

Pusterla opens second packaging facility in Tunisia

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Italian packaging producer Pusterla 1880 officially opened a new plant in Sousse, Tunisia, in mid-May. The facility is the group's second site in the country and is intended to strengthen its Mediterranean presence and proximity to European and international brand owners.

Pusterla initially invested €4m in the plant, with a further €3m planned for later expansion. The site has a 11,000 m² production facility, plus 3,500 m² of warehouse and logistics space, and focuses on production of high-end secondary packaging for beauty and fragrance, wines and spirits, fashion and jewellery with a staff of 260.

Pusterla attributes its investment in Tunisia, among other factors, to the availability of skilled labour, good transport links to Europe and the country's growing industrial base. Together with its existing Tunisian site in Jemmal, the company now employs around 600 people in the country.

Founded in Italy in 1880, the family-owned group produces bespoke luxury packaging, including rigid and round boxes and folding cartons. It operates manufacturing sites across Europe, Tunisia and the US, with an additional presence in Asia.

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Paper coatings: Amcor forges partnership with start-up Kelpi

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Swiss packaging group Amcor is partnering with the British start-up Kelpi to develop new coating technologies for packaging materials. At the heart of this cooperation is a bio-based coating technology developed by Kelpi, which is functionalised with plant oils and intended to provide gas and moisture barriers. The coating is also said to be compatible with the relevant paper recycling stream.

Amcor said that its research and development teams are currently assessing how it might use the technology in its fibre-based Amfiber portfolio. The partnership aims to broaden the application scope of fibre-based packaging while meeting key requirements such as barrier performance, high running speed and circularity. Kelpi described the partnership as a significant step in its mission to displace fossil fuel-based plastic packaging at scale.

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Nanning Sun Paper steps up capacities and pulp integration

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Chinese pulp and paper producer Nanning Sun Paper, a subsidiary of the listed company Shandong Sun Paper Industry, plans to add further capacity at its existing industrial site in Nanning, in the southern Chinese province of Guangxi. The parent company has budgeted total expenditure of up to RMB5bn, equivalent to around €600m, for the expansion of the industrial complex, according to an announcement dated 8 July. Among other installations, Nanning Sun Paper will build a pulp line with a production capacity of 500,000 tpy of unbleached kraft pulp (UKP), as well as a new “specialty paper machine” with a production capacity of 600,000 tpy

Completion and the start of trial production are scheduled for the fourth quarter of next year, following an 18-month construction period.

Nanning Sun Paper has awarded the contract for the new paper machine to Finnish machinery engineering company Valmet. Valmet confirmed to EUWID that the “specialty paper” machine is actually a production line for containerboard. The machine has a design capacity of 600,000 tpy and will manufacture linerboard grades based on fresh and recovered fibre. Valmet expects the new paper machine at Nanning Sun Paper to start production in autumn 2027.

Nanning Sun Paper was established in 2022 as a wholly owned subsidiary of Shandong Sun Paper Industry. Within just a few years after the takeover of the assets in Nanning, Sun Paper has built an industrial complex comprising numerous fibre lines and paper machines with a total capacity of up to 4 million tpy. These include more than 2 million t of packaging paper and board, 300,000 t of sanitary and household paper, 400,000 t of “specialty paper” for printing and packaging applications, and more than 1 million t of bleached and unbleached chemical and mechanical pulp.

Shandong Sun Paper as a whole has production capacities of 14 million tpy of paper and pulp. In recent years, the company has stepped up efforts to produce a larger share of the pulp required for its own paper production and is reported to have achieved an integration rate of more than 60 per cent by the end of 2025.

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Stora Enso no longer requires environmental permit in Lahti

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Stora Enso's Lahti packaging plant in Finland will no longer require an environmental permit. The company reported that the City of Lahti's Building and Environmental Permit Committee decided to revoke the site's environmental permit, as the plant's environmental impact has been significantly reduced through long-term investments and technical improvements. In the last years, Stora Enso had reduced CO₂ emissions, noise and wastewater impacts at the site while improving energy efficiency and overall environmental performance, the company added. Until now, the Lahti facility had operated under an open-ended environmental permit.

Stora Enso produces corrugated packaging such as food and transport packaging and employs around 340 people at the Lahti site. The company's two corrugated packaging plants in Lahti and Kristiinankaupunki have a combined annual production capacity of 160 million m².

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Perlen now producing recycled copy paper

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Swiss paper manufacturer Perlen Papier, a subsidiary of Perlen Industrieholding, recently launched a new recycled copy paper with the brand name Perlen Copy. According to the company, this is the first recycled copy paper produced in Switzerland. The 80 g/m² paper contains 80 per cent recovered fibres and has a whiteness rating of ISO 70 / CIE 55.

Perlen says it is currently driving the development of the new copy paper. "We have invested in paper machine PM 4 and in stock preparation. In the future, Perlen Copy will be produced from 100 per cent recovered paper and will meet the requirements of the Blue Angel environmental label. Several copy paper grades with different, higher levels of whiteness are currently under development and will be launched in the near term," the company said in response to an enquiry.

Perlen said it developed the recycled copy paper to meet existing demand. Millions of pages of paper were printed every day in Swiss offices and this fresh-fibre paper often came from South America or Scandinavia, the company noted.

Perlen is traditionally a producer of publication paper. The company says it is Switzerland's largest paper recycler, recycling more than 80 per cent of the recovered paper collected in the country at its paper mill. "With the launch of our new copy paper, we are investing in the future of our Swiss production site," the company commented.

Perlen Papier had previously announced plans to expand its paper portfolio: In addition to the copy paper, new products include recyclable paper bottles, moulded fibre packaging and paper-based flexible packaging solutions.

The company's Perlen Bottle is made using Pulpex technology. The single-use bottle is recyclable and intended to offer a sustainable alternative to glass and plastic bottles. It is produced exclusively under Pulpex license for Switzerland, southern Germany, Austria and Italy.

Perlen also offers moulded-fibre packaging solutions as a sustainable alternative to plastics. Application areas include food, FMCG, cosmetics, pharma or transport and protective packaging. A content-specific barrier is applied to the fibre form to protect it from oil, grease or water.

In the flexible packaging segment, Perlen also offers paper-based packaging to reduce the use of plastics. In these products, paper serves as the base carrier, enabling "more recyclable alternatives" to conventional plastic composites, which are "under increasing regulatory pressure," the company said.

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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 folding cartons 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. At its Turkish site, for example, a new printing press was now fully operational, the packaging manufacturer said. Van de Velde did not disclose any further details. In Türkiye, the company operates a facility in Silivri, to the west of Istanbul. In Poland, it runs two sites in Wysogotowo and Ustanów.

Van de Velde has a total of 17 plants across eight countries. With a workforce of more than 1,300 employees, the company manufactures folding cartons, paper cups, displays and corrugated board packaging for both the food and non-food sectors.

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DS Smith and Verdi conclude talks on German site closures

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DS Smith and the German trade union Verdi have confirmed that negotiations over the planned restructuring measures in Germany have been concluded. DS Smith said that an agreement had been reached with employee representatives and that the negotiations had been successfully completed, but declined to comment further.

Verdi confirmed to EUWID that an agreement had been reached on a reconciliation of interests and a social plan, with the approval of the collective bargaining committee. According to the union, the original plans for the closures remain largely unchanged, with production to be fully discontinued at five sites in Mannheim, Endigen, Donauwörth, Paderborn and Hövelhof. Neither Verdi nor DS Smith confirmed a concrete closure date for the different facilities. However, they are reportedly expected to be finalised before the end of 2026.

Verdi said that more departments, particularly in administration, would have a future within DS Smith than had been announced in November 2025. In addition, job cuts would be implemented well after the closures.

The union also said that parallel industrial action had taken place during the decisive phase of the negotiations. Following this, the employer had significantly improved its offer compared with its original proposals. From the perspective of Verdi members, a separate collective agreement was therefore no longer necessary.

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Thomas Morin appointed new President Fiber Packaging Huhtamaki

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Finnish packaging producer Huhtamaki has appointed **Thomas Morin** as President, Fiber Packaging, and member of the Global Executive Team with effect from 1 September 2026. He will report to **Ralf K. Wunderlich**, President and CEO, and will be based in Espoo, Finland. Morin joins Huhtamaki from TC Transcontinental, where he has served as CEO since 2019 and, before that, as President of the packaging division. He has more than 25 years of global leadership experience in the packaging industry at TC Transcontinental, Amcor, Alcan and Pechiney. He will succeed **Sara Engber**, who was appointed President, North America, of Huhtamaki in May 2026.

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Packex realigns business following integration into nodo group

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German folding carton producer **Packex** is realigning its business following its integration into the **Nodo group**. The company said the move would provide additional resources and expertise in production, sales, purchasing and corporate development, but did not disclose further details. Co-founder and former Managing Director **Julian Eberhard** as well as **Philipp Braun**, who was responsible for marketing and digitalisation, left Packex at the end of June. Nodo group Chief Commercial Officer **Albert Ostertag** has assumed group-wide responsibility for sales and business development.

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Carl Berberich withdraws temporary fuel surcharge

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German paper merchant **Carl Berberich** has withdrawn the fuel surcharge introduced at the end of March 2026. In response to the development in diesel prices at the time, the company had announced that it would impose a temporary fuel surcharge on deliveries from stock from 30 March. According to a company letter, the surcharge has no longer applied since 6 July following the stabilisation of diesel prices.

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Packsize continues buying spree in e-commerce packaging machinery segment

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US technology supplier **Packsize** has agreed to take over **Panotec**'s packaging machine business. Italy-based Panotec manufactures packaging machines for the production of corrugated shipping boxes for e-commerce applications. The deal, the financial details of which were not published, is still subject to customary closing conditions. Only in April 2025 did Packsize acquire the Dutch manufacturer of automated corrugated packaging solutions for e-commerce and fulfilment suppliers Sparck Technologies.

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Dunapack Packaging finalises takeover of Stora Enso's German corrugated packaging plants

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Dunapack Packaging has completed the acquisition of **Stora Enso's** German corrugated packaging plants. The transaction includes Gaster Wellpappe, Wellpappe Sausenheim and PTI. Dunapack had announced plans for the acquisition in mid-April, and the German Cartel Office gave the go-ahead on 2 June. Dunapack and Stora Enso did not provide any details on the transaction amount.

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South Africa investigates office paper imports

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South Africa is conducting a safeguard investigation into rising imports of A3 and A4 office paper. The proceedings cover shipments into the Southern African Customs Union (SACU) under tariff subheadings 4802.56.20 and 4802.56.90. The investigation was launched on 5 June 2026 and has not yet been concluded.

The application was filed by Mondi South Africa, with the support of Sappi Southern Africa. According to Mondi, imports of office paper increased sharply between the beginning of 2023 and the end of 2024. During the investigation period from 1 January 2023 to 31 December 2025, the company says it recorded declines in sales, production, profit, market share, capacity utilisation and employment.

Mondi attributes the increase in imports, among other factors, to the long-term decline in global demand for uncoated fine paper, worldwide overcapacity and the resulting export pressure on open markets. The South African authorities consider that there is sufficient prima facie evidence of a possible link between the rise in imports and the injury suffered by the domestic industry.

The initiation of the proceedings does not yet amount to a decision on specific safeguard measures. In South Africa, safeguard investigations typically take around ten months to reach a final decision. A preliminary decision is generally targeted within approximately six months.

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UK publishes RAM 2027 guidance for packaging recyclability assessments

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The UK government has published the Recyclability Assessment Methodology (RAM) 2027 guidance, setting out how producers must assess the recyclability of household packaging placed on the market during the 2027 reporting year. The methodology forms part of the UK's extended producer responsibility (EPR) scheme and underpins the modulation of disposal fees by assigning packaging a green, amber or red rating according to its recyclability. RAM 2027 will apply to household packaging placed on the market between 1 January and 31 December 2027.

For paper and board packaging, the revised guidance does not introduce any fundamental changes. As before, fibre-based packaging containing more than 5 per cent plastic by weight must be assessed as a fibre-based composite material rather than as paper or board.

Fibre-based composite beverage cartons continue to be assigned an amber rating, reflecting the fact that, although technically recyclable, they are not yet widely reprocessed within the UK's household recycling infrastructure.

The methodology further specifies that paper and board packaging designed for food to be heated within it, such as certain ready-meal formats, should be classified as non-recyclable at the collection stage (and assigned a red rating) because of expected food contamination.

The treatment of greaseproof, siliconised and waxed paper/board has been clarified. RAM 2027 says these are red at collection stage, but expressly exempts wax dispersion coatings and silicone in linerless labels. RAM 2027 also rules that paper labels with silicone release coating, for example linerless labels, are amber at reprocessing stage if silicone content exceeds 0.3 per cent by weight.

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UK EPR fees for fibre-based composite packaging may be too high

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The UK packaging EPR fee for fibre-based composite packaging may have been set too high, according to a report commissioned by the Alliance for Beverage Cartons and the Environment UK (Ace UK) and published by consultancy Beyondly. The report argues that the £461/t fee charged by Pack UK for fibre-based composites, including liquid cartons, sandwich wrappers and ready-meal containers, may have been overinflated by at least £34/t and potentially by as much as £92/t.

Applied to last year's reported tonnages, this could mean that producers paid between £5m and £13m too much in PEPR fees for fibre-based composite packaging, Beyondly writes. The main point of criticism is the assumed local authority collection cost. According to the report, Pack UK's model applies a collection cost of £509/t to fibre-based composites, compared with £264/t for paper and cardboard, although Ace UK and Beyondly argue that the two material streams have similar characteristics in the collection process.

The report says the model may overstate collection costs in two ways. Firstly, it appears to assume that liquid cartons account for a larger share of the fibre-based composite category than is actually the case. Secondly, it treats non-liquid fibre-based composites as having the same bulk density as paper and cardboard, a category that is strongly influenced by bulky corrugated boxes.

Beyondly also points to further factors that could reduce the fee. The current approach reportedly assumes that liquid cartons and similar packaging are not compacted by consumers or collection vehicles. Taking compaction into account could reduce fees by around a further 10 per cent, although the report says this would require additional research and a change in PackUK's methodology.

The report also raises concerns about possible misreporting of fibre-based composites as paper and cardboard, as packaging in the two categories can be similar in appearance and performance. While Beyondly says early analysis of its data does not suggest that misreporting alone explains broader changes in paper and cardboard tonnages, even modest misclassification could have a material impact on the fee.

Ben Powell, Head of External Affairs at Ace UK, said it was "clearly implausible" to charge nearly twice as much for local authorities to collect one tonne of fibre-based composites as for one tonne of paper and cardboard. Ace UK said it would continue to work with Pack UK to ensure that disposal fees are fair for all packaging types.

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Cepi: European paper industry faces renewed decline in 2025

Packaging paper segment relatively stable / Global concerns mounting

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The European paper market showed only a slight overall decline over the past year. However, this masks significant differences between product categories as well as a major structural shift. As the Confederation of European Paper Industries (Cepi) explained when presenting its annual statistics and market trends for 2025, this shift is reflected in the widening gap between the relatively stable market performance of packaging papers, with the exception of board, and the continued sharp decline in graphic papers. Initial figures for the first quarter of 2026 confirm the downward trend; with the exception of tissue, all sectors are showing a decline in apparent consumption. Beyond current market developments in Europe, global competition is intensifying, and its effects are being exacerbated by a difficult geopolitical environment, according to Cepi.

The industry has steadily lost production capacity over the past three years, the association states, while the share of imports has reached a record high of 7.7 per cent of EU consumption. Although exports still accounted for more than 20 per cent of production, the EU's trade balance deteriorated slightly last year. Cepi identifies government subsidies abroad and asymmetrical market conditions as factors undermining the competitiveness of European industry. The association is calling for coherent policy responses that strengthen trade defence instruments, provide a reliable and investment-friendly regulatory framework, and bolster Europe's bio-based value chains. With regard to the latter, Cepi states that the aim is to tap into a global market potential of €6.6 tn by 2030 in the growing markets of the bioeconomy.

Production and demand down on previous year, exports growing

Production in the paper segment remained 1.6 per cent below the previous year's figure last year, having suffered a slump of 12.9 per cent in 2023 and recovered by 5.7 per cent in 2024. Demand and apparent consumption followed a very similar trend. In addition to the tissue market, production in the packaging segments of corrugated case material and flexible packaging paper also developed positively; however, production and demand for cartonboard fell by 5 per cent.

The pulp market in the Cepi countries also contracted by almost 5 per cent, with total production falling by 1.2 per cent. Growth was seen only in market pulp, where production rose slightly over the past year, mainly due to a sharp rise in exports. Similarly, paper and board exports grew by 1.3 per cent, and despite imports rising by 1.7 per cent, the balance of trade remained positive.

For the well-known structural reasons, the market for printing and writing papers continued to decline.

The distribution of total production has shifted further towards packaging; packaging paper and board now account for around two-thirds of production volume in Cepi countries.

Cepi: Paper and Board Production and Consumption

1,000 tonnes	Production			Apparent consumption		
	2024	2025	% 2025/2024	2024	2025	% 2025/2024
Newsprint	2,720	2,521	- 7.3	2,759	2,495	- 9.6
Uncoated mechanical	2,900	2,586	- 10.9	2,477	2,246	- 9.3
Coated mechanical	2,642	2,358	- 10.8	2,003	1,840	- 8.1
Uncoated woodfree	6,002	5,721	- 4.7	5,019	4,723	- 5.9
Coated woodfree	3,080	2,888	- 6.2	1,985	1,924	- 3.1
Printing and writing papers	14,624	13,552	- 7.3	11,484	10,732	- 6.5
Total graphic papers	17,344	16,074	- 7.3	14,243	13,228	- 7.1
Tissue paper	8,149	8,163	+ 0.2	8,334	8,427	+ 1.1
Containerboard	32,384	32,906	+ 1.6	29,526	29,451	- 0.3
Cartonboard	8,948	8,466	- 5.4	6,163	5,841	- 5.2
Wrappings	4,340	4,385	+ 1.0	2,958	3,023	+ 2.2
Other paper and board for packaging	3,902	3,752	- 3.8	3,532	3,426	- 3.0
Total packaging paper and board	49,574	49,509	- 0.1	42,180	41,740	- 1.0
Other paper and board	3,563	3,619	+ 1.6	3,366	3,410	+ 1.3
Total paper and board	78,630	77,365	- 1.6	68,123	66,805	- 1.9
Including speciality paper and board	10,574	10,696	+ 1.2			

Source: Cepi

An industry facing recurring crises

Like many industrial sectors, the paper industry in Europe has experienced several crises and disruptive developments over the past six years. Following the Covid-19 crisis that began in 2020 – with slumps in production and demand – and the technical recovery that took place the following year, it was primarily the war in Ukraine and the resulting inflation that took a heavy toll on the markets from 2022 onwards. Despite positive developments the following year, the paper and board markets have not yet fully recovered from this slump, nor has the packaging paper market, which is still expected to grow in the long term.

In the current year, the paper industry has entered another crisis phase due to the war in Iran, although the impact on oil and, above all, gas prices, for example, is nowhere near as drastic as it was at the start of the war in Ukraine. There have been further cost increases, for example in logistics, but the main issue is a weak market environment characterised by uncertainty. Cepi also sees competitiveness as having deteriorated further due to the current market situation, which is partly shaped by the war in Iran.

There are no winners in the tariff dispute with the US

Cepi sums up the dispute between the two economic blocs by stating that the renewed tariff dispute between the EU and the US, which resurfaced in February last year, has not proved beneficial to either side. Total EU imports of paper and board from the US fell by 12.4 per cent year-on-year to 130,000 t in the first quarter of 2026, whilst EU exports of paper and board to the US fell by 13.9 per cent to 476,000 t.

Cepi believes that, in the international context, the European pulp and paper industry is increasingly subject to trade defence measures imposed by other countries and notes that, over the past 25 years, third countries have launched 45 investigations into EU exports with a view to introducing safeguard or anti-dumping measures. The EU, by contrast, has initiated only six such investigations into imports into the EU.

To strengthen the interests of the European paper industry, Cepi has joined the European industry alliance Aegis Europe, comprising more than 20 national and European trade associations. It advocates for fair international competition and calls on the EU to implement strong measures against dumping and state-subsidised overcapacity.

Cepi: Total Pulp Production and Consumption						
1,000 tonnes	Production			Apparent consumption		
	2024	2025	% 2025/2024	2024	2025	% 2025/2024
Mechanical and semi-chemical pulp	6,922	6,599	- 4.7	6,809	6,329	- 7.1
Sulphite pulp	2,052	2,150	+ 4.8	1,585	1,748	+ 10.3
Sulphate pulp	25,507	25,312	- 0.8	27,285	25,931	- 5.0
Chemical pulp	27,559	27,462	- 0.4	28,870	27,679	- 4.1
Total woodpulp	34,481	34,062	- 1.2	35,679	34,007	- 4.7
Other pulp	152	146	- 3.8	297	255	- 14.2
Total pulp	34,633	34,208	- 1.2	35,976	34,263	- 4.8
Source: Cepi						

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Euro Commerce calls for 12-month PPWR grace period amid implementation concerns

📅 **EUWID +** 15 July 2026 | ⌚ ~ 2 min | [Published in issue 29/2026](#)

Euro Commerce, the European organisation representing the retail and wholesale sectors, has called on the European Commission to provide further guidance on the implementation of the EU's Packaging and Packaging Waste Regulation (PPWR) and to introduce a 12-month transitional period. This appeal comes ahead of the first PPWR provisions taking effect on 12 August 2026. Euro Commerce is of the opinion that significant legal uncertainty and practical implementation issues remain unresolved.

In particular, Euro Commerce is calling for clearer guidance on key technical requirements, including the information to be included in declarations of conformity (DoC) and the implementation of the PPWR's restrictions on PFAS.

Until a harmonised EU testing method is available, the association is urging member states to accept both the Commission's guidance and the methodology currently being developed by the PFAS Task Force as interim reference frameworks.

Euro Commerce is also calling for adequate lead times between the adoption and application of future delegated and implementing acts, as well as practicable requirements for packaging reuse.

In addition, the association is seeking a 12-month grace period following the PPWR's date of application, during which businesses and authorities could implement the new requirements without facing penalties.

Euro Commerce's call for a 12-month transitional period did not receive formal backing from EU environment ministers at their meeting in late June. The Council adopted no decision on the matter.

The implementation of the PPWR was nevertheless discussed under "Any other business" at the request of the Czech Republic, Bulgaria, Italy, Latvia, Poland, Romania, Slovakia and Slovenia. Like Euro Commerce, the eight member states highlighted significant practical challenges surrounding the regulation's implementation.

In a joint paper, they called on the European Commission to publish a binding timetable for the outstanding delegated and implementing acts, accelerate work on guidance and frequently asked questions, and establish a structured dialogue with member states and market-surveillance authorities. The measures are intended to improve legal certainty and ensure harmonised application of the PPWR across the EU. They did not, however, request a postponement of the application date or a general transitional period.

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No summer price concessions on German market for recycled corrugated case material

Seasonally slower business with LWC and SC paper creates tension

 15 July 2026 | ⌚ ~ 10 min

On the market for publication paper, the latest price round for deliveries as of July has not generated much debate. In the view of a number of players, it was already clear ahead of the talks that paper mills would have almost no chance of achieving sizeable price hikes for magazine and catalogue papers, owing to the abundant supply and steeply declining demand. Nevertheless, the market is still in motion.

Manufacturers of brown recycled corrugated case material continue to have high production output while simultaneously drawing down inventories. Against this backdrop, attempts to implement the usual summer discounts are proving unsuccessful. For July, many respondents described a sideways price movement. There is a mixed picture in the corrugated board market in Germany right now. While certain statistics show significant regional growth, most of the companies surveyed by EUWID do not confirm this development. One thing the companies do agree on is that slight volume increases do not compensate for the ongoing cost pressure. In the fresh-fibre board market, the energy cost surcharges are now up for discussion. In this context, buyers point to board producers' previous statements saying they generate a large share of their own energy and are thus relatively immune to volatility on external energy markets.

Weak summer business for magazine and catalogue papers in Germany

Players in the German market for LWC and SC paper are suffering from the summer slump. This seasonal slowdown is impacting both paper mills and printing companies. Representatives from both industries say the situation is accelerating the consolidation process. Even though a few players expect business to pick up from late September onwards, today's thin order books are causing problems for some companies.

The market remains challenging, experts stress. Paper industry representatives say that a reduction in supply is urgently needed. They are feeling the squeeze from shrinking demand from the publishing as well as commercial printing markets combined with high production costs. In response, the short-term measures include temporary downtimes, changing portfolios and spot deals, especially in the export market.

In a few cases, companies are taking advantage of the situation to carry out major maintenance work at their mills. However, players are not providing detailed reports about the extent of machine downtime, saying only that they are able to supply customers despite reduced or idled production.

Printing companies are in a similar situation: Given the excess supply, high costs and, above all, fierce competition, they feel forced to eliminate jobs, partially or even permanently close their printing machines, and are often fighting for survival.

Nevertheless, pricing remained contested in the latest negotiations for LWC and SC paper. Some producers of uncoated magazine and catalogue paper were looking to raise prices even though representatives of the printing and advertising

industries were calling for price reductions, warning that higher paper prices would adversely impact volume planning and demand.

Buyers argued that in some cases, European mills had very good activity levels for SC paper, while customers sometimes no longer had the ability to switch to alternative suppliers. Ultimately, paper producers in this segment were occasionally able to implement price increases as of July, the market survey found. In many cases, these mark-ups were merely “cosmetic” at €5-10/t. However, higher mark-ups are also reported, depending on the supplier and the starting price level.

Paper industry representatives say that price negotiations for SC rotogravure grades mirrored those of offset grades.

For LWC, however, price increases were achieved only in isolated cases. The offset LWC segment continues to suffer from a massive oversupply and steadily shrinking demand. Market experts report that capacity utilisation on the paper machines is not satisfactory. Accordingly, paper suppliers are nervous because they feel they cannot risk losing any volumes, EUWID was told. Against this backdrop, producers confirm that during the latest price round they were unable to achieve further increases that might have lifted prices to a level they would consider adequate. In many cases, producers and buyers agreed quite early in the talks to roll over the existing prices.

However, several market participants also reported lower-priced offers, with quotes for standard LWC 60 g often falling below the €800/t mark. Market sources mentioned both summer discounts as well as offers below list prices. Paper industry representatives stressed that so-called project prices – price concessions offered for major print customers and printing companies – have not disappeared entirely from the publication paper segment.

Some paper suppliers continue to warn that these deals do not make economic sense. Moreover, paper industry representatives point out that the results of the latest price round must be viewed in the context of previous developments: The price increases that were announced and implemented at the start of the second quarter had not taken effect across the board, particularly where longer-term supply agreements remained in effect.

Consequently, some catch-up adjustments were needed in the latest price round. Despite the broadly stable trend, producers achieved isolated price increases, industry experts said.

Producers of recycled CCM report good utilisation and inventory drawdown

In July, corrugated board manufacturers in Germany were unable to achieve any summer discounts for recycled corrugated case materials from the paper industry. According to buyers, suppliers are firmly rejecting requests for even relatively small reductions of €10-20/t, although such figures are well below the level of the most recent price hikes. Paper producers point to industry statistics showing the paper industry has been producing at a high level for months, while simultaneously drawing down inventories. With the market humming along, they believe there is no reason to grant price concessions. On occasion, it can even be difficult to acquire spot volumes of recycled corrugated case material, according to market participants. Paper mills report that some of their competitors are inquiring about available volumes.

Yet, paper producers did not have a clear explanation for this market trend at the beginning of July. The companies surveyed by EUWID suspect that the additional production output is largely heading to the export market, especially overseas. But the available statistics do not provide reliable figures to support this theory, say market insiders.

Nevertheless, suppliers of brown recycled corrugated case material have not been able to use the current situation to their own advantage. Despite the generally good market environment, the latest price hike announcements presented to the market in June could not be implemented.

Producers of coated and uncoated white-top testliner say the scenario of high production combined with inventory drawdown does not apply to their market segment as demand for white grades is suffering from ongoing substitution with brown papers, they explain. Moreover, producers believe that the price hikes of €40/t implemented in the second quarter are insufficient. However, paper mills see no scope for matching white-top testliner price adjustments with those of brown papers.

Corrugated board producers dissatisfied with earnings despite volume growth

Players in the German corrugated board industry have difficulty forecasting the future as well as assessing the current market situation. While individual statistics surveys show regional growth of up to 7 per cent on a square-meter basis in recent weeks, only a handful of companies surveyed by EUWID confirmed such a trend. Depending on which sales markets they serve, producers' comments were more in line with the current lacklustre macroeconomic forecasts, ranging from slight declines to growth of maximum 1 per cent. Moreover, capacity utilisation rates of 70 to 75 per cent in the corrugated board industry are not the exception, the market survey found.

Even if slight year-on-year volume growth is possible at the moment, it does not compensate for increased costs and will still lead to lower earnings at the current price levels, companies say. For the industry to operate profitably in the long term, it needs stronger demand and the ability to pass along the high cost burden, EUWID was told.

However, the talks about price adjustments are going better than expected, companies say. Despite numerous tenders, the higher costs could usually be passed along to customers. By contrast, corrugated companies are increasingly inclined to withdraw from tenders if customers are trying to achieve what they believe are "unrealistic" savings potentials.

March was the only month with verifiable and industry-wide positive business development, say respondents, who report growth of more than 5 per cent on a square-meter basis for that month. But, as they note, this came after downward trends in January and February, with a cumulative decline of nearly 4 per cent.

For July and August, most insiders expect seasonally typical demand. Many believe the recent slowdown in the market is the typical summer dip. Only companies that have a high share of large customers report seeing additional demand effects resulting from the Middle East conflict. Many customers had built up inventories to prepare for anticipated cost increases as a result of potential volatility on energy markets. Those inventories are now dampening current demand, which is further intensifying the seasonal summer slump for some companies. Market participants surveyed by EUWID say it is still unclear how potential factory closures, new capacities and the market entry of a further supplier will affect the German corrugated board market.

At the moment, players expect do not expect much positive impetus from the EU Packaging and Packaging Waste Regulation (PPWR). Besides the burden of additional administration relating to declarations of conformity, they see a risk of greater substitution in favour of paper sacks and bags. But an even bigger worry for the industry is that the world's largest trading platform has been increasingly reducing its general packaging consumption over the past years.

Energy surcharge for GC board up for discussion again

After some Scandinavian producers of fresh-fibre board introduced an energy surcharge in response to the Middle East conflict, buyers on the market in Germany are now increasingly questioning these fees. They point to previous statements by board producers that the companies generate a high share of their own energy and are thus relatively independent of volatility on external energy markets. Against this backdrop, converters are making more of an effort to have these surcharges rescinded.

Not all sellers had described the increases of around €30/t purely as an energy cost surcharge; some said it was a necessary price hike owing to numerous cost factors. In early July, it looks like the surcharges that were previously justified solely with energy costs have now been attributed to general cost increases, so the original €30/t has now effectively been lowered to €15-20.

Reported utilisation rates for board machines can vary significantly from one GC producer to the next. Folding cartons producers must reportedly plan for delivery times of up to 12 weeks in some cases, depending on the grade and supplier. It is unclear why lead times are unusually long, given that folding cartons producers are not seeing any growth and the market is generally over- rather than undersupplied. Some attribute this to transport problems, while others say it is due to volumes being shifted around after the Folbb insolvency as well as the influence of the market-related downtimes or maintenance shutdowns announced for the third quarter. According to market experts, the Folbb situation shows once again that concentrating on one individual supplier (single sourcing) is the wrong strategy in some markets and can lead to significant problems.

It is a mixed picture in the market for recycled board. While some producers report very good demand and delivery times of up to five weeks or longer, other players say capacity utilisation is still good but business has been tapering off for the past two or three weeks. EUWID respondents in Germany say that delivery times continue to be extended not because of good demand for packaging but rather because of the situation of individual competitors. With supply security in mind, customers are systematically moving volumes to other producers to stabilise incoming deliveries amidst uncertainty, they explain.

German prices for GD board and unlined chipboard reportedly moved sideways at the start of July. Where increases took effect at the beginning of the third quarter, these were only delayed adjustments and not a new step, EUWID was told.

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Price hikes set the tone in Poland's paper and board markets in the first half of the year

Summer business kicks off in largely stable market conditions

 15 July 2026 | ⌚ ~ 15 min

The Polish market is playing an increasingly important role in Germany's economy, with Poland expected to overtake France this year as Germany's second-largest EU trading partner. These close ties are clearly reflected in the paper and packaging markets. Price movements, investment decisions and capacity changes on one side of the Polish-German border often make themselves felt on the other.

EUWID Price Watch Poland			
Second quarter 2026			
Prices in PLN/t per tonne free delivered	Second quarter 2026	First quarter 2026	Second quarter 2025
Graphic paper			
Woodfree coated	5,175 - 5,875	5,000 - 5,650	5,010 - 5,150
Copier paper 80 g/m ² (grades 1/2/3)	850 - 900	770 - 810	810 - 910
Copier paper 90 g/m ² (grades 1/2/3)	910 - 930	830 - 870	870 - 930
Other grades 80 g/m ² (1/2/3)	880 - 910	810 - 850	870 - 930
Other grades 90 g/m ² (1/2/3)	910 - 930	830 - 870	870 - 930
Other grades 100 g/m ² (1/2/3)	940 - 960	860 - 900	900 - 960
Woodfree uncoated			
Woodfree uncoated, 100 g/m ² (1/2/3)	5,470 - 6,100	5,370 - 6,000	5,400 - 6,100
Woodfree uncoated, 100 g/m ² (4/5)	5,800 - 6,000	5,600 - 5,800	5,800 - 6,000
Woodfree uncoated, 100 g/m ² (6/7)	6,100 - 6,300	5,900 - 6,100	6,100 - 6,300
Woodfree uncoated, 100 g/m ² (8/9)	6,400 - 6,600	6,200 - 6,400	6,400 - 6,600
Woodfree uncoated, 100 g/m ² (10/11)	6,700 - 6,900	6,500 - 6,700	6,700 - 6,900
Woodfree uncoated, 100 g/m ² (12/13)	7,000 - 7,200	6,800 - 7,000	7,000 - 7,200
Woodfree uncoated, 100 g/m ² (14/15)	7,300 - 7,500	7,100 - 7,300	7,300 - 7,500
Woodfree uncoated, 100 g/m ² (16/17)	7,600 - 7,800	7,400 - 7,600	7,600 - 7,800
Woodfree uncoated, 100 g/m ² (18/19)	7,900 - 8,100	7,700 - 7,900	7,900 - 8,100
Woodfree uncoated, 100 g/m ² (20/21)	8,200 - 8,400	8,000 - 8,200	8,200 - 8,400
Woodfree uncoated, 100 g/m ² (22/23)	8,500 - 8,700	8,300 - 8,500	8,500 - 8,700
Woodfree uncoated, 100 g/m ² (24/25)	8,800 - 9,000	8,600 - 8,800	8,800 - 9,000
Woodfree uncoated, 100 g/m ² (26/27)	9,100 - 9,300	8,900 - 9,100	9,100 - 9,300
Woodfree uncoated, 100 g/m ² (28/29)	9,400 - 9,600	9,200 - 9,400	9,400 - 9,600
Woodfree uncoated, 100 g/m ² (30/31)	9,700 - 9,900	9,500 - 9,700	9,700 - 9,900
Woodfree uncoated, 100 g/m ² (32/33)	10,000 - 10,200	9,800 - 10,000	10,000 - 10,200
Woodfree uncoated, 100 g/m ² (34/35)	10,300 - 10,500	10,100 - 10,300	10,300 - 10,500
Woodfree uncoated, 100 g/m ² (36/37)	10,600 - 10,800	10,400 - 10,600	10,600 - 10,800
Woodfree uncoated, 100 g/m ² (38/39)	10,900 - 11,100	10,700 - 10,900	10,900 - 11,100
Woodfree uncoated, 100 g/m ² (40/41)	11,200 - 11,400	11,000 - 11,200	11,200 - 11,400
Woodfree uncoated, 100 g/m ² (42/43)	11,500 - 11,700	11,300 - 11,500	11,500 - 11,700
Woodfree uncoated, 100 g/m ² (44/45)	11,800 - 12,000	11,600 - 11,800	11,800 - 12,000
Woodfree uncoated, 100 g/m ² (46/47)	12,100 - 12,300	11,900 - 12,100	12,100 - 12,300
Woodfree uncoated, 100 g/m ² (48/49)	12,400 - 12,600	12,200 - 12,400	12,400 - 12,600
Woodfree uncoated, 100 g/m ² (50/51)	12,700 - 12,900	12,500 - 12,700	12,700 - 12,900
Woodfree uncoated, 100 g/m ² (52/53)	13,000 - 13,200	12,800 - 13,000	13,000 - 13,200
Woodfree uncoated, 100 g/m ² (54/55)	13,300 - 13,500	13,100 - 13,300	13,300 - 13,500
Woodfree uncoated, 100 g/m ² (56/57)	13,600 - 13,800	13,400 - 13,600	13,600 - 13,800
Woodfree uncoated, 100 g/m ² (58/59)	13,900 - 14,100	13,700 - 13,900	13,900 - 14,100
Woodfree uncoated, 100 g/m ² (60/61)	14,200 - 14,400	14,000 - 14,200	14,200 - 14,400
Woodfree uncoated, 100 g/m ² (62/63)	14,500 - 14,700	14,300 - 14,500	14,500 - 14,700
Woodfree uncoated, 100 g/m ² (64/65)	14,800 - 15,000	14,600 - 14,800	14,800 - 15,000
Woodfree uncoated, 100 g/m ² (66/67)	15,100 - 15,300	14,900 - 15,100	15,100 - 15,300
Woodfree uncoated, 100 g/m ² (68/69)	15,400 - 15,600	15,200 - 15,400	15,400 - 15,600
Woodfree uncoated, 100 g/m ² (70/71)	15,700 - 15,900	15,500 - 15,700	15,700 - 15,900
Woodfree uncoated, 100 g/m ² (72/73)	16,000 - 16,200	15,800 - 16,000	16,000 - 16,200
Woodfree uncoated, 100 g/m ² (74/75)	16,300 - 16,500	16,100 - 16,300	16,300 - 16,500
Woodfree uncoated, 100 g/m ² (76/77)	16,600 - 16,800	16,400 - 16,600	16,600 - 16,800
Woodfree uncoated, 100 g/m ² (78/79)	16,900 - 17,100	16,700 - 16,900	16,900 - 17,100
Woodfree uncoated, 100 g/m ² (80/81)	17,200 - 17,400	17,000 - 17,200	17,200 - 17,400
Woodfree uncoated, 100 g/m ² (82/83)	17,500 - 17,700	17,300 - 17,500	17,500 - 17,700
Woodfree uncoated, 100 g/m ² (84/85)	17,800 - 18,000	17,600 - 17,800	17,800 - 18,000
Woodfree uncoated, 100 g/m ² (86/87)	18,100 - 18,300	17,900 - 18,100	18,100 - 18,300
Woodfree uncoated, 100 g/m ² (88/89)	18,400 - 18,600	18,200 - 18,400	18,400 - 18,600
Woodfree uncoated, 100 g/m ² (90/91)	18,700 - 18,900	18,500 - 18,700	18,700 - 18,900
Woodfree uncoated, 100 g/m ² (92/93)	19,000 - 19,200	18,800 - 19,000	19,000 - 19,200
Woodfree uncoated, 100 g/m ² (94/95)	19,300 - 19,500	19,100 - 19,300	19,300 - 19,500
Woodfree uncoated, 100 g/m ² (96/97)	19,600 - 19,800	19,400 - 19,600	19,600 - 19,800
Woodfree uncoated, 100 g/m ² (98/99)	19,900 - 20,100	19,700 - 19,900	19,900 - 20,100
Woodfree uncoated, 100 g/m ² (100/101)	20,200 - 20,400	20,000 - 20,200	20,200 - 20,400
Woodfree uncoated, 100 g/m ² (102/103)	20,500 - 20,700	20,300 - 20,500	20,500 - 20,700
Woodfree uncoated, 100 g/m ² (104/105)	20,800 - 21,000	20,600 - 20,800	20,800 - 21,000
Woodfree uncoated, 100 g/m ² (106/107)	21,100 - 21,300	20,900 - 21,100	21,100 - 21,300
Woodfree uncoated, 100 g/m ² (108/109)	21,400 - 21,600	21,200 - 21,400	21,400 - 21,600
Woodfree uncoated, 100 g/m ² (110/111)	21,700 - 21,900	21,500 - 21,700	21,700 - 21,900
Woodfree uncoated, 100 g/m ² (112/113)	22,000 - 22,200	21,800 - 22,000	22,000 - 22,200
Woodfree uncoated, 100 g/m ² (114/115)	22,300 - 22,500	22,100 - 22,300	22,300 - 22,500
Woodfree uncoated, 100 g/m ² (116/117)	22,600 - 22,800	22,400 - 22,600	22,600 - 22,800
Woodfree uncoated, 100 g/m ² (118/119)	22,900 - 23,100	22,700 - 22,900	22,900 - 23,100
Woodfree uncoated, 100 g/m ² (120/121)	23,200 - 23,400	23,000 - 23,200	23,200 - 23,400
Woodfree uncoated, 100 g/m ² (122/123)	23,500 - 23,700	23,300 - 23,500	23,500 - 23,700
Woodfree uncoated, 100 g/m ² (124/125)	23,800 - 24,000	23,600 - 23,800	23,800 - 24,000
Woodfree uncoated, 100 g/m ² (126/127)	24,100 - 24,300	23,900 - 24,100	24,100 - 24,300
Woodfree uncoated, 100 g/m ² (128/129)	24,400 - 24,600	24,200 - 24,400	24,400 - 24,600
Woodfree uncoated, 100 g/m ² (130/131)	24,700 - 24,900	24,500 - 24,700	24,700 - 24,900
Woodfree uncoated, 100 g/m ² (132/133)	25,000 - 25,200	24,800 - 25,000	25,000 - 25,200
Woodfree uncoated, 100 g/m ² (134/135)	25,300 - 25,500	25,100 - 25,300	25,300 - 25,500
Woodfree uncoated, 100 g/m ² (136/137)	25,600 - 25,800	25,400 - 25,600	25,600 - 25,800
Woodfree uncoated, 100 g/m ² (138/139)	25,900 - 26,100	25,700 - 25,900	25,900 - 26,100
Woodfree uncoated, 100 g/m ² (140/141)	26,200 - 26,400	26,000 - 26,200	26,200 - 26,400
Woodfree uncoated, 100 g/m ² (142/143)	26,500 - 26,700	26,300 - 26,500	26,500 - 26,700
Woodfree uncoated, 100 g/m ² (144/145)	26,800 - 27,000	26,600 - 26,800	26,800 - 27,000
Woodfree uncoated, 100 g/m ² (146/147)	27,100 - 27,300	26,900 - 27,100	27,100 - 27,300
Woodfree uncoated, 100 g/m ² (148/149)	27,400 - 27,600	27,200 - 27,400	27,400 - 27,600
Woodfree uncoated, 100 g/m ² (150/151)	27,700 - 27,900	27,500 - 27,700	27,700 - 27,900
Woodfree uncoated, 100 g/m ² (152/153)	28,000 - 28,200	27,800 - 28,000	28,000 - 28,200
Woodfree uncoated, 100 g/m ² (154/155)	28,300 - 28,500	28,100 - 28,300	28,300 - 28,500
Woodfree uncoated, 100 g/m ² (156/157)	28,600 - 28,800	28,400 - 28,600	28,600 - 28,800
Woodfree uncoated, 100 g/m ² (158/159)	28,900 - 29,100	28,700 - 28,900	28,900 - 29,100
Woodfree uncoated, 100 g/m ² (160/161)	29,200 - 29,400	29,000 - 29,200	29,200 - 29,400
Woodfree uncoated, 100 g/m ² (162/163)	29,500 - 29,700	29,300 - 29,500	29,500 - 29,700
Woodfree uncoated, 100 g/m ² (164/165)	29,800 - 30,000	29,600 - 29,800	29,800 - 30,000
Woodfree uncoated, 100 g/m ² (166/167)	30,100 - 30,300	29,900 - 30,100	30,100 - 30,300
Woodfree uncoated, 100 g/m ² (168/169)	30,400 - 30,600	30,200 - 30,400	30,400 - 30,600
Woodfree uncoated, 100 g/m ² (170/171)	30,700 - 30,900	30,500 - 30,700	30,700 - 30,900
Woodfree uncoated, 100 g/m ² (172/173)	31,000 - 31,200	30,800 - 31,000	31,000 - 31,200
Woodfree uncoated, 100 g/m ² (174/175)	31,300 - 31,500	31,100 - 31,300	31,300 - 31,500
Woodfree uncoated, 100 g/m ² (176/177)	31,600 - 31,800	31,400 - 31,600	31,600 - 31,800
Woodfree uncoated, 100 g/m ² (178/179)	31,900 - 32,100	31,700 - 31,900	31,900 - 32,100
Woodfree uncoated, 100 g/m ² (180/181)	32,200 - 32,400	32,000 - 32,200	32,200 - 32,400
Woodfree uncoated, 100 g/m ² (182/183)	32,500 - 32,700	32,300 - 32,500	32,500 - 32,700
Woodfree uncoated, 100 g/m ² (184/185)	32,800 - 33,000	32,600 - 32,800	32,800 - 33,000
Woodfree uncoated, 100 g/m ² (186/187)	33,100 - 33,300	32,900 - 33,100	33,100 - 33,300
Woodfree uncoated, 100 g/m ² (188/189)	33,400 - 33,600	33,200 - 33,400	33,400 - 33,600
Woodfree uncoated, 100 g/m ² (190/191)	33,700 - 33,900	33,500 - 33,700	33,700 - 33,900
Woodfree uncoated, 100 g/m ² (192/193)	34,000 - 34,200	33,800 - 34,000	34,000 - 34,200
Woodfree uncoated, 100 g/m ² (194/195)	34,300 - 34,500	34,100 - 34,300	34,300 - 34,500
Woodfree uncoated, 100 g/m ² (196/197)	34,600 - 34,800	34,400 - 34,600	34,600 - 34,800
Woodfree uncoated, 100 g/m ² (198/199)	34,900 - 35,100	34,700 - 34,900	34,900 - 35,100
Woodfree uncoated, 100 g/m ² (200/201)	35,200 - 35,400	35,000 - 35,200	35,200 - 35,400
Woodfree uncoated, 100 g/m ² (202/203)	35,500 - 35,700	35,300 - 35,500	35,500 - 35,700
Woodfree uncoated, 100 g/m ² (204/205)	35,800 - 36,000	35,600 - 35,800	35,800 - 36,000
Woodfree uncoated, 100 g/m ² (206/207)	36,100 - 36,300	35,900 - 36,100	36,100 - 36,300
Woodfree uncoated, 100 g/m ² (208/209)	36,400 - 36,600	36,200 - 36,400	36,400 - 36,600
Woodfree uncoated, 100 g/m ² (210/211)	36,700 - 36,900	36,500 - 36,700	36,700 - 36,900
Woodfree uncoated, 100 g/m ² (212/213)	37,000 - 37,200	36,800 - 37,000	37,000 - 37,200
Woodfree uncoated, 100 g/m ² (214/215)	37,300 - 37,500	37,100 - 37,300	37,300 - 37,500
Woodfree uncoated, 100 g/m ² (216/217)	37,600 - 37,800	37,400 - 37,600	37,600 - 37,800
Woodfree uncoated, 100 g/m ² (218/219)	37,900 - 38,100	37,700 - 37,900	37,900 - 38,100
Woodfree uncoated, 100 g/m ² (220/221)	38,200 - 38,400	38,000 - 38,200	38,200 - 38,400
Woodfree uncoated, 100 g/m ² (222/223)	38,500 - 38,700	38,300 - 38,500	38,500 - 38,700
Woodfree uncoated, 100 g/m ² (224/225)	38,800 - 39,000	38,600 - 38,800	38,800 - 39,000
Woodfree uncoated, 100 g/m ² (226/227)	39,100 - 39,300	38,900 - 39,100	39,100 - 39,300
Woodfree uncoated, 100 g/m ² (228/229)	39,400 - 39,600	39,200 - 39,400	39,400 - 39,600
Woodfree uncoated, 100 g/m ² (230/231)	39,700 - 39,900	39,500 - 39,700	39,700 - 39,900
Woodfree uncoated, 100 g/m ² (232/233)	40,000 - 40,200	39,800 - 40,000	40,000 - 40,200
Woodfree uncoated, 100 g/m ² (234/235)	40,300 - 40,500	40,100 - 40,300	40,300 - 40,500
Woodfree uncoated, 100 g/m ² (236/237)	40,600 - 40,800	40,400 - 40,600	40,600 - 40,800
Woodfree uncoated, 100 g/m ² (238/239)	40,900 - 41,100	40,700 - 40,900	40,900 - 41,100
Woodfree uncoated, 100 g/m ² (240/241)	41,200 - 41,400	41,000 - 41,200	41,200 - 41,400
Woodfree uncoated, 100 g/m ² (242/243)	41,500 - 41,700	41,300 - 41,500	41,500 - 41,700
Woodfree uncoated, 100 g/m ² (244/245)	41,800 - 42,000	41,600 - 41,800	41,800 - 42,000
Woodfree uncoated, 100 g/m ² (246/247)	42,100 - 42,300	41,900 - 42,100	42,100 - 42,300

Offset paper prices also rose markedly, although less than those for office paper. Market players reported that list prices for sheets were in the region of the €950/t mark.

Insiders say that demand for copy paper, in particular, is still lacklustre in Poland. Market players cited the introduction of the mandatory electronic invoicing system Krajowy System e-Faktur (KSeF) as the latest burden on fine paper demand in the Polish market. Companies have been required to process their B2B invoices via the state e-invoicing system since April 2026. With many firms switching to digital invoicing, demand for office and copy paper has taken an immediate and noticeable hit, market players said. Some contacts report a drop in orders of 20 to 30 per cent. At the same time, it is expected that this will be a one-off effect following the transition phase.

Competition with Asian suppliers remains an important issue, particularly in this segment. Experts estimate that Asian office paper now accounts for roughly 10 per cent of Polish imports, in some cases even more. Business is regarded as highly opportunistic. Traders who had placed their orders at the beginning of the year were still able to benefit from low purchase prices in the second quarter. In the meantime, however, the situation has changed significantly. Freight rates have more than doubled. At the same time, Chinese manufacturers have also increased their prices. This has eroded much of the price edge that Asian imports had. New orders from Asia are now considered much riskier than they were at the start of the year.

Looking ahead to the third quarter, market players largely anticipate stable prices for woodfree uncoated paper. At the same time, supply is expected to tighten in August because of scheduled, sometimes extended maintenance stoppages at two leading producers. Industry insiders see a real risk of delivery shortages emerging in September. Against this backdrop, several contacts regard additional price hikes from October as a distinct possibility.

Woodfree coated paper prices also edged higher in one or two instalments in the second quarter. Mark-ups in Poland reached at least €50/t, depending on the producer and customer, with some figures going up to €80-100/t.

Sheet and reel prices climbed by similar amounts, although producers reported somewhat stronger resistance to hikes for sheets, with the reels business proving to be stronger than for sheets. After a brief transition phase, higher prices have become established on the market. Insiders are now often quoting prices of around €1,000 for sheets. Sources said that reels cost about €50/t in most cases, although differences can vary markedly, depending on the customer in question.

After a strong March and April, demand for coated fine paper cooled in May and June, suppliers said. Market players primarily attributed this to buying being brought forward ahead of price increases and to seasonal effects.

Market players expect the third quarter to bring steady prices for woodfree uncoated paper grades, as well, with no additional hikes on the cards as things stand. Producers' initial goal was to hold on to the price increases instituted this spring. Coated fine paper grades remain readily available, sources said, adding that short-notice deliveries could also be arranged without difficulty.

More scope for additional price increases in newsprint business

By mid-July, negotiations on prices and terms for the third quarter had still not been fully concluded on the Polish publication paper market. Market players feel that many buyers are in no immediate rush to close deals at the moment. Sources pointed out that demand for paper was seasonally weaker during the summer holidays, and many key contacts were away or only reachable to a limited extent. Moreover, a large number of customers had replenished their stocks at second-quarter prices before increases were announced, so they were still sitting on comfortable inventory levels.

EUWID sources noted that the newsprint market is presently experiencing a more favourable balance between supply and demand than the magazine paper segment and offering better opportunities for producers to raise their prices. Paper machines were operating at high to very high capacity utilisation, with solid order books for the next few weeks. Among other reasons, manufacturers attributed the high workloads to downgrading effects from the magazine paper business. In addition, the closure of the Vipap Videm paper mill in Slovenia had, to the surprise of some, squeezed supply more than initially expected in Central and Eastern Europe.

In light of this situation, newsprint manufacturers had unveiled plans to tack on up to €50/t. In the end, the increases agreed were more modest, depending on whether, and to what extent, mills had already pushed through mark-ups in the second quarter. In most instances, the settlements landed in a corridor of €20-40/t.

Market players told EUWID, unlike in Germany, for instance, manufacturers are not pursuing separate pricing strategies for heatset and coldset newsprint in Poland. Insiders pointed out that the market was strongly driven by price, so attempts to differentiate between these two grades would be difficult to implement.

The situation is proving more challenging for magazine and catalogue paper than for newsprint. In advance of price hikes announced for the second quarter, many printing companies had brought forward their orders into March and April. Order volumes were correspondingly weaker in May and June as a result. Compounding matters, business tends to be slower during the summer months. For the third quarter, companies are discussing either flat prices or small additional increases for magazine paper, depending on grade, supplier and how much prices have already increased in the first half of the year. Substantial shifts in prices are currently deemed to be rather unlikely.

For SC paper grades, the two sides largely negotiated price hikes of €10-20/t in the third quarter. However, the scope for additional mark-ups is considered limited since demand remains subdued.

Producers mostly secured mark-ups of €30-40/t for LWC in the second quarter. For the third quarter, suppliers are eyeing plans ranging from unchanged terms to smaller additional rises. A second, larger round of increases initially considered by a few manufacturers did not materialise after competitors failed to follow suit. Agreements currently being concluded in many cases already form the basis for fourth-quarter pricing.

The structural decline in demand on the Polish publication market continued in the first half of the year. According to data from the Polish circulation audit (PBC), the average paid circulation of nationwide daily newspapers in the first quarter of 2026 was around 13 per cent below the level recorded in the same period last year. EUWID sources in the paper industry do not regard this as a significant change compared with past years, noting that the main shake-out in press products had already taken place. While the newspaper segment now accounts for only a relatively small share of the market, the magazine segment is still viewed as comparatively stable.

Gap between kraftliner and recycled containerboard prices widens

Prices for recycled containerboard and kraftliner moved in opposite directions in the second quarter. While prices for recycled corrugated case material stabilised following sharp increases in the spring, brown kraftliner recorded another substantial rise. As a result, the price gap between kraftliner and recycled grades widened further, reaching what market sources describe as an unusually high level.

Prices for recycled corrugated case material remained unchanged through the end of the second quarter after rising in March and April. Producers initially implemented increases of €40/t in March and a further €60/t in April, followed by a comparatively quiet market in May and June.

Isolated attempts to push through additional increases in June failed to gain sufficient support from other suppliers. Prices therefore rose by a total of €100/t in the first half of the year, recouping most of the reductions recorded in the second half of 2025. Even so, prices remain below the peaks recorded last year.

White-top testliner prices were also left untouched in the second quarter after climbing by €40/t in April.

A few Polish corrugated board producers reportedly sought price reductions for recycled corrugated case material for the summer months. Paper mills turned down these requests, citing continued healthy capacity utilisation as well as persistent cost and margin pressures. Prices therefore held steady in June and are likewise expected to remain unchanged in July.

It remained unclear at the time of reporting whether softer order books might prompt some producers to grant concessions in August. From the paper industry's perspective, granting concessions over the summer would risk eroding the margin gains achieved in recent months, particularly given persistently high energy and logistics costs and a slight increase in recovered paper prices.

Another factor to support paper mills' efforts to defend prices is the availability of export orders booked at the start of the year. These shipments were postponed because demand in Europe proved sufficient and stronger than expected. Should European demand weaken seasonally in the coming weeks, producers hope that the deferred volumes could be redirected to export markets, thereby easing pressure on prices in Europe.

The market for brown kraftliner has been more dynamic of late. Following a €60/t hike in April, key suppliers implemented a further €60/t increase in Poland in mid-June, taking the total increase since January to €120/t. Unlike recycled grades, kraftliner prices have therefore risen above the levels recorded in summer 2025.

White-top kraftliner prices also increased, with producers implementing hikes of €40/t in both April and mid-June.

Converters told EUWID that negotiations with kraftliner suppliers had been exceptionally one-sided. Paper manufacturers clearly held the upper hand, supported by healthy order books and relatively tight global kraftliner supply. Several market players said that they were even relieved that the increase was ultimately limited to €60/t rather than the €80/t discussed at an earlier stage.

The gap between kraftliner and testliner prices on the Polish market has become even wider after the latest hikes and is now well above the long-term average of around €200.

Experts therefore expect packaging manufacturers to scrutinise even more closely whether kraftliner is genuinely needed or can be replaced by recycled grades. From the paper industry's perspective, however, a much stronger shift towards substitution could become problematic, as fresh fibre is essential to keep the paper recycling loop running properly.

Despite the tighter market situation, converters reported no problems securing kraftliner. Contracted volumes were arriving on schedule, with no signs of longer lead times or precautionary stockbuilding, respondents in the Polish market told EUWID.

Corrugated board market continues to grow in the second quarter

The Polish corrugated board and packaging market maintained its strong performance in the second quarter, continuing to outperform many other European markets. Market sources said that several producers recorded significantly higher sales volumes in the first half of 2026 than in the same period last year. Companies also report good order books for July. Official market data shows growth of around 3 to 3.5 per cent for Poland up to and including May.

That said, the second quarter was not quite as buoyant as the start of the year for all producers. Several corrugated board and packaging companies reported lower order intake than in the first quarter, although business remained positive overall.

Market players interviewed by EUWID remained cautiously optimistic about market outlook for the summer. While order books for July were widely described as good, August is expected to prove more challenging. Sources said the market's ability to maintain its positive momentum beyond the summer would depend largely on the strength of demand in the autumn.

Notwithstanding the positive trend in demand, the Polish corrugated board market is still suffering from surplus capacity of around 30 per cent, according to insiders. Although growth is improving capacity utilisation at many mills, it is nowhere near enough to absorb the surplus. According to contacts, the market for corrugated case material now appears much more balanced than the Polish corrugated board industry itself.

FBB price increases dragging on into Q3

The mark-ups announced for GC board (folding boxboard, FBB) in March or during the second quarter have so far been implemented only partially and with considerable delays in Poland. All relevant European manufacturers announced energy surcharges or hikes following the outbreak of the war in Iran. However, several producers responded relatively slowly, enabling some Polish converters and buyers to continue sourcing GC board at unchanged prices until 1 July.

Suppliers adopted different approaches to the price adjustments. Several Scandinavian producers mainly applied energy or transport surcharges, typically of around €30/t, while a major Polish supplier of fresh-fibre cartonboard raised its list prices by roughly €40/t. The timing of the increases varied depending on customer and contract structures.

Some converters reported being charged the higher prices for deliveries in June, while other folding carton producers and merchants said the increases did not take full effect until July. Implementation dates varied partly because transitional arrangements applied to orders placed before the price increases were announced.

Several contacts described the first half of the year as very challenging for Europe's GC producers, even though demand in Poland was reasonably healthy. Weak consumption across Europe and substantial oversupply forced many mills to absorb higher costs for weeks. The impact of higher costs varied by producer, with Central European players in particular suffering from markedly higher energy burdens due to the lack of in-house generation capacity. Nonetheless, pushing these costs through to customers was extremely difficult, as mills feared losing volumes. Ongoing pressure from Asian GC imports narrowed their pricing leeway even further.

The energy and transport surcharges now in place are increasingly under scrutiny. For a few weeks now, customers have been pressing for greater clarity on when and under what conditions these surcharges will be withdrawn. Market players said board mills were already discussing the issue internally, but no formal decision or communication had been issued by early July. Suppliers, however, stressed that the surcharges themselves had only been introduced after a significant delay.

Price increases for GD board (white-lined chipboard, WLC) were implemented more smoothly and more consistently than in the GC segment. Most producers largely pushed through their demands from April or May onwards, with increases typically amounting to €30/t, depending on supplier and customer. Although a few converters were able to secure existing prices until the end of June, producers regard the latest round of price talks on the Polish market as largely successful.

Following a solid first quarter, demand began to lose some momentum in April or early May. Board suppliers largely attributed the slowdown to high stock levels at converters, many of which had brought purchases forward following the initial price announcements in an effort to avoid the second-quarter increases. At the same time, a few players had been bracing for a second round of increases following the outbreak of the Iran war, as energy and transport costs climbed. Demand was also affected by numerous public holidays in spring and a persistently cautious consumer sentiment.

Sources expect prices to remain broadly stable over the summer. Competition remains intense, with some suppliers continuing to offer comparatively low prices. Regular summer downtime at several cartonboard mills should help bring the market back into better balance and curb further pressure to sell. At the same time, several producers noted in conversations with EUWID that demand in Poland continues to outpace many other European markets.

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Mailway acquires Derwent Displays out of administration

13 July 2026 | [Frauke Schmidt](#) | 🕒 ~ 1 min | [Published in issue 29/2026](#)

UK packaging and fulfilment company Mailway

Packaging Group has acquired the business of point-of-sale (POS) display manufacturer Derwent Displays out of administration. The transaction was completed on 9 July, according to Derwent's joint administrators Ben Fallon and Louise Longley of restructuring firm BTG. Financial details were not disclosed.



Derwent will continue operations under the name Mailway Displays.

The administrators said that Derwent Displays had experienced cash-flow pressures and that an accelerated sales process was launched before the administration to find an investor or buyer for the business.

They added that operations will continue at Derwent's manufacturing facility in Denby, Derbyshire, under the name Mailway Displays. The company will also continue to fulfil existing customer orders. All 33 employees will be retained.

Derwent Displays designs and manufactures temporary POS displays and bespoke retail packaging and also provides fulfilment services. The business was founded as a family-owned company in 1994 and was acquired by its management team in 2023.

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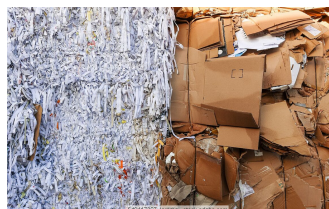
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Polish recovered paper market sees moderate price hikes for supermarket paper and board in Q2

Transport costs and periods of stronger demand underpinning the market

📌 **EUWID +** 13 July 2026 | [Karolina Utracki](#) | ⌚ ~ 4 min

Following a largely quiet start to the year, activity picked up again in the Polish recovered paper market during the second quarter. Unlike last year, when occasional raw material shortages led to sharp price hikes, the market conditions remained orderly. Prices for supermarket paper



and board (1.04) have edged higher over recent months in a series of moderate increases, without a repeat of the turbulence seen in spring 2025. Market players told EUWID that the domestic upturn was chiefly being driven by higher transport costs, a spell of stronger demand from packaging paper mills and spillover effects from neighbouring countries. At the beginning of July, it looked as though Polish recovered paper prices might continue to climb during the month.

Recovered paper merchants and converters said that Polish supermarket paper and board prices rose by €10-15/t in most cases in May, with prices more rarely climbing by up to €20/t. As a result, prices for 1.04 have now risen to over €100/t on a free-delivered basis.

Merchants said that paper mills in Poland and neighbouring countries had somewhat stronger demand for recovered paper in the second quarter than in the previous three months. The improvement in demand is said to have come primarily from recycled corrugated case material producers, supported by stronger order books and more stable production with fewer downtime periods. By June, demand had reportedly returned to normal levels. All things considered, both merchants and buyers said that the market was much quieter than last year when short-lived raw material shortages led to much greater price volatility.

Transport costs still the biggest price driver

Insiders continue to cite transport costs as the main price driver, whether directly or indirectly. Recovered paper merchants report that freight rates are now about 25 per cent higher than last year and roughly double what they were three years ago. Besides more expensive diesel, higher road tolls in Poland and surrounding countries are said to have added significantly to transport costs.

As a result, paper mills continue to pay fuel surcharges of up to €5/t on recovered paper deliveries. Even though diesel prices had fallen slightly in June, observers saw little reason for cutting surcharges while the situation remained so volatile due to the uncertainty caused by the war in Iran. Merchants also point to even scarcer haulage capacity during the summer holiday period and the ongoing shortage of available lorries.

Insiders told EUWID that the amount of mixed paper (1.02) and supermarket paper and board collected in Poland had subsided a little with the start of the summer. Converters felt that recovered paper was a little harder to come by at the start of the holiday season, while some mills have reportedly trimmed output a little in June after a stronger May. Sources largely regard Polish paper mills' recovered paper stocks as adequate, but by no means consistently comfortable. Overall, supply and demand were broadly in equilibrium.

According to market participants, a major fire at a key Polish recovered paper company in late April had not had any meaningful impact on the market even though the facility sustained significant damage.

As of early July, it was still unclear whether individual paper mills in Poland would raise their purchasing prices again slightly in July. In a few cases, there was talk on the market that prices might climb by PLN20-30/t. Merchants said that supermarket paper and board, in particular, is more sought-after than mixed paper. For their part, customers in Germany had already opted to leave prices untouched, Polish sellers said.

Exports were also stable in the second quarter. Market players told EUWID that both shipments to Germany and exports to Ukraine and the Far East continued largely unchanged. That being said, a few merchants consider it possible that higher recovered paper prices in Poland might lead to more recovered paper staying on the domestic market and less being exported to Germany in the weeks ahead.

Deinking grades stable

While supermarket paper and board became more expensive, the market for deinking grades stayed the same in the second quarter. Merchants reported generally subdued demand, with one of the largest foreign buyers in particular purchasing only limited volumes.

Insiders noted that this meant that there had not been any significant buying pressure or stimulus on prices. As June drew to a close, sorted graphic paper for deinking (1.11) was largely quoted at €190-200/t free delivered.

Prices for high white recovered paper grades also remained stable after falling last year. The upward trajectory in pulp costs has apparently not had major knock-on effects for substitute grades. Recovered paper merchants surveyed by EUWID said that neither supply nor demand is providing any real momentum for short-term price changes.

EUWID Price Watch Recovered Paper Poland			
Second quarter 2026			
Prices in PLN/€ per tonne free delivered	Second quarter 2026	First quarter 2026	Second quarter 2025
Supermarket corrugated paper/board in PLN/t (1.04)	400 - 500	400 - 450	610 - 740
Supermarket corrugated paper/board in €/t (1.04)	93 - 116	93 - 105	144 - 175
New shavings of corrugated board in PLN/t (4.01)	425 - 525	425 - 475	650 - 780
New shavings of corrugated board in €/t (4.01)	99 - 122	99 - 111	153 - 184
Sorted graphic paper for deinking in PLN/t (1.11)	800 - 900	800 - 900	800 - 850
Sorted graphic paper for deinking in €/t (1.11)	186 - 209	187 - 210	189 - 200
White woodfree uncoated shavings in PLN/t (3.18.01)	2,025 - 2,075	2,025 - 2,075	2,100 - 2,150

White woodfree uncoated snavings in €/t (3.18.01)	4/0 - 482	4/2 - 484	494 - 506
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Exchange rate as of 10 July 2026: 1 PLN = €0.2322

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Woodberry Packaging buys Medica and Curtis

10 July 2026 | [Frauke Schmidt](#) | 🕒 ~ 1 min | [Published in issue 29/2026](#)

Woodberry Packaging Group has acquired UK folding carton manufacturers Medica Packaging and F.G. Curtis, significantly expanding its presence in pharmaceutical, healthcare and personal care packaging.



The transactions will almost double the size of the group, which will now employ around 650 people compared with roughly 350 staff before the transaction. Combined turnover of the combined businesses will exceed €120m, according to the company. Financial details were not disclosed.

Medica, based in Crewe, is described as the UK's largest independent manufacturer of folding cartons for the pharmaceutical industry. The company produces folding cartons and patient information leaflets for pharmaceutical, healthcare and medical technology customers.

F.G. Curtis, which trades as Curtis Packaging, manufactures folding cartons mainly for the cosmetics and personal care sectors, with additional activities in healthcare packaging. The company has been [part of Medica](#) since 2022.

Dublin-based Woodberry said both businesses would continue to operate under their existing brands and management teams. The company also stressed that existing staff, customer relationships and supplier links would be retained.

Reelvision, Woodberry's existing UK business, produces folding cartons, sleeves, wallets and shelf-ready packaging for customers in sectors including pharmaceuticals, healthcare, cosmetics and veterinary products.

Woodberry Packaging is backed by Dublin-based Woodberry Capital and has expanded through acquisitions in Ireland and the UK in recent years.

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IP temporarily suspends production at Pine Hill mill

10 July 2026 | 🕒 ~ 1 min | [Published in issue 29/2026](#)

International Paper (IP) has temporarily suspended production at its Pine Hill containerboard mill in Alabama "after a weather event damaged a critical roof" at the site.



The company said the measure had been taken proactively and as a precaution to ensure the safety of employees and contractors.

IP did not specify the nature or timing of the weather event. Local weather reports show that severe thunderstorms moved through parts of south-western Alabama in early July, including the Pine Hill area.

The group is currently assessing the repair work required. Based on the information available so far, International Paper expects manufacturing operations at Pine Hill to resume in August.

It was also working closely with customers to manage any potential impact from the temporary outage, IP said without providing details on the extent of the damage or the likely volume of lost production.

International Paper's Pine Hill mill operates two paper machines. According to a permit renewal application, the machines have a combined design capacity to produce roughly 1 million t of kraftliner and semi-chemical fluting.

This article was updated on 13 July 2026 to include the facility's capacity.

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Major fire at German cores producer Merker

09 July 2026 | [Noureddine Guimouza](#) | 🕒 ~ 1 min | Published in issue 29/2026

A major fire has severely damaged a warehouse at the mill of German cores producer Merker in Oranienburg. The fire broke out on Sunday, 5 July and was not fully extinguished until the early hours of Wednesday 8 July.



On 5 July, firefighters were called out to a fire on the premises of cores producer Merker.

According to the firefighters, the middle hall of the site was completely destroyed, while the flames were prevented from spreading to the two adjacent buildings. Firefighting operations proved difficult due to the materials stored in the building. According to the city of Oranienburg, the warehouse contained paper and a photovoltaic system was installed on the roof.

The police estimates the damage caused by the fire at several million euros. The exact cause of the fire remains under investigation.

Merker is a medium-sized family-owned company, which produces paper cores for several applications such as paper, films, adhesive tapes, textiles, cables as well as cores for packaging and other industrial uses.

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La Rochette cites progress with return to positive Ebitda

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French cartonboard producer La Rochette

Cartonboard has reported progress in its efforts to strengthen the business. The company said that its three-year strategic plan "Towards new heights" launched in April 2025 was progressing as planned and had already delivered initial encouraging results. The company had been able to return to a positive Ebitda in 2025, it wrote in a statement.



La Rochette emphasised that it continued to receive support from public authorities and its owner Mutares to strengthen its financial position and implement the strategic plan. Mutares has reportedly waived claims dating from 2024, thereby strengthening the company's equity base. At the same time, La Rochette is working with external financial partners to reinforce its financial structure and secure financing for its transformation and investment plan.

The company also pointed to some milestones achieved. It has obtained ISO 22000 certification, an international standard for ensuring food safety: This could open up new market opportunities, the company said. In addition, La Rochette plans to join the Science Based Targets initiative (SBTi) later this year as part of its sustainability strategy to reduce its CO₂ emissions.

"Securing our financing for the next three years is key to fostering growth, transformation and investment. We need everyone's support to continue developing our partnerships and pursuing our shared ambitions. In 2026, together we will reach new heights," commented Béatrice Jacquet, who is responsible for the transformation project.

La Rochette is part of German investment company Mutares, which acquired the mill from Reno de Medici in 2021. The company produces fresh fibre-based cartonboard (folding boxboard) primarily for packaging used in the food, pharmaceutical and cosmetics industries. The mill has a production capacity of 165,000 tpy of GC 1 and GC 2 and employs 280 people.

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