

DS Smith starts up Andritz stock preparation line at Porcari mill

14 July 2026 [Frauke Schmidt](#)

DS Smith has started up a new stock preparation line and reject treatment system supplied by Andritz at its mill in Porcari, Italy. The system has a design capacity of 1,650 tpd and can process a wide range of recovered paper grades.

The line includes what Andritz describes as Europe's largest FibreFlow drum pulper. Andritz says the unit combines gentle pulping with the removal of coarse contaminants.

The stock preparation line forms part of a new production system for a 450,000 tpy containerboard machine, which is scheduled to [start operating in the fourth quarter of 2026](#). The machine will produce lightweight containerboard in basis weights of 70–135 g/m² from 100 per cent recycled fibre.

The new machine will replace PM 1, which has a capacity of up to 175,000 tpy of recycled corrugated case material and [was decommissioned in December 2025](#). DS Smith also operates PM 2 at the Porcari mill, with a design capacity of 235,000 tpy.



Teams from DS Smith and Andritz following the successful start-up of the stock preparation line featuring Europe's largest FibreFlow drum pulper at DS Smith's Porcari mill in Italy

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Nippon Paper mill in Japan down after earthquake, nine fatalities confirmed

EUWID + 29 July 2026 Valeria Buß

This article was updated on 3 August

Nippon Paper's Yatsushiro paper mill in southwestern Japan is currently down following the severe earthquake that struck the region on the morning of 28 July. A magnitude 7.1 earthquake hit the Kumamoto prefecture, causing 35 fatalities and numerous injuries, according to a government report issued on 31 July. Workers at the Nippon Paper mill are among those affected.



File photo

Various media outlets reported that the earthquake caused a chimney at the paper mill site to collapse. Nippon Paper said that eleven people had been trapped inside the plant building. Two people were rescued alive, while the remaining nine lost their lives in the accident.

Production at the Yatsushiro mill has been suspended, and the extent of the damage is currently being assessed. The company is using existing inventories to supply customers and plans to secure supply through other Nippon Paper mills, if necessary. Nippon Paper said that the impact on its business performance was being evaluated and that further information would be disclosed in due time.

The Yatsushiro plant produces newsprint as well as fine papers. As part of its measures to reduce printing and writing paper capacity, the company shut down a newsprint machine in November 2025. In addition, Nippon Paper plans to start producing household paper at the site in the medium term.

Pulp and cartonboard production at US mill remains suspended after accident

Nippon Paper was recently affected by another tragic incident involving multiple fatalities in the USA. On 26 May, a serious chemical accident occurred at Nippon Dynawave Packaging in Longview, Washington when a white liquor tank collapsed. Eleven people were killed in the accident. Operations at the site were immediately suspended following the incident.

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Nippon Paper last provided an update on 24 June. At that time, the company said that production in Longview remained suspended. No severe damage had been confirmed to major equipment such as pulp production machinery, boilers, paper machines and extruders.

At the Longview site, Nippon Paper produces liquid packaging board with a capacity of 280,000 tpy, as well as NBSK market pulp. The site's total NBSK capacity is put at around 355,000 tpy.

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Paranova to start up new plant for fibre-based packaging in Godmanchester

30 July 2026 [Frauke Schmidt](#)

Paranova Print and Packaging plans to invest £20m over the next five years in the expansion of its fibre-based packaging operations in the UK.

The programme will begin with an investment of around £6m in a new purpose-built facility in Godmanchester, Cambridgeshire, which is scheduled to open in November 2026.



The 9,000 m² site will include production and warehousing areas as well as office and research and development functions. Paranova Print and Packaging (Paranova) said the plant would be designed to provide shorter lead times, greater production flexibility and faster speed to market.

Following the initial £6m investment, the business plans to commit a further £14m to additional press and finishing equipment, as well as a fully automated logistics system. Once fully operational, the site is expected to support a headcount of 150 employees.

Godmanchester will be Paranova's fourth and largest fibre-based packaging facility in the UK. The company expects the site to increase its paperboard packaging capacity and support growing demand from the fresh produce, convenience food and food-to-go sectors. The operation is also intended to accommodate variable order forecasts and customers' transition from plastic to paper-based packaging.

The announcement follows the completion of a £5m expansion at Paranova's food-to-go packaging plant in nearby St Neots. The project added 2,000 m² of production space and tripled capacity at the site. The company added new equipment for the production of lined-board food-to-go packaging, including sandwich skillets, wrap boxes, trays and folding cartons.

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Paranova supplies packaging to the food, household and personal-care markets in the UK and continental Europe. Its portfolio includes cartons, lined-board packaging, trays and self-adhesive and linerless labels. The business was founded as Paragon Print and Packaging in 1994 and subsequently [operated as Coveris' Business Unit Paper before being acquired by Kingswood Capital Management in April and renamed Paranova Print and Packaging.](#)

Jo Ormrod, CEO at Paranova Print and Packaging, said: "This investment marks another major milestone in Paranova's growth and underlines our long-term commitment to the future of fibre-based packaging. Godmanchester has been purpose-built to help us meet the increasing pace and complexity our customers require, particularly across fresh produce, convenience and food-to-go. By investing in next-generation print and finishing technology, we are creating a manufacturing environment that supports shorter lead times, greater flexibility and faster speed to market. As our largest fibre-based facility to date, the new site gives us the scale to support further expansion while continuing to help customers transition towards paper-based packaging solutions."

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Lenzing sharpens focus on nonwovens, phases out production at two sites in Austria and UK

EUWID+ 31 July 2026

Austria's speciality fibre and pulp producer Lenzing has announced plans to press ahead with its strategic transformation, with a stronger focus on nonwoven applications. The company intends to expand its nonwovens business significantly by 2030 while realigning its textile fibre operations. The transformation is to be accompanied by a comprehensive refinancing package including a fully underwritten capital increase of up to €300m.



Lenzing's lyocell fibre plant in Heiligenkreuz, Austria, is one of the two sites where production is to be phased out.

As part of the restructuring, Lenzing plans to phase out fibre production at its Heiligenkreuz site in Austria by the end of 2026, followed by its Grimsby site in the UK by the end of 2027. Speciality fibre production is to be transferred to the group's core manufacturing sites. At the same time, the sales process for the Indonesian viscose fibre site PT South Pacific Viscose is continuing.

These measures are expected to result in impairments of up to €150m on non-current assets in 2026, reducing Ebit and group net profit but leaving Ebitda unaffected. Restructuring provisions of up to €40m, mainly related to personnel measures, are expected to have a negative impact on Ebitda in 2026, the company said.

According to Lenzing, the Heiligenkreuz site has a nominal capacity of 90,000 tpy of lyocell fibres and supplies fibre solutions for a wide range of textile and nonwoven applications. Grimsby also produces lyocell fibres and has a nominal capacity of 45,000 tpy.

Lenzing said it was examining "strategic options for the affected sites, including a possible sale or other value-preserving solutions". Should no viable solution be found, the company intends to wind down production in a "structured and orderly manner".

According to media reports, the two sites employ around 500 people in total. Lenzing plans to cut a total of 2,000 jobs worldwide by the end of 2027.

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As part of its "Grow Nonwovens, Reset Textiles" strategy programme, Lenzing also said that pulp and biorefinery products would remain a central pillar of the group. "Capacity debottlenecking in Brazil and Austria, together with operational improvements and energy optimisation, are intended to further strengthen this profitable division and its contribution to the group," Lenzing said.

Suzano and B&C Group support transformation and refinancing

The planned transformation is to be supported by a comprehensive refinancing package aimed at strengthening the group's financial structure. The package includes new financing agreements totalling up to €300m and an extension of the maturity of existing debt to 2030. The refinancing is conditional on the completion of a €300m capital increase.

The proposal for the capital increase is to be submitted to shareholders at an extraordinary general meeting in the final week of August. The transaction will be carried out with subscription rights and at a discount to the market price, with existing Lenzing shareholders receiving subscription rights in proportion to their current holdings.

"The syndicate formed by B&C Group and Suzano, which together indirectly holds approximately 52.25 per cent of Lenzing's share capital, has, subject to customary conditions, irrevocably committed to participate in the capital increase by investing up to €156.7m," Lenzing said.

Oberbank AG has also committed to participate in the capital increase in line with its 3.86 per cent shareholding, investing up to approximately €11.6m, the company added.

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Duino containerboard mill impairment weighs on Mondi's half-year results

31 July 2026 Igor Dugandžić

Mondi recognised substantial special item charges relating to asset impairments in its 2026 half-year results. The largest item concerned the Duino recycled containerboard mill in Italy.

Mondi has reduced the carrying value of its paper mill in Duino, Italy, by €206m. The group attributed the impairment to a weaker margin environment, weaker market conditions and lower expected returns from the site.



Since acquiring the mill from Burgo in 2023 and committing to the expansion project, market conditions had changed materially, Mondi said. The group cited prolonged weak market growth, industry overcapacity, trade barriers imposed on key export markets and higher energy costs. These factors had adversely affected the expected returns from the mill. The lower returns profile now anticipated no longer supported the asset's previous carrying value.

The Duino paper mill started up at the end of April 2025 and, once fully ramped up, will have an annual production capacity of 420,000 t of recycled corrugated case material. Although the mill is now expected to generate lower returns than previously anticipated, Mondi said the ramp-up was proceeding in line with plan and that it remained confident in Duino's long-term future.

The impairment recognised for the Duino recycled containerboard mill was the largest individual item within the special charges booked in the first half. Special item charges before tax totalled €320m, comprising €296m of non-cash impairment charges and €24m of restructuring and closure costs.

In addition to the Duino mill, Mondi recognised impairment charges of €39m relating to the uncoated fine paper operations at the Neusiedler mill in Austria and €31m relating to the Schwarzenberg solidboard mill in Germany. A further €20m of impairments primarily concerned the Stambolijski mill in Bulgaria, which ceased operations in 2024.

Mondi reports first-half loss

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The substantial special charges weighed heavily on Mondi's reported results for the first half of 2026. Including the €320m of special items, the group recorded an operating loss of €178m and a net loss for the period of €243m.

Nevertheless, Mondi highlighted a number of positive developments in its operating performance. Higher input costs and lower average selling prices put pressure on margins, but this was partly offset by higher sales volumes and pricing actions. Mondi's sales rose by 2 per cent to €3.98bn in the first half of 2026. The increase, however, was driven mainly by the contribution from the acquired Schumacher Packaging plants, while higher organic sales volumes were offset by lower average selling prices.

Cash generated from operations declined to €347m from €416m in the corresponding period. Mondi said a strong focus on working-capital management had mitigated the effect of lower earnings. Total working capital was €122m lower year on year at €1.295bn at the end of June.

According to the group, trading momentum improved through the first half. Mondi entered the second half with higher packaging paper prices, supported by good order books. At the same time, the company expects higher wood costs across Central and Eastern Europe and continues to manage volatile energy-related input costs.

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Mondi results		
million €	January-June	
	2026	2025
Key figures		
Sales	3,975	3,909
EBITDA	355	539
Operating result	-178	303
Net result	-243	193
Business area review		
Corrugated Packaging		
Sales	1,977	1,893
Underlying operating result	14	155
Production		
Containerboard (1,000 t)	1,430	1,302
Corrugated solutions (million m ²)	1,277	1,118
Uncoated Fine Paper (1,000 t)	476	467
Market pulp (1,000 t)	340	357
Flexible Packaging		
Sales	2,022	2,044
Underlying operating result	148	195
Production		
Kraft paper (1,000 t)	652	629
Paper bags (million units)	3,008	2,961
Consumer flexibles (million m ²)	891	939
Functional papers and films (million m ²)	1,576	1,609
Sales: Mondi		

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Court rejects Pigasse takeover offer for Fibre Excellence, Provence pulp mill to be liquidated

EUWID + 03 August 2026 Valeria Buß



Fibre Excellence's Provence pulp mill will not resume operations anymore

The commercial court of Toulouse has rejected the takeover offer for French pulp manufacturer Fibre Excellence submitted by investment banker Matthieu Pigasse. Fibre Excellence told EUWID that the court considered the offer submitted by Combat Holding, the company founded by Mr Pigasse, to be invalid. The takeover conditions, which were linked to government commitments, had not been fulfilled, it explained. The bidder has therefore

been definitively ruled out.

This decision spells the end for at least one of Fibre Excellence's two pulp mills. In the absence of a takeover offer, liquidation without continuation of operations had been requested for the Fibre Excellence Provence site in Tarascon as well as the parent company Fibre Excellence SAS, the company said, adding that it was not authorised to provide further details. The Filpac CGT trade union and several local media outlets reported that the Provence mill was placed into liquidation on 29 July.

The Provence mill has a production capacity of 220,000 tpy of unbleached softwood kraft pulp. According to reports, the closure will result in the loss of around 270 jobs.

New offer for Saint-Gaudens

There is still hope for the Saint-Gaudens site, though. An industrial group has reportedly expressed formal interest in acquiring the mill as well as its forestry-related subsidiaries Enviroforesterie and Sebso. Fibre Excellence said it had applied for liquidation proceedings with continuation of business operations for these entities. According to media reports, this procedure was officially ordered on 30 July.

The potential buyer, whose plans are not yet known, has until the end of the month to submit a concrete offer. The court would review the proposal at the end of August, Fibre Excellence told EUWID. The decision regarding this site has therefore been postponed.

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The Saint-Gaudens mill can produce up to 280,000 tpy of bleached softwood and hardwood pulp and employs around 270 people.

Fibre Excellence has been in receivership since 27 April. Production at both the Tarascon and Saint-Gaudens mills has been at a standstill ever since. But the company's problems had already become apparent at the end of last year. The situation escalated in February, when the company and regional authorities launched an intensive search for solutions to preserve the mills and more than 500 jobs.

However, these efforts repeatedly reached a dead end because government support was required, while no agreement could be reached with the state on the conditions attached to such support. Fibre Excellence, and later the takeover candidate, called, among other things, for an adjustment of the state-regulated feed-in tariff for biomass energy. Most recently, Fibre Excellence's management had attempted a takeover itself but withdrew in favour of Matthieu Pigasse's offer, which has now been rejected.

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Smurfit Westrock's Cellulose du Pin kraftliner mill up and running again

📄 EUWID + 04 August 2026 Valeria Buß



Smurfit Westrock's Factice mill produces kraftliner

Factice, where the Smurfit Westrock mill is located.

According to the Gironde departmental authorities, Biganos was evacuated on 26 July and all local facilities and businesses were ordered to close. The evacuation order and closures were lifted on 31 July.

The situation has since eased. French Interior Minister Laurent Nuñez said on 1 August that the fire had been brought under control and was no longer spreading, although it had not yet been fully extinguished.

The Cellulose du Pin mill produces brown and white-top kraftliner on two paper machines with a combined capacity of around 550,000 tpy.

Smurfit Westrock's Cellulose du Pin kraftliner mill in Factice, France, has resumed production. A company spokesperson told EUWID that operations, which had been suspended because of wildfires in the region, restarted on 1 August.

The departments of Gironde and Landes in southwestern France have been affected by large-scale wildfires over the past two weeks. Around 220,000 people were reportedly evacuated, including residents of the municipality of Biganos and its district of

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UK publication paper and kraftliner prices rise at the start of July

Palm Paper's PM conversion might bring about radical market changes

EUWID + 05 August 2026

One of the most frequently discussed topics in the UK paper market in recent weeks has been Palm Paper's plan to convert the newsprint paper machine at its King's Lynn mill to the production of recycled corrugated case material, as early as the first quarter of 2027. As a result, the UK will lose its last production facility for newsprint, with around 400,000 tpy of production capacity being withdrawn from the market, whilst at the same time substantial containerboard capacity will be added to UK market.

EUWID Price Watch UK				
July 2026				
Prices in £ per tonne free delivered unless otherwise stated	July 2026 £	July 2026 €*	June 2026 £	July 2025 £
Fine paper				
Woodfree uncoated				
Copy paper 80 g A4 B grade	790 - 860	924 - 1.006	790 - 860	790 - 860
Copy paper 80 g A4 C grade	740 - 830	866 - 971	740 - 830	750 - 830
Offset sheets 80 g	850 - 890	995 - 1.041	850 - 890	860 - 920
Offset reels 80 g	770 - 830	901 - 971	770 - 830	790 - 850
Woodfree coated				
Sheets, double coated, 115 g	870 - 940	1.018 - 1.100	870 - 940	870 - 940
Reels, double coated, 100 g	820 - 870	959 - 1.018	820 - 870	790 - 850
Publication paper				
Standard newsprint 45 g	510 - 540	597 - 632	500 - 530	480 - 510
Standard newsprint 42.5 g	520 - 550	608 - 644	510 - 540	490 - 520
Standard newsprint 40 g	530 - 560	620 - 655	520 - 550	500 - 530
Improved newsprint 52 g, ISO 68	560 - 590	655 - 690	550 - 580	530 - 560
LWC offset 60 g	690 - 720	807 - 842	690 - 720	660 - 700
SC offset 56 g (A)	590 - 610	690 - 714	590 - 610	580 - 610
Corrugated case material				
Primary fibre corrugated case material				
Unbleached kraftliner 175 g*, European quality	770 - 810	901 - 948	720 - 770	720 - 770
White-top kraftliner 140 g, European quality	865 - 945	1.012 - 1.106	835 - 910	805 - 875
Recycled corrugated case material				
Recycled fluting 100 g	585 - 655	684 - 766	585 - 655	555 - 605
Recycled fluting 90 g	585 - 660	684 - 772	585 - 660	555 - 610
Recycled fluting 85 g	595 - 670	696 - 784	595 - 670	565 - 620
Testliner II	605 - 675	708 - 790	605 - 675	575 - 625
Testliner III	585 - 655	684 - 766	585 - 655	555 - 605
White-top testliner, grade B, 140 g	675 - 725	790 - 848	675 - 725	660 - 720
Cartonboard				
GD II	600 - 670	702 - 784	600 - 670	620 - 690
GC II	880 - 1.030	1.030 - 1.205	880 - 1.030	930 - 1.010
* Exchange rate as of 31 July 2026: £1 = €1.17				
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Even before these plans were announced, prices for publication paper for deliveries from 1 July had been increased. For newsprint in particular, paper manufacturers are already signalling that, in anticipation of a balanced market, they intend to charge higher prices as early as the fourth quarter or, at the latest, by the start of 2027. Kraftliner producers implemented price increases from 1 July, following the upward trend on the European mainland. Prices for cartonboard remained largely stable in the UK in July. However, the production shutdown at the former Folbb mill in Eerbeek resulted in a redistribution of GC board volumes across the market. By contrast, the market for GD board continued to perform well. Producers of corrugated packaging and folding cartons are increasingly complaining about the administrative burden associated with the PPWR. According to market participants, users frequently demand compliance beyond the regulation's actual requirements, even where this is not stipulated in the legislation.

Prices for fine paper in July remain largely unchanged despite emerging price pressure

The market for woodfree coated and uncoated paper in the UK remained largely unchanged in terms of prices in July. Market insiders report that the implementation of the latest price increases was completed by June at the very latest. Manufacturers had issued various announcements regarding price increases, differing in number, scale and timing. The overall result of these price movements in the second quarter amounts to up to £50/t for woodfree coated paper

and up to £40/t for uncoated grades.

However, the market has shifted in recent weeks, with demand now being described as weaker. Just a few months ago, some manufacturers were still recording reasonable order intake, and delivery figures also indicated fairly stable demand. Currently, however, this appears to have given way to a pronounced summer slump. Some market players have suggested that this is a normal seasonal trend. Others see it as a consequence of the relatively stable market in the first few months of the year, which was characterised by orders brought forward in anticipation of the announced price increases.

As a result, prices have come under downward pressure at the end of the second quarter at the latest, and have remained under pressure for several weeks now. Market participants report summer discounts across the entire market. There is talk of a price war, particularly in the uncoated paper sector. One paper manufacturer reports having lost a major order to a competitor at what was supposedly already a relatively low price. Market insiders say that manufacturers of all origins are involved in this price competition. There is renewed hope that the fine paper market will pick up again in September once the holiday season is over.

On the supply side of the market, no major changes are in sight in Europe for the time being. Market players estimate that there is an annual overcapacity of one million tonnes in each of the coated and uncoated paper segments in Europe. The market for woodfree coated paper is most likely to see significant developments in the foreseeable future. If the planned joint venture between Sappi and UPM goes ahead, it will hold a market share of over 50 per cent in the European market for coated fine papers. The two companies have stated that, once the joint venture takes effect, they will reallocate production to the most efficient machines.

Prices for newsprint are rising, conversion at Palm Paper brings far-reaching changes

Following an increase in publication paper prices in the UK during the second quarter, further price rises were implemented in some cases at the half-year mark.

The market for newsprint is currently seeing the most activity. Prices had already been raised in quarterly contracts during the second quarter, and further price increases came into effect from 1 July. Overall, the price increase for standard 42.5 g newsprint amounts to £30-35/t, and in some cases where prices were low, even more. In many instances, prices following the increase now range from £520 to £550/t.

This followed controversial negotiations against the backdrop of a market considered to be relatively balanced compared with other publication paper segments. Market insiders report that the fact that Canadian suppliers, on average, demanded even steeper price increases than their European counterparts helped to secure higher prices. Canadian suppliers have indicated that, for them, the European market offers only comparatively low prices and that

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they are finding sufficient demand in the US and Asian markets.

The newsprint market in the UK and in Europe in general is set to change radically with the planned conversion of Palm Paper's newsprint machine in King's Lynn. Palm intends to produce newsprint there until the end of the year, after which the paper machine is to be converted within two to three months to produce recycled corrugated case material as early as March 2027. This move will see the last newsprint production facility in the UK disappear.

Annual demand for newsprint in the UK is estimated at 270,000-290,000 t for the current year, and Palm's paper machine has a production capacity of around 400,000 tpy. Once the paper machine ceases producing newsprint, demand in the UK will be met almost entirely through imports. Alongside the main supplier Palm Paper, Scandinavian paper mills and imports from Canada are currently the most important sources of supply. The remaining volumes are supplied by other mills in continental Europe.

Initial market reactions to the forthcoming loss of newsprint capacity are already evident: according to insiders, UPM is now also producing newsprint at its Caledonian Paper mill in Scotland, which has until now been primarily focused on LWC.

Above all, it is to be expected that the rebuild of the paper machine at Palm Paper will eliminate any overcapacity in newsprint across Europe. Against this backdrop, paper manufacturers might demand further price increases in the fourth quarter or, at the latest, during negotiations for prices effective from 1 January 2027.

Prices for magazine papers in the UK have also risen from July, though only in cases where they had not already been increased in the second quarter. SC papers have risen in price by an average of £20/t, whilst for LWC papers the increase could be as much as £30/t.

Market insiders report that demand for publication paper is in line with expectations. It is repeatedly reported that demand for magazine paper is falling more rapidly in the UK than on the European mainland.

Major changes in the magazine paper market are expected in the foreseeable future on the supply side. In the LWC market in particular, many market participants believe that measures to consolidate production capacity will be taken shortly after the joint venture between Sappi and UPM comes into effect. This, combined with a partial switch in production at UPM Caledonian Paper from LWC to newsprint, could lead to a significantly more balanced market.

Kraftliner prices rise, while price hike plans for recycled CCM have yet to gain traction

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Demand in the UK market for corrugated case material developed well to very well in July, according to paper manufacturers. Order intake and machine utilisation were high, while inventories declined, one supplier reported. Larger volumes of certain grades were not always available at very short notice. And supply was also occasionally hampered by logistical problems. In some cases, integrated paper and packaging producers therefore resorted to external purchases and swaps.

Other suppliers took a much more relaxed view of the situation. Paper manufacturers had adjusted production to demand, they said. Unexpectedly large or short-notice enquiries could therefore occasionally result in tight availability, but this was primarily a timing issue rather than a fundamental supply problem. Converters also reported that there had been no genuine shortages. "We got everything we needed without too much difficulty," one converter told EUWID.

Order intake also looks set to remain good in August. Despite the closure of Smurfit Westrock's paper mill in Birmingham at the end of July, no shortages are expected from this side. Customers had still been able to place orders with the mill for deliveries in August, sources said.

Prices for brown recycled corrugated case material and white-top testliner remained unchanged in July. There were no discussions about possible summer discounts, and any such debate may have been nipped in the bud by one supplier's announcement that it would raise prices for brown recycled containerboard by €80/t in mid-August. The possible increase was not a major topic in the UK market by the editorial deadline, as the market typically follows such price movements with a delay of around one month.

Kraftliner was readily available overall in July. Although market participants generally described supply as tighter, there had so far been no significant shortages. This could change if Smurfit Westrock's French kraftliner mill, which had to be evacuated because of wildfires in the region remained closed for an extended period, respondents said in the last week of July. On 1 August, however, kraftliner production at the site resumed. Respondents also said that the wildfires were severely restricting transport capacity in southern France. A marked weakening of demand in August could help inventories return to normal. Otherwise, supply shortages could emerge by September at the latest, insiders said.

However, traditional, pure primary fibre-based kraftliner accounts for a comparatively small share of the UK market. Many market participants use kraft-top liner or other substitute products instead. No current or imminent supply problems were reported for these grades at the end of July.

Against the backdrop of the generally tighter supply situation, suppliers were able to raise kraftliner prices in the UK market from 1 July. Brown kraftliner prices increased by £50/t, while prices for white-top kraftliner mostly rose by £35/t.

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A major topic in the containerboard market was the planned conversion of production at Palm's King's Lynn mill from newsprint to corrugated case material. Eren Paper's new mill in Shotton alone could, at full capacity utilisation, turn the UK market for corrugated case material from a net importer into a net exporter. The additional planned conversion of Palm Paper's newsprint machine in King's Lynn is likely to further increase the supply surplus in the UK market for corrugated case material. This is all the more significant given that UK converting capacity has tended to decline recently.

Despite the prospect of a substantially larger domestic supply, many converters intend to maintain a diversified supply base. There is therefore likely to remain a fundamental interest in imports of recycled corrugated case material.

Demand for corrugated sheets and packaging developed unevenly in July, as it had in previous months. Some manufacturers reported a slowdown in activity in July, while others remained busy. "Solid, but with no growth momentum," was how some manufacturer described the market situation.

The rise in paper prices prompted another round of announcements for corrugated board. The increases sought were mostly in the range of 5 to 6 per cent. However, not all suppliers had made corresponding demands. Depending on the individual customer and the previous price level, the increases had also been implemented only selectively.

Following the sometimes substantial price increases already achieved in the second quarter, significantly more packaging contracts are now being put out to tender again. "That is putting pressure on prices and fraying nerves," one market participant commented.

Longer lead times for GC 2, mood in the GD segment brightens

In retrospect, activity on the British cartonboard and cartons market turned out to be better than initially expected in the first half of 2026. Some of the market participants contacted by EUWID even reported good volume growth. Sales were solid in June and July in particular, and in some cases were even described as very good.

In addition to demand from the Christmas business and the ice cream segment, the strong performance of the British teams at the football World Cup may also have provided support: England finished third, while Scotland became the tournament's sentimental favourite for many. Together with the summer weather, this is likely to have generated additional demand linked to parties and barbecues, market participants told EUWID.

The usual seasonal slowdown is expected in August, however. Some market participants intend to use the quieter period to replenish inventories, which have recently been reduced significantly.

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On the market for folding boxboard (FBB), lead times for GC 2 board into the UK have lengthened to around eight weeks. Some mills quote up to ten weeks. Converters also reported problems with express deliveries, both within the UK and from continental Europe. High transport costs and limited freight capacity were said to be exacerbating the situation. British merchants with their own vehicle fleets or close relationships with logistics providers are benefiting from these conditions.

The production stoppage at the Dutch Eerbeek mill, an important GC supplier to the British market, prompted shifts in sourcing patterns. Numerous European producers sought to take over volumes previously supplied by the Eerbeek mill, in some cases by offering highly competitive prices. Once production resumes at the Eerbeek site, it remains to be seen whether the Dutch producer will be able to win these volumes back, market participants told EUWID.

Apart from such short-term transactions, GC 2 prices remained largely unchanged. Some buyers have reportedly succeeded in reducing the surcharges applied in Q2 from £35/t to £20/t. However, many suppliers had already been “very creative” when implementing the original increase, meaning that in some cases it existed only on paper, sources said. This would leave some leeway for further reductions, one buyer said.

Rising ocean freight rates forced Asian producers to raise their prices as well, often by a similar amount to the surcharges sought by European suppliers. As a result, the price gap between Asian and European cartonboard has narrowed further. Some buyers now consider the remaining price advantage too small to justify switching suppliers, particularly as the insolvency of Folbb has brought supply security back into focus for a number of converters. The requirements of the EU Deforestation Regulation (EUDR) and Packaging and Packaging Waste Regulation (PPWR) are also likely to give European producers additional advantages.

Following a drastic decline in volumes over the last few years, conditions on the white-lined chipboard (WLC) market have also improved considerably. Initial signs of a recovery had already emerged in previous months. One producer described the UK as currently the only European market showing good demand in GD board.

This is due to several factors, among them the PPWR, say some market players. Unlike the British EPR system, the regulation creates stronger incentives for the use of recycled products. Market participants reported in particular on larger orders in which primary fibre-based board made in Europe had been replaced by recycled board.

Delivery times for GD 2 board to the UK are generally three to four weeks, although they can reach up to eight weeks in individual cases. Prices remained largely unchanged in July, although some concessions were still reported.

The production stoppage at Eerbeek caused particularly severe disruption in the market for greaseproof barrier board grades. “It felt like the Covid period,” one supplier said. Lead times at some producers are now said to extend until the end of September. Customers ultimately received the grades they needed, but at significantly higher prices.

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Following the resumption of production at the Eerbeek mill at the end of July and given the mill's focus on barrier board grades, market participants are hoping for the supply situation to ease soon.

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UK key market data						
April 2026						
in tonnes	April			January - April		
	2026	2025	%	2026	2025	%
Production						
Corrugated case materials	122,189	117,540	+ 4.0	467,391	470,694	- 0.7
Recycled Fluting	61,886	59,782	+ 3.5	227,717	232,681	- 2.1
Testliner	60,303	57,758	+ 4.4	239,674	238,013	+ 0.7
Parent reels of tissue	61,026	60,897	+ 0.2	238,284	234,323	+ 1.7
Other papers and boards, incl. printing and writing paper	83,235	100,381	- 17.1	359,822	379,679	- 5.2
Total paper and board	266,450	278,818	- 4.4	1,065,497	1,084,696	- 1.8
Apparent Consumption						
Packaging paper and board	n. a.	n. a.	n. a.	1,218,880	1,218,034	+ 0.1
Corrugated case materials	201,867	195,061	+ 3.5	798,387	790,109	+ 1.0
Kraftliner and SC Fluting	23,871	32,174	- 25.8	124,215	123,096	+ 0.9
Recycled Fluting	71,023	69,914	+ 1.6	263,081	277,008	- 5.0
Testliner	106,973	92,973	+ 15.1	411,091	390,005	+ 5.4
Cartonboard and other board for packaging	n. a.	n. a.	n. a.	336,067	337,779	- 0.5
Packaging papers	n. a.	n. a.	n. a.	84,427	90,146	- 6.3
Parent reels of tissue	92,075	99,466	- 7.4	364,920	363,762	+ 0.3
Printings and writings	n. a.	n. a.	n. a.	408,435	406,015	+ 0.6
Uncoated mechanical	n. a.	n. a.	n. a.	58,902	60,031	- 1.9
Uncoated woodfree	n. a.	n. a.	n. a.	172,949	172,458	+ 0.3
Coated mechanical	n. a.	n. a.	n. a.	98,461	93,133	+ 5.7
Coated woodfree	n. a.	n. a.	n. a.	78,123	80,392	- 2.8
Other papers and boards	n. a.	n. a.	n. a.	188,116	196,489	- 4.3
Total paper and board	545,977	559,576	- 2.4	2,180,352	2,184,299	- 0.2
Exports						
Corrugated case materials	12,884	9,860	+ 30.7	61,694	41,399	+ 49.0
Recycled Fluting	5,007	3,238	+ 54.6	26,321	16,709	+ 57.5
Testliner	7,877	6,622	+ 19.0	35,373	24,690	+ 43.3
Other papers and boards, incl. printing and writing paper	51,177	58,013	- 11.8	193,491	200,312	- 3.4
Total paper and board	64,061	67,873	- 5.6	255,185	241,711	+ 5.6
Imports						
Corrugated case materials	92,562	87,381	+ 5.9	392,690	360,814	+ 8.8

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Corrugated case materials	22,882	27,881	+ 25.8	22,882	22,881	- 0.0
Kraftliner and SC Fluting	23,871	32,174	- 25.8	124,215	123,096	+ 0.9
Recycled Fluting	14,144	13,370	+ 5.8	61,685	61,036	+ 1.1
Testliner	54,547	41,837	+ 30.4	206,790	176,682	+ 17.0
Parent reels of tissue	31,162	39,016	- 20.1	126,901	130,932	- 3.1
Other papers and boards, incl. printing and writing paper	219,864	222,234	- 1.1	850,449	849,568	+ 0.1
Total paper and board	343,588	348,631	- 1.4	1,370,040	1,341,314	+ 2.1
Fibre						
Woodpulp mill usage						
Sulphate Bleached Softwood	24,568	24,664	- 0.4	100,856	93,598	+ 7.8
Sulphate Bleached Hardwood	34,685	32,236	+ 7.6	136,069	127,177	+ 7.0
Other grades of woodpulp	13,822	18,974	- 27.2	69,049	73,349	- 5.9
Woodpulp imports						
Sulphate Bleached Softwood	19,886	19,452	+ 2.2	83,883	78,872	+ 6.4
Sulphate Bleached Hardwood	40,450	37,318	+ 8.4	158,895	141,226	+ 12.5
Other grades of woodpulp	2,166	2,123	+ 2.0	7,510	11,174	- 32.8
Recovered paper						
Mill usage	221,143	230,183	- 3.9	821,884	861,856	- 4.6
Collection	606,865	535,047	+ 13.4	2,284,204	2,149,683	+ 6.3

Source: CPI

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UK recovered paper market sees July rally in brown grades

Export demand and PRNs drive prices for brown recovered paper

 **EUWID** + 05 August 2026

Unlike many markets on the European continent, the recovered paper market in the UK was exceptionally dynamic in July, with prices for the main brown grades rising sharply.

Prices for old corrugated containers (OCC, 1.05) were already a few pounds higher than in June at the beginning of the month. The upward trend gathered further momentum as July for deliveries in August progressed: By the end of July, market sources reported that prices of up to £117/t had already been achieved for initial August business, compared with highs of around £111-112/t at the beginning of the month.

Mixed paper and board (1.02) and supermarket paper and board (1.04) also benefited from the market strength, although increases were more modest at around £5/t.

Prices for kraft grades also continued to increase. In particular, used corrugated kraft (4.02) gained around £5/t, supported by strong demand from France and reduced availability. Prices for other kraft grades remained broadly unchanged.

Market participants cited robust demand for OCC from both the domestic market and export destinations as the main driver of these developments. At the same time, prices for Packaging Recovery Notes and Packaging Export Recovery Notes (PRNs/PERNs) continued to climb, briefly approaching the £10 mark. UK exporters also benefited from relatively low ocean container rates and favourable exchange rates against the US dollar.

The market received an additional boost after one major exporter reportedly purchased substantial volumes during July. With only limited additional quantities available, competition for brown recovered paper grades intensified further.

EUWID Price Watch Recovered Paper UK				
July 2026				
Prices in £ per tonne	July 2026 £	July 2026 €*	June 2026 £	July 2025 £
Mixed paper and board (1.02)	55 - 70	64 - 82	55 - 68	55 - 75
Mixed paper and board (1.02), export	57 - 78	67 - 91	55 - 78	65 - 80
Old corrugated containers (1.05)	92 - 108	108 - 126	85 - 103	90 - 100
Old corrugated containers (1.05), export	105 - 112	123 - 131	95 - 108	93 - 105
Magazines (1.06) ¹⁾	90 - 125	105 - 146	90 - 120	95 - 130
Sorted graphic paper for deinking (1.11) ¹⁾	85 - 95	99 - 111	80 - 95	80 - 110
Newspapers (2.01) ¹⁾	95 - 115	111 - 135	95 - 110	95 - 120
Sorted office paper (2.05)	130 - 135	152 - 158	125 - 135	162 - 175
White woodfree letters (3.05) ²⁾	255 - 270	298 - 316	250 - 270	-
Multigrade	140 - 150	164 - 176	135 - 150	165 - 175
White newsprint (3.14)	190 - 220	222 - 257	180 - 220	190 - 220
White woodfree uncoated shavings (3.18.01)	280 - 345	328 - 414	280 - 345	330 - 380
* Exchange rate as of 31 July 2026: £1 = €1.17				
¹⁾ includes exports and non-paper applications				
²⁾ From January 2026 onwards, the grade White woodfree letters (3.05) will be additionally covered by EUWID.				
© 2026 EUWID Europäischer Wirtschaftsdienst GmbH All rights reserved			EUWID assumes no liability for the accuracy of pricing information.	

European paper producers also showed interest in UK recovered paper but were reportedly discouraged by the elevated price levels.

Uncertainty grows on overseas markets

Market participants are becoming increasingly cautious about developments in overseas markets. Following the renewed escalation of the conflict in the Middle East, severe congestion developed at Indian ports. According to market sources, numerous vessels carrying cargo destined for the Gulf region were unable to leave port. One shipping line is even said to have temporarily suspended sailings to India. Under these circumstances, Indian buyers are currently unable to place additional orders for recovered paper.

Indonesia is also creating uncertainty. After authorities had recently applied the country's strict inspection regime less rigorously, inspections at the Port of Jakarta increased again in July, resulting in several shipments being rejected. According to market information, the affected material mainly originated from the United States.

All suppliers are therefore exercising extreme caution and are now shipping only top-notch material to Indonesia. Mixed paper is currently no longer being exported there. Some market participants even fear that Indonesia could eventually restrict imports of mixed paper or, in the worst case, recovered paper altogether.

Only a short-lived price peak?

Some market participants doubt that the high prices achieved at the end of July will prove sustainable. Rising oil prices are once again pushing up logistics costs. Shipping lines have also announced increases of around \$500 per 40-foot container for August, although it remains to be seen whether these increases can be implemented.

At the same time, the Dutch road toll scheme came into force on 1 July, increasing transport costs for deliveries to mainland Europe. According to market participants, these developments are likely to reduce ex works prices.

It also remains to be seen how weaker demand from India and Indonesia will affect the market in the coming weeks.

Palm and Eren expected to reshape UK recovered paper market

Far more significant than the short-term export fluctuations, however, are the additional recycled containerboard capacities that are due to come on stream in the UK.

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Market participants expect both Palm and Eren Paper to begin purchasing recovered paper for their new paper machines in the near future. While Eren is expected to focus primarily on OCC (1.05), Palm is likely to rely mainly on mixed paper and board (1.02) and supermarket paper and board (1.04). In practice, however, there is considerable overlap between these grades. For example, merchants can upgrade mixed paper by blending it with OCC to produce supermarket paper and board.

Once both machines reach full production, they are expected to consume almost 2 million tonnes of brown recovered paper annually. Although the UK will still be a net exporter on paper for recycling, many market participants expect much fiercer competition for available volumes and a structural shift towards a sellers' market.

At the same time, many smaller recycling companies that currently focus on loading export containers are expected to adapt their business models and to be able to supply the domestic market, including with loose material.

Slight increases for deinking and woodfree grades

The UK market for deinking grades remained broadly balanced in July. Modest price increases were mainly driven by paper mills building inventories ahead of the August holiday period. Some recycled tissue producers also showed stronger demand for magazines (1.06).

Palm's announcement that it will convert its King's Lynn paper machine from newsprint to recycled containerboard came too late to influence July prices for deinking grades of recovered paper.

In the longer term, however, the project is expected to reshape the market for deinking grades. Market participants believe that newspapers (2.01) and magazines (1.06) will continue to find buyers, possibly even within the UK, where one graphic paper producer could reportedly begin manufacturing newsprint.

Nevertheless, operators of sorting facilities for sorted graphic paper for deinking (1.11) are expected to reassess their capacity, not least because stronger demand for brown grades is likely to increase the value of mixed paper.

Supply of woodfree grades for tissue production remained good throughout July. Demand increased following the start-up of Essity's Unifibres operation in Prudhoe, although Essity purchased smaller volumes than many market participants had anticipated in July. As a result, only the lower end of the price range for sorted office paper (2.05) moved higher. Market participants expect prices to increase by a further £5-10/t in August as availability tightens.

A similar trend was reported for multigrade, which also continued to attract healthy demand outside the tissue sector. Further price increases are expected here as well.

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According to market information, Eren Paper is expected to start its new tissue machine shortly. The machine will run exclusively on primary-fibre pulp, however, market participants speculate whether it could eventually increase the availability of tissue broke in the UK market.

Gypsum board industry drives white newsprint prices

White newsprint (3.14) prices rose by up to £10/t during July. According to market sources, strong demand from gypsum board manufacturers was the main driver, with German producers said to be particularly active buyers.

By contrast, the market for high-white grades remained largely static. Demand continues to be described as very weak. However, limited availability is preventing prices from falling, as merchants remain willing to hold stocks until market conditions improve.

UK recovered paper exports			
tonnes	January - April		% Change
	2026	2025	
Total EU 27	218,538	259,906	- 15.9
France	35,031	47,986	- 27.0
Germany	59,860	69,378	- 13.7
Netherlands	74,740	88,883	- 15.9
Total other Europe	177,163	123,230	+ 43.8
Turkey	176,814	122,904	+ 43.9
Total Asia	1,083,226	943,363	+ 14.8
China	284	357	- 20.5
India	572,428	431,743	+ 32.6
Indonesia	131,497	89,271	+ 47.3
Malaysia	209,484	181,751	+ 15.3
Thailand	60,654	68,756	- 11.8
Vietnam	92,590	160,970	- 42.5
Total South America	-	120	-
Total Exports	1,479,584	1,326,650	+ 11.5
Source: CPI			

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Paper mills secure price increases for heatset newsprint in Germany

Brown kraftliner supply becoming a growing concern

 **EUWID** + 05 August 2026

Insiders are reporting that the latest round of price talks on Germany's newsprint market was very mixed. The starting point going into negotiations varied by company and sector, with outcomes just as different. In the end, newsprint producers managed to secure price hikes of varying sizes across individual business areas.

In late July, EUWID Interviews with companies active in the German market for corrugated case material and for corrugated board and packaging revealed that brown kraftliner is becoming scarcer. All volumes are still being delivered as agreed, but different buyers are reporting that they are now taking every lorryload they can get. The market was not facing a shortage yet, but conditions were tight.

Newsprint manufacturers manage to increase prices in spite of opposition

Over the past few weeks, companies active in Germany's newsprint business have been discussing the latest round of price talks from multiple angles. Quarterly contracts have mostly been the outcome of the July price talks. Price hikes achieved for coldset and heatset newsprint grades alike have prompted frustration here and there. Publishing house buyers describe the hike as "not helpful" but "unavoidable". For their part, buyers from the world of commercial printing are far more critical of the approach taken by many paper mills and fear serious repercussions for their business. Commercial printers and publishers both confirm that they will be paying closer attention to prices when placing future orders in an effort to avoid additional costs wherever possible.

When comparing the price talks for coldset and heatset newsprint, it quickly became clear that the starting conditions, the negotiation process and the results varied from one segment to the next.

EUWID Price Watch Germany July 2026			
Prices in € per tonne free delivered unless otherwise stated	July 2026	June 2026	July 2025
Fine paper			
Woodfree uncoated			
A4 C-grade, branded paper	810 - 920	820 - 920	850 - 940
A4 C-grade, non-branded paper	780 - 810	790 - 820	820 - 890
Offset sheets 80 g	910 - 990	940 - 990	950 - 1,050
Offset reels 80 g	890 - 940	900 - 940	910 - 980
Woodfree coated			
Sheets, double coated, 100 g	900 - 980	930 - 990	950 - 1,050
Reels, double coated, 100 g	890 - 940	900 - 950	900 - 960
Publication paper			
Newsprint 45 g (coldset)	600 - 635	585 - 610	585 - 610
Newsprint 42.5 g (coldset)	610 - 645	595 - 620	595 - 620
Newsprint 45 g (heatset)	610 - 650	585 - 610	580 - 610
LWC offset 60 g	795 - 840	795 - 840	770 - 805
SC offset 56 g (A)	675 - 695	670 - 690	670 - 695
SC rotogravure 56 g (A)	675 - 705	670 - 700	670 - 695
Corrugated case material			
Primary fibre corrugated case material			
Unbleached kraftliner from Scandinavia 175 g	970 - 990	910 - 990	890 - 930
Semi-chemical corrugated medium ¹⁾	815 - 1,080	815 - 1,040	795 - 1,020
White-top kraftliner 140 g	1,150 - 1,230	1,110 - 1,230	1,090 - 1,170
Recycled corrugated case material			
Schrenz	640 - 650	640 - 650	610 - 630
Wellenstoff	670 - 680	670 - 680	640 - 660
Testliner II	700 - 710	700 - 710	670 - 690
Testliner III	680 - 690	680 - 690	650 - 670
White-top testliner, coated	930 - 950	930 - 950	930 - 970
White-top testliner, 140 g, ISO 70-75	810 - 825	810 - 825	830 - 845
Cartonboard			
Unlined chipboard	815 - 835	815 - 835	815 - 855
GD II	870 - 940	870 - 940	890 - 960
GC II	1,140 - 1,195	1,140 - 1,205	1,240 - 1,275

¹⁾ Prices at the upper end of the range represent Scandinavian primary fibre grades, lower-end prices are quoted for other European grades.

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Insiders consistently reported that paper suppliers and publishing house buyers settled quickly on increases of €20-25/t, and rarely less than €20/t, for coldset newsprint. Multiple sources agreed that paper mills treated €600 as the price floor, with asking prices frequently at €605 or €610 and sometimes going up to €625/t.

Sources told EUWID that paper mills underscored the cost pressures they face and pushed hard for price increases during negotiations. Paper industry insiders added that increased capacity utilisation at the end of the second quarter helped to underpin their efforts to charge more.

Availability was a significant factor in price talks for heatset newsprint in Germany. While opposition to producers' price plans emerged quickly, newsprint had not always been readily available in recent weeks for a variety of reasons. This made it harder for buyers to redirect volumes, observers pointed out.

Generally speaking, heatset newsprint became €25-35/t more expensive, with hikes going up to €40/t. What's more, multiple insiders said that several paper mills were implementing mark-ups of €40/t or €60/t for special or project business.

These even larger increases were fuelled by the existing gap between prices quoted for heatset and coldset newsprint, which was too wide and thus not sustainable. Several experts confirmed that the pricing of recent special and project business transactions involving heatset newsprint had become a major concern for many paper producers. Over the past few months, manufacturers had cut back the supply of heatset newsprint because production was economically unattractive. They now intend to bring prices for this business back into line with prevailing market levels, either in one step or in two stages.

Commercial printers criticised paper mills for pursuing the July price increase "at all costs." Some are astonished that several suppliers are striving to push through such hefty hikes at the very time when printers were already under strain. At the end of the day, they had faced considerable cost pressure for months in what was a declining market. The latest surcharges for numerous consumables and logistics had been extremely hard to pass on to print buyers. In light of this situation, they said, the industry was characterised by a highly strained competitive landscape that threatened some companies' very survival.

Commercial printers worry that paper prices and the resulting high printing costs might have a negative impact on business, and that demand will suffer renewed setbacks. Other sources countered that good-quality print products remain indispensable for advertisers because they have a high degree of effectiveness. Potential alternatives, such as digital marketing, were still largely under development and too often missed the mark, leaving several insiders in the printing business confident about the future of paper-based advertising.

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Experts explained that a continuous structural downturn in demand was unavoidable. However, a renewed slump in demand for paper was less likely. Instead, they expect the annual decline in demand to level off.

Paper industry representatives stressed that they had to turn a profit, even in a contracting market. The current period of upheaval in the graphic paper business might put mills under existential pressure, so newsprint producers felt compelled to improve their earnings situation.

Palm recently reacted to this complex situation by announcing the conversion of the King's Lynn paper mill from newsprint to corrugated case material production. Observers said that the move could affect not only the British newsprint market, but also Continental Europe. Observers did not expect the conversion to result in an outright shortage, but said it could tighten the newsprint market. Against this backdrop, any unplanned production stoppages could lead to temporary shortages of newsprint. What's more, many buyers are concerned that the change would give paper mills more leverage for additional price increases.

Consolidation within the printing industry in Germany and Europe in general is also a much-discussed topic on the newsprint market. Experts anticipate additional measures to reduce printing capacity, which might also involve closures.

Brown kraftliner supply increasingly tight

As July drew to a close, EUWID survey on the corrugated case material market in Germany revealed that the availability of brown kraftliner is dwindling. All volumes are still being delivered as agreed, but a variety of sources noted that buyers will now take any lorryload that they can get their hands on. The market was not short of supply yet, but conditions were tight and EUWID contacts expect the market to become increasingly strained.

The reasons for this trend remain the same as those identified in the two previous market surveys. Sweeping capacity cutbacks in North America since the start of 2025 are now having an impact in Europe. Countries that had always sourced lots of kraftliner in North America now had to switch to other suppliers, benefitting European producers. German converters, which source comparatively little kraftliner from North America, are nevertheless also feeling the effects, as converters in other countries are replacing missing overseas volumes with purchases from European producers, thereby tightening the market.

Compounding matters, European kraftliner producers are scheduled to take maintenance downtime in August and/or September. One key producer had reportedly pushed back the project until next year. Others reported that this was not an option and they would carry out this work. Sources said that they recommended that their customers start placing orders for October now as a result. Converters also suspect that this year's price talks might not be done and dusted yet.

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Information about developments in the German market for semi-chemical fluting is also mixed. Manufacturers told EUWID that prices had risen in Europe, but not in Germany. For their part, German converters said that they had been paying €40/t more for SC fluting since 1 or 15 July. With this grade playing only a minor role in Germany, a clear picture has not emerged yet.

In July, prices for brown and white-top kraftliner were only adjusted in cases where they had not edged higher in June. Unlike brown paper grades, however, white-top kraftliner is not viewed as scarce or hard to source.

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New competitors increase pressure on players in German tissue paper market

 **EUWID +** 05 August 2026

The European tissue market landscape is changing. Three internationally active companies – Arbex, Velvet Care und Asia Pulp & Paper (APP) – and their plans are being closely watched in the tissue paper industry in Germany and across Europe. Although some of the expansion plans have yet to take shape, they are already influencing decision-making in the tissue industry.

Until now, Brazilian pulp producer Suzano has not been an active supplier of tissue products in Europe. However, a joint venture between Suzano and Kimberly-Clark started operations on 1 July under the name Arbex, adding a new competitor to the European market. This company incorporates Kimberly-Clark's former Family Care and Professional (IFP) business (excluding in North America). Arbex thus runs 22 production sites in 14 countries, including several in Europe, which can produce around 1 million t of tissue per year.

Polish company Velvet Care has been distributing its tissue products in Germany via external partners for the past 10 years. With the aim of tripling its deliveries in the neighbouring country by 2028, it established the sales and distribution subsidiary Velvet Care Germany in May of this year. Total production capacity of the Velvet Care Group is around 280,000 tpy. In Sulęcín, a Polish town near the German border, the company is currently building a new converting facility, which is expected to start operations in the second half of 2026 and make products for the DACH (Germany, Austria, Switzerland) markets.

Asia Pulp & Paper (APP) is expanding its footprint in the tissue market in Germany and across Europe with the expansion of its sales and distribution structure. The company has tissue production capacity of around 2.8 million tpy, located solely in China and Indonesia.

Insiders see European tissue industry as well-positioned

German tissue paper and products manufacturers are closely watching the activities of Arbex, Velvet Care and APP. "We have respect for what is currently being established in the market," one producer commented to EUWID. The new market entries were definitely factors that European players had to take into account when making business decisions, the player added. Ultimately, however, it remains to be seen how many new volumes the competitors will actually bring onto the German market, commented a different producer.

Market experts believe the European tissue industry is well-positioned. At the same time, companies still need to continuously invest in modernising and optimising their production, EUWID was told. Against this backdrop,

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representatives of the tissue industry say there is definitely increased pressure in the European sector, which is already undergoing a process of consolidation. For example, Wepa acquired French tissue producer MPH1865 in April to strengthen its position in the B2B market in France.

To increase their flexibility in the areas of procurement, production and IT, the Swiss tissue paper firms Tela and Cartaseta, along with Poland's Fabryka Papieru Czerwonak and Germany's Fripa, have moved under the roof of a holding company named AF Tissue Expert Group. Moreover, Fripa is currently investing in the construction of a new tissue machine at its Miltenberg site.

Another major market player, Essity, is exploring a potential sale of its consumer tissue division, which includes products such as toilet paper, kitchen rolls and napkins for the consumer market. This division includes a total of 29 paper mills and converting plants worldwide, around 20 of which are in Europe.

Experts expect changes in raw material procurement

The upcoming changes will affect not only the corporate landscape but also the upstream procurement markets in Germany and across Europe, insiders believe. Merchants surveyed by EUWID speculate that the availability of market pulp could increase, as the new player Arbex can source pulp internally thanks to the vertical integration with Suzano and is not reliant on external purchases. This situation could influence the business of pulp suppliers, they say.

At the moment, tissue inventories are said to be relatively good. Market insiders say there have been a growing number of inexpensive offerings of parent reels from Asia. Some believe these Asian imports could increase price pressure in Europe.

According to insiders, the freight situation has barely changed in recent weeks after the volatility caused earlier by the outbreak of war in Iran. The renewed blockade of the Strait of Hormuz has no direct impacts on the tissue business, but higher oil prices translate into increased costs for fuel and therefore also for land and sea transports.

The companies surveyed by EUWID expressed satisfaction with the capacity utilisation of their machines. The most recent figures from the German association of paper producers, Die Papierindustrie, show a production decline of slightly more than 2 per cent in Germany over the January-May 2026 period compared with one year earlier.

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Decor paper manufacturers manage to raise prices again despite opposition from buyers

Production set to fall sharply in Europe over the holidays

 **EUWID +** 05 August 2026

Despite delivery and capacity utilisation challenges, European decor paper producers have pushed through their price demands for paper produced from July onwards, albeit with slight concessions. In most instances, buyers had to accept hikes of €10 rather than the €10-15/100 kg originally sought. The new prices often apply to decor paper produced from July and should likely be established across the board by the start of August, insiders say. Together with the €15-20 hikes instituted in April and May, prices have climbed by a total of €20-30 over the past four months.

That being said, several manufacturers caution that these increases do not fully recoup rising costs for upstream products, energy and logistics. It is also hard to judge where upstream products and energy costs are headed next. Eucalyptus pulp prices have now stabilised, with some converters thinking that slight price cuts might be on the cards for the months ahead. By contrast, additional price increases are emerging for titanium dioxide. Following slight corrections in the second quarter, manufacturers are now planning triple-digit hikes. Energy prices continue to fluctuate widely. Natural gas spot prices fell noticeably in June, in particular, but have risen sharply again in recent weeks. Nonetheless, some decor paper manufacturers reportedly plan to slightly reduce the energy and logistics surcharges imposed on top of the second quarter price increases by August.

Weak demand in many regions and buyer segments has kept weighing on decor paper producers' order intake and delivery figures in the past few weeks. Most companies have responded by further curbing their output. Longer stoppages last occurred primarily over the Easter and Whitsun holidays. Additional stoppages in May and June were intended above all to avoid or offset excessive inventory building.

In the second half of July, the phase of holiday-related shutdowns began, which will usually last one to two weeks. Some decor paper manufacturers will also halt production for longer to perform planned maintenance shutdowns or conversion work. However, mounting import pressure from China is partly offsetting the impact of these stoppages.

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MP: Uncertainty surrounding PPWR and EPR leads to reluctance among financial investors

MPIPE trend indicator is of limited applicability to the packaging sector

 **EUWID +** 05 August 2026

Europe's private equity investors are entering the most active period of investments in two years – at least in the industrial sector. This was shown by MP Corporate Finance's current MP Industrial Private Equity (MPIPE) indicator covering the first six months of 2026. The study conducted in the second quarter of 2026 by the consulting and M&A company MP, which specialises in the European industrial sector, was based on a survey of more than 4,000 senior professionals working in the private equity industry throughout Europe.

The MP study reveals that 79 per cent of the respondents are expecting growing investor interest in industrial companies. This equals an increase of around 11 per cent compared with the second half of 2025 and is the highest value recorded in two years.

However, Gregor Nischer, founding and managing partner of MP Corporate Finance, underlined towards EUWID that the general trends highlighted by the MPIPE indicator such as the high interest in industrial targets in general and increased deal activity were applicable to the packaging industry only to a limited extent. Mr Nischer said that although the packaging sector also furnished proof of enormous pressure to act on the part of financial investors, a far more selective approach was being pursued in the packaging industry.

While on the whole, an increasing level of activity was observable among private equity firms concentrating on investments in non-listed companies, financial investors in the packaging area were still showing more reluctance, he said. In his view this is not to be seen as a sign of the sector's decreasing attractiveness but rather results from regulatory uncertainty surrounding the EU's Packaging and Packaging Waste Regulation (PPWR) and the Extended Producer Responsibility (EPR).

According to Mr Nischer, the trend indicator has highlighted the growing weight of strategic buyers, and this is almost identical with the consultancy's observations in the mid-cap packaging market, where strategic buyers are already clearly dominating the market.

Certain dynamics are dominating the packaging sector

MP's managing partner Nischer is of the opinion that specific dynamics are currently dominating the packaging industry. On the one hand, pure growth is losing importance as a primary investment motive. Against the background

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of persisting weakness of demand coupled with high costs, M&A transactions in general and most notably acquisitions are rather used to safeguard cost advantages, optimize production structures and leverage economies of scale.

He explained that size and purchasing power had become key competitive factors because raw materials accounted for a high proportion of costs. In addition, larger production networks enable companies to better control costs and pass on price increases to customers more easily.

Furthermore, southern Europe and more specifically Italy and Spain were becoming a key focus thanks to their competitive energy and wage costs and a profoundly solid economic development, explained Mr Nischer. He added that to date, only a few large packaging producers had established branches in this region because they had rather tended to focus their investments on central Europe over the past few years.

Higher focus on packaging for luxury and pharmaceutical products

Moreover, demand-side differentiation is increasing in the market: food packaging suffers from persisting, inflation-driven loss of purchasing power on the part of consumers, whereas the markets for luxury and medical packaging have remained far more robust. According to Mr Nischer, this results among others from consumers' lower price sensitivity, rare change of supplier and packaging that can hardly be replaced. Both segments were therefore attracting more interest from potential investors, he concluded.

Sustainability decisions are in fact decisions on costs

MP Corporate Finance sees the packaging industry faced with the key challenge of a combination of cost pressure and regulatory uncertainty. Taking the form of volatile oil prices, energy costs, for example, are an additional burden on all material segments and plastic-based packaging. At the same time the PPWR and EPR force companies to make investments in recyclable materials and new production processes. Although this is often technologically feasible, it is difficult to achieve economies of scale, which leads to a situation where sustainability decisions are in fact cost decisions. As a result, pressure on small and medium-sized suppliers is rising substantially – without sufficient scale, it is increasingly difficult to pass higher prices on to customers, or to make sufficient investments in compliance.

Mr Nischer expects that rising cost pressure, growing regulatory requirements and the increasing importance of scale will not end in the second half of 2026. According to him, strategic buyers will continue to dominate the SME sector, while at the same time financial investors will face increasing pressure to invest. Whether or not the deal pipeline, which was well-filled at present, actually translated into completed transactions would largely depend on the financing conditions offered by banks, he said. In Mr Nischer's view, this is specifically true for the packaging sector and in general for the entire German and European industry.

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PPWR puts focus on IT systems and reliability of data quality, reports KPMG

 **EUWID +** 05 August 2026

From 12 August 2026, the European Packaging and Packaging Waste Regulation (PPWR) will directly apply in all EU member states. From then on, packaging may only be placed on the market if it complies with the applicable requirements. The Regulation establishes a phased system of obligations, transitional periods and further implementing provisions.

International audit and advisory firm KPMG says that companies active in the packaging industry and adjacent segments must be able to actively manage their compliance, demonstrate that they meet the applicable requirements, and pay fees in line with the member states' fee schemes. In addition, companies should also pay attention to the interplay between the PPWR and other rules and regulations such as the Empowering Consumers (Empco) Directive with a view to packaging sustainability claims.

In this context KPMG sees huge challenges for companies in the areas of compliance, data management and IT systems. Therefore, the implementation could make it necessary to reorganise existing IT, data and contract structures, the company says. Moreover, a well-structured data base could serve as a tool to identify cost-cutting potential e. g. in the context of the eco-modulation of Extended Producer Responsibility (EPR) fees, it adds.

The targets set for the period from 2030 lead to further requirements. Recyclability, recycled content levels and reuse rates must not only be met but also substantiated with reliable evidence. KPMG reports that the packaging information required to do so is still spread over several systems in many companies, is not updated consistently, or the relevant data cannot clearly correlated with each other.

KPMG recommends that companies should first of all identify the roles, obligations and responsibilities which result from the PPWR in their specific case. After that, one should find out which packaging data are needed, where such data are stored, how consistent they are and how easily they can be correlated with each other. The companies concerned should also take into account their contractual arrangements to ensure the flow of information and data from suppliers. Based on this, existing compliance management and master data management systems should be reviewed for clarifying whether or not they can meet the requirements stipulated in the PPWR and if they need to be adjusted.

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Weak market environment pushes Södra into the red in the second quarter

 **EUWID +** 05 August 2026

Swedish forestry and pulp group Södra slipped into the red in the second quarter. The company would have been in the red in operative terms even in the first quarter without the high capital gain from the sale of its Baltic forest land, which does not feature in the second quarter. Södra attributes the loss to chronically weak demand, depressed price levels and the imbalance between raw material costs and final product revenues.

Group sales were slightly below the previous year's level. According to the company, earnings were mainly burdened by lower deliveries. In addition, delays in passing on lower raw material costs along the value chain made a negative impact.

Södra describes the pulp market as particularly difficult. Weak demand for board and paper impacted the pulp market Europe-wide. Around the globe, there is still slight oversupply of softwood pulp, which continues to exert pressure on prices. The price of softwood pulp has stopped rising in Europe and the US, while the price level in Asia remains unchanged. In addition, the geopolitical situation created uncertainty in global pulp flows. Production proceeded according to plan and the volumes produced were sold, Södra writes.

Södra Cell significantly reduced its operating loss compared with the same quarter of the previous year thanks to higher delivery volumes and lower overheads, partly due to lower maintenance downtime expenses. The Bioproducts business developed more positively. Södra reports healthy demand and prices for electricity, biomethanol and turpentine. The market for dissolving pulp was also robust.

Meanwhile, Södra is continuing the austerity programme that it has embarked on. Since the launch of the Södra Leap program, overhead costs have been significantly reduced. The second quarter alone accounted for over half of the savings generated so far. Savings came from lower consulting costs, completion of major IT projects and personnel adjustments, amongst others. At the same time, the company says it is working to strengthen its sales organisation and increase value creation along the entire process chain. Södra implemented further efficiency measures in the reporting quarter.

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Södra results				
million SEK	April - June		January - June	
	2026	2025	2026	2025
Key figures				
Sales	6,947	7,193	13,551	15,348
EBITDA	-10	15	1,297	851
Operating result	-424	-389	470	50
Net result	-370	-321	750	38
Selected business area review				
Södra Cell				
Sales	3,427	3,418	6,829	7,930
EBITDA	206	71	340	898
Operating result	-88	-221	-247	318
Production in 1,000 t	468	432	931	924
Deliveries in 1,000 t	457	428	949	942
Source: Södra				

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TNC improves performance during the year, but results remain below last year's level

 **EUWID +** 05 August 2026

In the second quarter of the current financial year, The Navigator Company (TNC) improved its performance compared with the first quarter. However, both its second-quarter and first-half results remained below the corresponding figures for the previous year.

Deliveries and selling prices for printing and writing papers developed positively over the course of this year. The company says that average prices for woodfree uncoated paper and packaging paper were 11 per cent higher in June than in December last year. Despite these increases, average prices for woodfree uncoated paper in the first half of 2026 remained below the level recorded a year earlier.

Shipments of printing and writing paper and packaging paper increased by 6 per cent in the second quarter compared with the first quarter. Although European demand for woodfree uncoated paper declined by 2 per cent year on year in the first half of 2026, TNC reported a mill operating rate of 90 per cent, compared with an average utilisation rate of 86 per cent across European producers.

In the tissue business, deliveries in the second quarter were broadly in line with those of the first quarter, while selling prices increased by around 2 per cent. Compared with the second quarter of 2025, however, tissue shipments declined by 9 per cent, reflecting challenging competitive conditions in the UK market.

The company's packaging segment reportedly continued its strong growth in the second quarter. Following a significant increase in the first quarter, deliveries rose by a further 9 per cent quarter on quarter and were 67 per cent higher than in the second quarter of 2025. According to TNC, packaging papers made from eucalyptus pulp are being well received by the market, particularly in the lightweight flexible packaging segment.

Pulp sales declined both compared with the first quarter of this year and with the second quarter of 2025. The company attributed the decrease to lower pulp availability resulting from scheduled maintenance shutdowns at its Setúbal and Aveiro mills, as well as to inventory build-up ahead of the planned maintenance shutdown at the Figueira da Foz pulp mill in July.

The contribution of the energy business to Group revenue declined as renewable combined heat and power (CHP) plants now primarily supply the company's own energy requirements. In addition, the Energy segment has been integrated into the Pulp segment, reflecting the close operational interdependence of the two businesses.

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Looking ahead to the second half of the year, TNC expects market uncertainty and geopolitical volatility to persist. Short-term price fluctuations and significant supply chain disruptions remain possible at any time. Following the announcement of further price increases for woodfree uncoated paper in June, the company expects prices for printing and writing papers to develop positively in the third quarter.

At the same time, TNC says the long-term structural decline in printing paper consumption will continue and is therefore pursuing the further diversification of its product portfolio. Tissue now accounts for around 25 per cent of Group sales, pulp for 12 per cent and packaging paper for 6 per cent, while the paper business remains by far the largest segment, contributing 57 per cent of total sales.

The Navigator Company results				
million €	April - June		January - June	
	2026	2025	2026	2025
Key figures				
Sales	442	490	869	1,019
EBITDA	79	101	143	216
Operating result	36	65	59	137
Net result	32	37	49	85
Source: The Navigator Company				

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UPM reports improved Q2 results, Sappi JV and plywood spin-off drive transformation

🔒 EUWID+ 05 August 2026

In the second quarter of the financial year, UPM improved its results compared with the previous year and, in many cases, with the previous quarter. The figures for the first half of the year as a whole were also stronger, with UPM achieving comparable Ebitda of €771m (2025: €678m), an operating profit of €472m (€305m) and a net profit of €366m (€215m) in the first six months. Sales fell due to lower prices for pulp and graphic paper, whilst paper sales volumes also declined. UPM cites increased sales volumes, margin management and efficiency measures as factors behind its improved profitability in a business environment that was also characterised by inflation.

“In the second quarter, we reached two important milestones in the transformation of UPM. We signed the definitive agreement to create the graphic paper joint venture with Sappi, and advanced the separation of the plywood business into the future WISA Group. Following these steps, UPM is positioned with stronger growth prospects and improved earnings quality,” says CEO Massimo Renaudo, summarising the key events for UPM in the second quarter.

UPM explains that its pulp platform in Uruguay, UPM Fibres South, has continuously improved its performance for several consecutive quarters. This helped to offset the rise in logistics and other costs during the second quarter. Profitability was supported by a moderate rise in pulp prices. However, UPM states that the business environment for the “Fibres North” platform in Finland was challenging. Despite lower prices for pulpwood, profitability remained low. The second-quarter results were also impacted by the maintenance shutdown at UPM’s Pietarsaari mill.

UPM describes the business performance of UPM Communication Papers as broadly stable, with slightly improved margins. Demand for graphic paper in Europe fell by around 3 per cent year-on-year in the second quarter, with the sharpest decline in magazine paper and a slightly smaller decline in fine paper, the company says. Selling prices rose slightly compared with the first quarter of this year, but remained slightly below the same quarter last year.

Preparations for the planned joint venture with Sappi in the graphic paper sector continued. At the end of May, both companies signed the final agreement and secured financing for the joint venture. The EU merger control proceedings moved into Phase II, with final decisions expected by the end of 2026, UPM said.

UPM Biofuels reported a quarter characterised by good demand and solid bio-premiums for renewable fuels. Prices were further supported by higher reference prices for fossil fuels. The biorefinery in Leuna continued to ramp up operations. UPM states that customer deliveries of industrial sugar reached “substantial volumes”, and that deliveries of renewable functional fillers and other lignin derivatives are expected to begin in the third quarter.

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UPM Energy improved its results compared with the previous year, although the usual seasonal fluctuations were observed in the second quarter. Structurally, electricity consumption continued to rise compared with the previous year.

The markets for the UPM Adhesive Materials and UPM Specialty Materials business units recorded growth in Europe and Asia. UPM describes the US market as having comparatively weaker demand.

UPM Plywood has continued to perform well, UPM states. The business unit is preparing for its spin-off into an independent listed company, the WISA Group. In April, the Board of Directors approved the spin-off plan. Subject to the decision of the extraordinary general meeting, it is currently anticipated that trading in WISA Group shares on Nasdaq Helsinki will commence in early November.

Following the planned joint venture with Sappi in graphic papers and the spin-off of its plywood business, UPM expects to operate in structurally growing markets, with a stronger focus on higher-value products that are less exposed to economic cycles.

For UPM, the outlook for the second half of the year remains subject to uncertainties regarding geopolitical developments and its business operations. The company expects a moderate rise in sales prices compared with the first half of the year, but also slightly higher variable costs. Energy refunds are expected to support the result of UPM Communication Papers in the fourth quarter. Higher costs will arise from maintenance shutdowns and the continued ramp-up of production in the Leuna bio-refinery.

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UPM results				
million €	April - June		January - June	
	2026	2025	2026	2025
Key figures				
Sales	2,440	2,400	4,945	5,046
Comparable EBITDA	376	257	771	678
Operating result	217	107	472	305
Net result	166	71	366	215
Business area review				
UPM Fibres				
Sales	885	870	1,761	1,909
Comparable EBITDA	181	149	359	376
Pulp deliveries, 1,000 t	1,320	1,192	2,732	2,625
UPM Communication Papers				
Sales	594	630	1,207	1,294
Comparable EBITDA	47	21	74	87
Paper deliveries, 1,000 t	700	740	1,426	1,471
UPM Adhesive Materials				
Sales	448	425	861	859
Comparable EBITDA	56	49	101	98
UPM Specialty Materials				
Sales	341	328	673	702
Comparable EBITDA	51	48	103	107
Paper deliveries, 1,000 t	367	343	734	710
UPM Plywood				
Sales	121	89	240	192
Comparable EBITDA	18	7	35	19
Other Operations				
Sales	208	192	393	358
Comparable EBITDA	-7	-33	-21	-70
UPM Energy				
Sales	141	118	392	291
Comparable EBITDA	26	12	128	63
Source: UPM				

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Fire at Essity's Prudhoe mill causes no supply disruption

 **EUWID +** 05 August 2026

A fire at Essity's Prudhoe tissue mill in the UK on 24 July caused no injuries or major damage, according to the company. A company spokesperson told EUWID that the fire broke out on the mill's second paper machine late on Friday evening. There was no significant damage to the machine, raw materials or finished goods. The affected paper machine had resumed production on Wednesday, 29 July, and was operating normally, the company said.

Martin Hallissey, site director at Prudhoe Mill, said the fire had been quickly brought under control by the fire and rescue service, which remained at the site until 1 a.m. on Saturday.

"Thankfully there were no injuries and the site was up and running again within hours," Mr Hallissey said. "As such, we do not anticipate any impact on customer deliveries."

Essity's new Unifibres recycled-fibre processing facility was not affected by the incident. The facility is located in a separate part of the Prudhoe site, around a five-minute drive from the paper mill.

The Prudhoe mill is considered Essity's largest site in the UK. It employs around 400 people.

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Cartiera del Vignaletto boosts energy efficiency of tissue mill

 **EUWID +** 05 August 2026

Italian technology company Toscotec has completed a modernisation project for Cartiera del Vignaletto aimed at increasing energy efficiency at the production site in Zevio near Verona. Under the project, Toscotec upgraded the combined heat and power plant at the Zevio site and the air system of the two tissue machines PM 4 and PM 5, the company said.

The Zevio tissue mill runs two tissue machines with a combined production capacity of around 46,000 tpy. The machines run at speeds between 1,200 and 1,700 m/min and produce primary fibre-based tissue in basis weights of 15-40 g/m².

A 5.5 MW gas turbine supplies both paper machines with electrical power. Thanks to the conversion, waste heat from the turbine can now be fully used to heat the hood air systems of both machines as well as to provide high- and low-pressure steam for paper production. According to the company, the entire heating and air system was redesigned and optimised to maximise energy efficiency of the site.

Cartiera del Vignaletto produces sanitary and household papers. The portfolio includes jumbo reels for toilet paper, kitchen rolls, handkerchiefs, napkins and towels.

The company's subsidiary Main Spa was established in 2000 and runs a production site in Pisticci, near Matera in south Italy. The mill produces airlaid nowovens for hygiene, medical, and food packaging applications.

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Voith and Palm implement conversion project in King's Lynn

 **EUWID +** 05 August 2026

German engineering company **Voith** will be **Palm Paper's** partner in the project to convert the PM 7 in Kings Lynn from newsprint to recycled corrugated case material. Palm and Voith have a longstanding partnership in the paper industry. Among other projects, Voith supplied the Blue Line OCC stock preparation system for PM 5 at Palm's Aalen site.

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Angela Eagle takes over as UK Environment Secretary

 **EUWID +** 05 August 2026

Dame **Angela Eagle** was appointed **UK Secretary of State for Environment, Food and Rural Affairs** by Prime Minister Andy Burnham following the change of government in July 2026. She succeeds **Emma Reynolds**, who had headed Defra since September 2025 after taking over from Steve Reed.

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Bellmer upgrades PM 4 at Steinbeis Paper mill in Glückstadt

 **EUWID +** 05 August 2026

Technology supplier **Bellmer** has installed a new headbox and upgraded the PM 4 at **Steinbeis Paper**'s Glückstadt mill in Germany. The investment is aimed at improving sheet formation, enhancing energy efficiency and increasing output quality of PM 4, which is designed to produce uncoated recycled paper. Steinbeis Papier Glückstadt runs two paper machines with a combined capacity of 300,000 tpy and produces recycled graphic paper, including copy paper as well as coated and uncoated printing paper for office and graphic applications.

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Faller Packaging pauses plans for new headquarters

 **EUWID +** 05 August 2026

German company Faller Packaging is reevaluating its plans for the Waldkirch site in Germany as part of its extensive transformation process. The folding cartons producer is amending its plans to erect new buildings at its head office. While in September 2024 the company announced it had cleared the way for the project, it now told EUWID that project development is paused. The company could not currently say how long the project would remain on hold.

For now, the company wants to gradually combine its plants 1 and 2 in Waldkirch, which are located only meters from each other, into one production site by 2028. The aim here is to simplify processes, use capacities more efficiently and secure the site's economic basis.

Faller Packaging will continue to be based in Waldkirch and wants its headquarters to remain at the site or in the immediate vicinity. Moreover, the company says it is evaluating company-wide measures to adjust costs and organisational structures. With this transformation process, Faller wants to improve its competitiveness and build the foundation for further growth.

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Mondi completes closure of two packaging plants in Germany and Hungary

 **EUWID +** 05 August 2026

After Mondi Group announced plans to close a total of six packaging plants in early 2026, two closures have now been completed. The sites affected are the paper bag plants in Hammelburg, Germany and Nyíregyháza, Hungary. The company says it has already successfully transferred the order volumes to other plants.

The closures of the remaining four packaging plants are to be completed by the end of 2026. Responding to an inquiry from EUWID, Mondi informed in April as part of the announcement of further capacity reductions that it would also close the corrugated board plants in Dorohusk, Poland, Szada, Hungary, and Gebze, Turkey. The co-packing and fulfilment center in Lehrte, Germany, which Mondi had integrated in the wake of acquiring Schumacher Packaging, is also part of the capacity adjustments, according to the group.

Although the packaging plants were profitable, alternative locations would offer greater benefits of scale, better growth opportunities and the ability to serve customers more efficiently, the company said.

A total of around 580 jobs are expected to be lost as a result of the closures of the six packaging plants in Germany, Poland, Hungary and Turkey. At the same time, the capacity adjustment will be accompanied by the relocation of 30 large production facilities within the group, Mondi emphasises in its financial report for the first half of 2026. Transfer of customer orders is reportedly proceeding according to plan.

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Polish folding box producer Tamir to build third plant

 **EUWID +** 05 August 2026

Polish packaging producer Tamir pushes ahead with the expansion of its capacities. In addition to building a new carton plant in Bystrzyca Kłodzka, near Wrocław in southwestern Poland, the family-owned company also invests in a new digital printing machine. According to the company, commissioning of the printing line is scheduled for late August.

The new carton plant will be built in the Wałbrzych special economic zone. The investment is intended to increase Tamir's production capacity. To date no information has been published on the investment volume, the timeline for the completion of the plant and the future production capacity. The new machine will in future handle small and medium production runs that have previously been manufactured using offset printing.

Founded in 1993, Tamir currently produces folding boxes, laminated corrugated packaging and leaflets. The company serves customers in the pharmaceutical, cosmetics, food, automotive and appliances sectors across Poland and other European countries.

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Finch Paper to cease in-house pulp production and switch entirely to market pulp

 **EUWID +** 05 August 2026

US uncoated woodfree paper manufacturer Finch Paper will stop producing pulp at its integrated pulp and paper mill in Glens Falls, in the US-state of New York. The company plans to cover its entire pulp demand from market pulp in the future. This was reported by different local media outlets citing company information.

Media reports quote Finch Paper as saying that the market has changed dramatically over the past 20 years, meaning the company can now reliably purchase pulp at a lower cost than it can produce it on site. According to the reports, Finch Paper has until now covered around 60 per cent of its pulp requirements through in-house production and purchased the remaining 40 per cent on the market.

It was also reported that existing integrated pulp production is intended to strengthen the site's competitiveness, cut costs, allow Finch Paper to focus exclusively on paper production, and expand its product portfolio.

The company did not respond to repeated inquiries made by EUWID asking for statements on the reasons for this decision and the effects resulting therefrom.

Finch Paper belongs to a portfolio of companies held by US investment firm Atlas Holdings. The company says to have 600 employees and to operate three paper machines with a combined capacity of 230,000 tpy of uncoated woodfree paper for commercial printing, book publishing and office applications.

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Koehler Paper upgrades packaging paper development and testing facilities in Oberkirch

 **EUWID +** 05 August 2026

Koehler has added a form-fill-seal machine to its existing packaging paper development and testing facilities in Oberkirch. The new line can manufacture flat bags as well as block-bottom and squarebottom bags in different sizes. Koehler Innovation & Technology has thereby expanded its options of testing paper-based packaging solutions under realistic conditions and assessing their processing properties prior to large-scale production.

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Sami Riekkola leaves Valmet

 **EUWID** + 05 August 2026

Sami Riekkola, **Valmet**'s Executive Vice President, Pulp, Energy and Circularity business area, will leave the company with effect from 22 January 2027 to take on new responsibilities. Mr Riekkola has been a member of Valmet's Executive Leadership Team since 2018. He has led Valmet's Pulp, Energy and Circularity business area since July 2025. Prior to that, he led the company's Pulp and Energy business line and served as President of Valmet's Automation Systems business line between 2018 and 2022.

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Andritz to supply new chipping and debarking line to Lenzing pulp mill

🔗 **EUWID +** 05 August 2026

Pulp and fibre material manufacturer **Lenzing** has placed an order with **Andritz** to deliver a new debarking and chipping line for its pulp mill in Lenzing, Austria. Commissioning is scheduled for the fourth quarter of 2027. In addition to the debarking and chipping line, the scope of supply includes an automation, electrification and instrumentation system. Moreover, Andritz will also provide detailed engineering, procurement, installation and commissioning of the line.

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