

Kunert Gruppe announces price increase for coreboard

19 August 2026

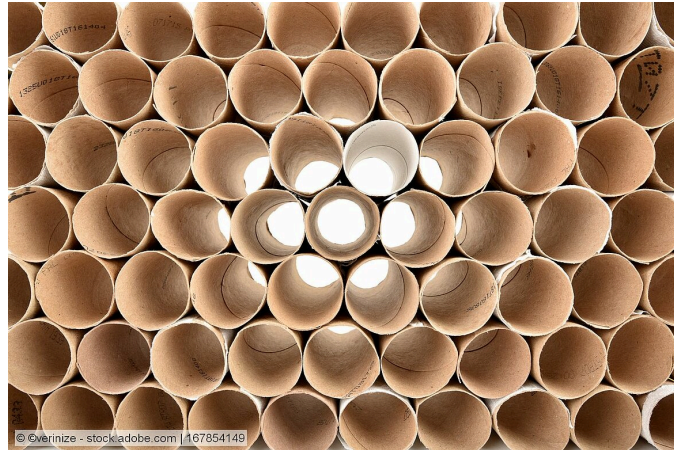
German **Kunert Gruppe** has announced a price increase for coreboard. The increase is set to take effect from 1 September 2026 and applies to both of the group's paper mills, Carl Macher in Germany and Papeteries du Rhin in France.

The company said it would raise prices by at least 10 per cent due to persistently high cost pressures across all areas of production. The development of costs over the coming months remained difficult to predict.

Should the current trend continue, Kunert Group said it could not rule out further price adjustments in the near future.

Carl Macher and Papeteries du Rhin are part of Kunert Gruppe, which operates a total of 17 production sites for coreboard, paper cores and corrugated board in Europe and Asia and employs around 2,000 people. The group also maintains sales offices in Europe and Asia and is a member of a global partner network.

The company says it produces around 330,000 tpy of paper cores, corrugated board and edge protectors as well as around 250,000 tpy of coreboard.



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Stora Enso ramping up Imatra mill after tank explosion

EUWID+ 21 August 2026 Igor Dugandžić

An explosion in a tall oil tank in the early hours of 18 August temporarily disrupted operations at Stora Enso's integrated board and pulp mill in Imatra. Following an assessment of the damage and "remedial measures", production has been gradually ramping up again since 19 August, the company said. No one was injured in the incident.

Following an investigation into the incident, Stora Enso said the explosion was caused by a process disturbance in the tall oil recovery plant. This led to a rise in temperature in the tank. The explosion and subsequent fire damaged structures, equipment and cable trays in the affected area, prompting a partial ramp-down of production.

Stora Enso did not provide any further details on the extent of the damage. The company also declined to specify which installations were damaged or which production units had to be ramped down as a result.

Stora Enso employs around 900 people at the integrated industrial complex in Imatra, close to the Finnish-Russian border in southeastern Finland. The site runs several board machines and fibre lines, with an annual capacity of 1.23 million t of fresh fibre board, primarily liquid packaging board, food service board and folding boxboard, and 1.3 million t of chemical and chemi-thermomechanical (CTMP) pulp.



©Mikko Nikkinen | Stora Enso

Stora Enso did not specify whether board production was affected by the explosion at the Imatra mill on 18 August.

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No production restart for Folding Boxboard Eerbeek after takeover fails

Payment deadlines expired and purchase price was not paid

 **EUWID** + 21 August 2026 [Konstantin Stoll](#)

Dutch fresh fibre board producer Folding Boxboard Eerbeek will not restart operations as previously announced. A company spokesperson told EUWID that plans to begin ramping up GC board production from mid-August were dropped after the proposed takeover fell through.



With the proposed takeover having fallen through, the Eerbeek mill remains dark.

The cartonboard mill in Eerbeek, the Netherlands, had been idle since the company [became insolvent at the end of July](#). Unfortunately, plans to [revive the site under new ownership](#) did not materialise. According to Folding Boxboard Eerbeek, the prospective buyers failed to meet their financial obligations towards the insolvency administrator, who was acting as the seller. The agreed purchase price for the board mill was not paid by the deadline and the insolvency administrator subsequently terminated the purchase agreement, a company spokesperson told EUWID. The planned restart on 17 August therefore did not take place, and there are currently no plans to resume business operations, the spokesperson explained.

This also leaves the 180 employees who had been expected to keep their jobs without any prospect of continued employment for the time being. Insolvency administrator Eric Looijen of Stellicher Advocaten will continue to explore options for selling the mill, its board machine, as well as the remaining raw materials and inventories, according to the company.

GC board production had been set to restart in stages as of mid-August

Folding Boxboard Eerbeek mill, formerly part of the Folbb group, houses one board machine with an annual capacity of around 150,000 t of GC 1 and GC 2 board. The company had announced plans for a fresh start under new ownership at the end of July 2026 and intended to focus in particular on barrier board as a growth market. Cartonboard production was scheduled to resume in stages from 17 August, with the longer-term aim of returning to full five-shift operation. In the meantime, customers had been supplied from existing stocks.

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Domtar to indefinitely idle Howe Sound NBSK pulp mill in Canada

24 August 2026 [Igor Dugandžić](#)

Forest products company Domtar will indefinitely idle operations at the Howe Sound pulp mill and the affiliated Bayview Fibre chipping facility in Port Mellon, British Columbia. The move will remove around 380,000 tpy of NBSK pulp capacity from the market and affect approximately 400 employees.

Domtar attributed the decision to reduced demand from Asia, persistently low prices on the global pulp market and a continued decline in the availability of affordable domestic fibre.

With Domtar announcing an indefinite idling of the mill, the future of the site remains uncertain. The company “will monitor market conditions, domestic fibre availability and the overall business environment, and will evaluate future opportunities if conditions improve,” said Luc Thériault, Domtar’s President – Canada and CEO, Pulp and Wood Products.

Last march, the company also announced the [indefinite idling of its Coosa Pines fluff pulp mill](#) in the US state of Alabama. Towards the end of last year, Domtar had already [closed its Crofton NBSK pulp mill](#) in Canada.



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Saica completes acquisition of Thimm group

 **EUWID +** 26 August 2026

Spanish paper and packaging manufacturer Saica group completed acquisition of German corrugated board manufacturer Thimm as announced in May this year. Thimm is now officially part of the Saica group. The parties agreed not to disclose the purchase price.

The EU Commission gave the green light for the takeover on 24 July, following which Saica began integration of the corrugated board producer with pan-European operations. The clearance by the EU authorities covered a total of nine Thimm corrugated board plants in Alzey, Wolnzach, Eberswalde, Castrop-Rauxel and Northeim, all in Germany, Tychy and Skarbimierz in Poland, Všetaty in the Czech Republic and Sibiu in Romania, as well as the German preprint plant in Ilseburg.

The Garancières-en-Beauce plant in France, which belongs to subsidiary Christiansen Print, is not part of the takeover, a spokeswoman for Thimm informed at the end of July.

With the closing of the takeover, the Thimm sites and their approximately 2,500 employees will become part of the Saica group and continue operations under its ownership. The acquisition will increase Saica's production capacities for corrugated board by up to 1.2 billion m².

Completion of the transaction also marks the exit of the Thimm family, the previous owners, from the business.

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UPM-Sappi joint venture gets green light in USA

 **EUWID +** 26 August 2026

The planned joint venture between UPM and Sappi has cleared another regulatory hurdle. UPM's CEO Massimo Reynaudo announced that antitrust clearance had been granted for the US market. In Europe and the UK, competition law reviews are still underway.

In the USA, the proposed joint venture only includes UPM's Blandin paper mill in Grand Rapids, Minnesota. The site has capacity for 230,000 tpy of LWC. A total of twelve paper mills are to be brought into the joint venture. According to UPM, Europe accounts for around 75 per cent of joint sales, North America around 11 per cent.

The approval procedures are largely on track, Mr Reynaudo explained presenting the latest quarterly figures. UPM's CEO also did not consider the so-called stop-the-clock procedure to be a delay. The EU Commission had initiated an in-depth investigation in phase II of the scrutiny at the end of April. The proceedings were temporarily suspended at the end of May after the Commission requested further information. UPM continues to expect the regulatory procedures to be completed by the end of this year.

UPM and Sappi signed the binding agreement to form the joint venture at the end of May this year.

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Folding carton manufacturer De Vries ceases operation

 **EUWID +** 26 August 2026

Insolvent Dutch folding carton manufacturer Koninklijke Drukkerij De Vries Vouwkartonnage ceased to operate at the end of July after the search for a buyer proofed to be unsuccessful. De Vries had filed for bankruptcy in mid-June.

According to majority shareholder FB Oranjewoud Participaties, which took control of De Vries in 2018, commercial difficulties faced by the company were partly caused by a reorganisation in 2025. The changes led to quality issues and delivery delays, prompting customers awarded to award contracts to competitors.

Although De Vries subsequently resolved the operational problems, it was unable to win back the lost business and its financial position continued to deteriorate. According to the insolvency report, the company's loss widened to €3.1m in 2025 on sales of €24.3m, compared with a loss of €1.8m on sales of €26.8m in 2024.

Management and shareholders continued to seek a solution in 2026, including additional financing and cooperation with other companies. De Vries also began looking for a buyer before the insolvency proceedings were opened.

The District Court of Noord-Nederland opened insolvency proceedings on 16 June and appointed Christian Geffroy from Dommerholt Advocaten as insolvency administrator. Mr Geffroy initially let the business run in order to process open orders and preserve chances of continuation. He held talks with several interested parties, but no agreement was reached with the final potential buyer. As a result, efforts to continue the business failed and production ceased at the end of July. De Vries most recently employed 98 people.

Founded as a printing company in 1874, De Vries later developed into a folding carton producer serving customers in the Netherlands and abroad. It was awarded the Dutch Royal designation in 2016 and had modernised its production facilities only a few years before the insolvency.

After efforts to continue the business failed, De Vries' machinery was put up for sale. Allaoui Graphic Machinery is handling the disposal of the production equipment.

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MM posts “resilient earnings”, but challenging markets weigh on Board & Paper performance

RDM Arnsberg acquisition to deliver synergy effects with MM’s Neuss mill

 **EUWID +** 26 August 2026

Mayr-Melnhof (MM) expects its planned acquisition of Reno de Medici’s (RDM) Arnsberg in Germany board mill to deliver significant synergies in 2027 and 2028. With a capacity of approximately 230,000 tpy, the Arnsberg mill primarily produces GD liner and is strategically located near MM’s Neuss site. MM converted board machine 5 at Neuss to liner production just a few years ago. Presenting the group’s first-half 2026 results, CEO Peter Oswald said that, while the purchase agreement had been signed, the transaction was still awaiting approval from competition authorities.

MM Group “demonstrated resilient earnings development in the first half of 2026, maintaining adjusted Ebitda almost at the prior-year level on a like-for-like basis excluding Tann while achieving a marked improvement compared with the second half of 2025 despite persistently subdued market demand. A €105m contribution from the Fit for Future programme mitigated mainly for lower selling prices in Board & Paper,” Mr Oswald remarked.

MM Board & Paper’s deliveries rising in Europe

The MM Board & Paper division continued to be affected by challenging market conditions, with most of its key figures declining. MM reported persistent pressure in the folding boxboard (GC) segment, in particular, while the recycled cartonboard (GD) markets remained comparatively resilient. The group therefore continued to focus on optimising capacity utilisation and reducing structural costs. Accordingly, sales volumes showed a positive trend thanks to gains in market share for GD and GC board in Europe. CEO Peter Oswald noted that capacity utilisation averaged 87 per cent. GD board machines achieved higher utilisation rates than their GC counterparts, reflecting the continuing overcapacity in the market for primary-fibre cartonboard.

Overall, the CEO described “strong headwinds” when it came to pricing and noted that prices for almost all of the grades sold by the group were much lower than last year. Nonetheless, MM had witnessed a gradual improvement for most grades in the first six months of the year.

MM said it had deliberately reduced overseas business, as the US market had been “less attractive” of late, something Mr Oswald attributed to US tariff policy in particular.

New sheeter for rapid shipments from Kotka

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MM is installing a new sheeter to enhance its “express-delivery offering.” CEO Peter Oswald said that the new sheeter would primarily handle cartonboard from the MM Kotkamills board mill in Finland. The company is also forging ahead with a €100m investment programme at its integrated paper and cartonboard mill in Kwidzyn, Poland. This project is slated for completion in autumn 2026, with the company anticipating that this work will improve earnings by around €30m annually from 2027 onwards. Investments include the installation of a new continuous digester, which is expected to significantly reduce energy consumption, CO₂ emissions and heating costs.

Demand from pharma and healthcare sectors supports earnings

MM Food & Premium Packaging faced persistently subdued market conditions during the first half of 2026. Demand for folding cartons remained weak, while competition stayed intense across most end markets, the company said. However, process improvements, lower fixed costs and lower cartonboard costs supported profitability, helping to offset inflationary pressure from energy, transport and chemical costs. MM reported a modest improvement in order intake in selected markets towards the end of the second quarter.

Additionally, MM’s previously announced investment of approximately €24m in its Romanian folding carton plant, MM Packaging Romania, is on schedule and nearing completion. The site is due to begin commercial production in October.

MM Pharma & Healthcare Packaging maintained its strong momentum in the first half of 2026 despite uneven market conditions. Growth in North America and Ireland, alongside expanding new business with key customers, supported the division’s overall performance, although demand remained subdued in parts of Europe. Strong demand for folding cartons, patient information leaflets and labels used in GLP-1 applications supported growth. This was largely offset by MM’s deliberate withdrawal from lower-margin business. Overall revenue therefore remained broadly stable, while profitability improved further.

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Mayr-Melnhof results				
million €	April - June		January - June	
	2026	2025	2026	2025
Key figures				
Sales	922	988	1,849	2,030
Adjusted EBITDA	96	111	200	231
Operating result	n.a.	n.a.	67	234
Net result	n.a.	n.a.	31	164
Business area review				
MM Board & Paper				
Sales*	470	490	940	1,000
Adjusted EBITDA	23	37	57	70
Operating result	n.a.	n.a.	-10	15
Production, 1,000 t	833	819	1645	1632
MM Food & Premium Packaging**				
Sales*	340	360	684	725
Adjusted EBITDA	50	46	98	97
Operating result	n.a.	n.a.	56	60
Production, in million m ²	507	542	1,019	1,097
MM Pharma & Healthcare Packaging				
Sales*	158	158	319	321
Adjusted EBITDA	24	21	46	40
Operating result	n.a.	n.a.	21	13
Production, in million m ²	234	231	470	465
* including internal sales				
** excl. TANN Disposal				
Source: Mayr-Melnhof				

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Francesco Giannolo new Vice President & General Manager, Consumer Packaging EMEA at Sonoco

 **EUWID +** 26 August 2026

Sonoco has appointed **Francesco Giannolo** as Vice President & General Manager, Consumer Packaging EMEA. Starting his career with Sonoco in 2019, he most recently was Vice President Commercial Consumer Packaging EMEA/APAC. At the start of August, Sonoco has merged its Consumer Packaging activities in a global organisation, led by Ernest Haynes. This new business generates annual sales of \$5.2bn, operates 98 sites and has 11,250 employees.

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Essity to acquire feminine care business in Brazil

 **EUWID +** 26 August 2026

Essity has agreed to acquire Kenvue's feminine care business in Brazil for \$284m on a cash- and debt-free basis. The acquired business generated net sales of around BRL800m (€125m) in the twelve months to 30 June 2026. The transaction is subject to regulatory approval and other customary conditions, including completion of the planned Kimberly-Clark/Kenvue transaction. Closing is expected in Q2 of 2027.

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Södra to sell Danish activities to Brüning

 **EUWID +** 26 August 2026

Swedish forest industry group **Södra** will sell parts of its operations in Denmark to Germany's **Brüning Group**. The transaction covers project sales, interior wood products and trading activities within Södra's bioenergy business. Södra said the divestment was part of efforts to sharpen its focus on core businesses and improve efficiency.

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Stora Enso to discontinue operations at Veitsiluoto sawmill in Kemi

 **EUWID +** 26 August 2026

Stora Enso is planning to permanently close its Veitsiluoto sawmill in Kemi, northern Finland, and transfer pine sawing mainly to its Oulu and Kalajoki sites. The planned closure affects around 60 employees. Veitsiluoto is currently undergoing a temporary production curtailment and, under the current plan, would not restart once this ends in October 2026. Change negotiations are expected to last three weeks. Stora Enso said the proposed closure would have only a minor impact on wood consumption at its Oulu business unit, which also includes the Oulu board mill and sawmills in Oulainen and Kalajoki.

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Alberta Newsprint in Canada diversifies paper production

📄 **EUWID +** 26 August 2026

Canada's Alberta Newsprint Company (ANC) wants to focus less on newsprint and more on other paper grades in the future. According to a statement from the Province of Alberta, the company plans to modernise its paper mill in Whitecourt and diversify its product portfolio. This would allow ANC to reduce its dependence on conventional newsprint. The province did not provide details on which paper grades will be produced in the future and in what proportions.

ANC will invest CAD50m in the modernisation of the mill. The Province of Alberta is supporting the project with more than CAD1.5m from its Investment and Growth Fund. The project is expected to create 13 new jobs, while around 220 existing jobs at the site will be retained, the statement says.

ANC is a joint venture between Whitecourt Newsprint Company Limited Partnership, which is part of the Stern investment group, and forest products company West Fraser Timber. The Whitecourt mill operates an 8.4-m-wide paper machine with a capacity of 747 tpd. In addition to newsprint, the PM produces book paper and high-bright paper grades. The site also operates a thermomechanical pulp (TMP) plant.

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Good operating rates and higher sales at Holmen Board and Paper, but lower Q2 profit

 **EUWID +** 26 August 2026

Holmen Board and Paper sold more paper and board in the second quarter of 2026, but earnings remained well below the previous year's level. Divisional sales increased by just over 2 per cent compared with the same period last year, while deliveries rose by nearly 5 per cent year-on-year. Operating profit, however, fell by around 29 per cent and the operating margin in the second quarter declined from 10 to 7 per cent.

The higher shipments in the second quarter stand out against the backdrop of a persistently difficult market environment. As CEO Henrik Sjölund explained during the results presentation, overall demand for folding boxboard was broadly stable in the second quarter, while demand for paper continued to decline. Nevertheless, Holmen performed markedly better than the market in both paper and board, and Holmen Board and Paper had healthy order books, Sjölund said. Operating rates at its mills were also above the industry average in the second quarter. According to the Holmen CEO, European board producers are currently running at an average operating rate of only around 75 per cent, while Holmen's board machines are operating at comparatively high rates. In paper, where market operating rates are in some cases even lower, Holmen continues to target rates of 85 to 90 per cent.

Looking at the first half as a whole, the higher deliveries in the second quarter were not enough to fully offset the weaker volume development in paper and board at the start of the year. Cumulative Board and Paper deliveries were therefore around 1 per cent below the previous year's level in the first half. Sales fell by almost 7 per cent, while operating profit more than halved to SEK254m. Holmen attributed the decline in earnings mainly to higher energy costs, the weaker dollar and slightly lower paper prices. At the same time, lower pulpwood costs provided some relief.

Holmen group posts solid H1 results, Wood Products spurs red ink

At group level, sales fell by around 4 per cent year-on-year in the first half, while operating profit was down by almost 16 per cent. Net profit declined by just under 17 per cent. Nevertheless, Holmen remained clearly profitable, with Ebitda of almost SEK2.23bn and net profit of nearly SEK1.13bn in the first half. The operating margin stood at 14 per cent, compared with 16 per cent last year.

The weaker group result partly reflected poorer performance in the other two major divisions, Wood Products and Forest. In the Forest business, Holmen reported a 13 per cent decline in sales in the first half, reflecting lower selling prices and reduced volumes. Higher harvesting costs also weighed on earnings.

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In Wood Products, Holmen remained in the red in the second quarter after already posting a loss in the first quarter. The division therefore ended the first half firmly in loss-making territory. After an operating profit of SEK20m in the previous-year period, Wood Products recorded an operating loss of SEK146m. Holmen attributed the deterioration mainly to lower revenue from the sale of wood chips and biofuels as well as the weaker dollar. Divisional sales were around 4 per cent lower year-on-year on virtually unchanged deliveries.

Renewable Energy provided a counterweight to Holmen's weaker industrial earnings in the first half of 2026 and made a significant contribution to the group's earnings. Higher electricity prices lifted sales to SEK612m and operating profit to SEK354m, up from a small loss a year earlier.

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Holmen results				
million SEK	April - June		January - June	
	2026	2025	2026	2025
Key figures				
Sales	5,632	5,573	11,545	22,056
EBITDA	1,049	1,176	2,227	4,733
Operating result	689	807	1,516	3,270
Net result	510	602	1,127	1,354
Business area review				
Board and Paper				
Sales	3,663	3,577	6,983	7,474
EBITDA	494	619	896	1,401
Operating result	254	358	422	886
Deliveries, 1,000 t	365	348	698	707
Forest				
Sales	2,221	2,539	4,531	5,111
EBITDA	480	519	972	1,002
Operating result	460	511	972	1,007
Renewable Energy				
Sales	194	68	612	198
EBITDA	114	-6	435	51
Operating result	74	-33	354	-4
Wood products				
Sales	1,094	1,101	2,074	2,162
EBITDA	-3	74	-43	126
Operating result	-55	20	-146	20
Source: Holmen				

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German recycled containerboard market faces fresh price hike plans

No clear trend emerges in folding boxboard market in August

EUWID + 26 August 2026

Companies active in Germany have raised the prospect of additional mark-ups for recycled corrugated case material from September. Announcements by international integrated groups that also applied to the German market had already been in place since the end of July. Domestic producers of brown and white recycled corrugated case material grades have now followed suit, notifying customers of their own plans to charge more.

EUWID sources continue to give mixed assessments of developments in Germany's folding boxboard (GC) market in August, with insiders differing in their views on lead times, price trends and the present situation facing the ailing cartonboard producer Folbb. Demand for unlined chipboard and white-lined chipboard (GD) is largely described as solid, with momentum tending to come more from Europe than the domestic market. Recycled cartonboard manufacturers may seek price increases given that they view prices as insufficient.

German manufacturers join calls for higher recycled containerboard prices

Following in the footsteps of major integrated paper and corrugated board manufacturers that outlined plans to invoice more for recycled corrugated case material across Europe, including Germany at the end of July, the majority of German producers have now followed suit. Towards the middle of August, paper producers said that they had notified their customers of their plans. Insiders from the corrugated board sector confirmed to EUWID that there was growing support for these price hikes among German paper mills. Most announcements envisage a further increase in prices for brown recycled corrugated case material as well as coated and uncoated white-top testliner from 1 September. In most cases, manufacturers are seeking to tack on €80-100/t.

Paper mills described the latest push for higher prices as being driven by rising recovered paper, logistics and energy costs. Above all, though, they underscored strong order books, particularly for brown grades where machines continue to operate at very high capacity utilisation. Some producers said that they could no longer supply additional volumes of brown grades and have begun allocating tonnage again.

White-top testliner suppliers contacted by EUWID viewed demand as more subdued than for brown grades. Paper mills had failed to secure a second price increase for white-top testliner in the first half of the year and now said that they needed to make up lost ground in the forthcoming negotiations.

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Individual companies' attempts to raise prices by €80/t from 17 August had been "quickly taken off the table," insiders along the supply chain agreed. This reportedly applied both to integrated mills and to material sold on the open market in Germany, sources told EUWID. For their part, corrugated board producers said that they saw no reason to renegotiate prices for deliveries already confirmed during August, the peak holiday period. "We're talking about September," one buyer stressed.

In August, sources reported stable prices for brown and white recycled corrugated case material grades in Germany. Buyers' earlier hopes of obtaining discounts on August deliveries were undermined by paper mills' strong operating rates.

The corrugated packaging industry has reacted negatively to paper producers' price plans. Insiders said that they had not yet been able to pass on increases from the first half of the year to their customers to the extent hoped. Compounding matters, packaging producers are also facing announcements of higher prices for brown and white-top kraftliner.

Mixed picture of folding boxboard market in August

Assessments of the folding boxboard (GC) market in Germany are mixed in August. A few suppliers reportedly have lead times going up to 10 weeks for GC 2. However, other producers are reportedly able to deliver extremely quickly in less than four weeks, while others report normal lead times of four to six weeks.

The long lead times are attributed only to a limited extent to the situation at Folbb and any resulting volume shifts. Sources attribute this to maintenance stoppages or downtime "intended to support the market." A few companies also pointed to changes in production cycles towards GC 1, adding that stronger demand for this grade is connected to higher cigarette consumption and lower price sensitivity of buyers purchasing premium products.

Accounts of third-quarter prices are similarly mixed. A few companies said that energy surcharges had not only been withdrawn, but that additional concessions had been made. This was not true of all GC suppliers, but neither was it the case for just a few mills. That being said, none of these statements made in August was confirmed by all other EUWID sources, leaving no uniform picture of the GC market.

Manufacturers are reporting largely decent demand for unlined chipboard and GD, although enquiries tended to come from other European countries rather than Germany itself. Market insiders said that this was connected to the main holiday month while also reflecting a longer-term trend.

Talking about Germany specifically, sources said that the usual amounts had been ordered before the holidays and the first allotments had been made for the period after the summer break, too. However, a clearer assessment will

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only be possible once the summer holidays are over. Producers says that current prices remained unsustainable and further demands for price hikes might be announced soon.

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German Cabinet approves draft national implementation of EU Deforestation Regulation

 **EUWID +** 26 August 2026

The German government adopted the draft national implementation of the European Union's Deforestation Regulation (EUDR) tabled by the Federal Ministry of Agriculture at the cabinet meeting on 12 August. The draft provides for implementation of the EU regulation without modification in Germany. This means that the German government does not plan to impose any obligations that go beyond the requirements of the EU Commission.

In the next step, the law will be presented to the German Bundestag. The provisions of the Deforestation Regulation will apply in the EU from the end of 2026, including to manufacturers of any paper packaging with primary fibre content.

After implementation was postponed by yet another year, the EU Commission, Council and Parliament agreed in the trilogue to schedule the start for large and medium-sized economic players on 30 December 2026. For micro and small enterprises, the application phase will start on 30 June 2027.

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Bvdm still sees critical unresolved issues in national EUDR implementation in Germany

 **EUWID +** 26 August 2026

The German printing and media industry association (Bvdm) has again voiced criticism following the German government's approval of the draft law on the national implementation of EUDR. The association warns that the draft does not adequately implement the proposed relief for downstream supply chain companies, leaving "significant legal and commercial risks for printers who purchase paper and board within the EU and use them to produce print products covered by the EUDR."

The Bvdm strongly believes that EUDR must not leave companies at the end of the supply chain liable for something that they can "neither control nor understand". The German government must therefore ensure that the relief intended for downstream companies at EU level is not undermined by disproportionate national sanctions and enforcement regulations, the association demands.

As part of the revision of Deforestation Regulation, which will apply to large and medium-sized enterprises from 30 December 2026 in a first step, the EU focused on the "first operator" principle, placing the EUDR's due diligence obligations mainly on operators placing applicable products on the EU market for the first time.

The Bvdm expressly welcomed the approach, as companies downstream in the value chain usually do not have a direct supply relationship with producers of the raw material (wood) contained in the paper or board. Full traceability of the wood fibre contained in paper and board to its origin is hence not possible for those companies.

Facilitation of downstream supply chain undermined by sanctions

The Bvdm had already pleaded for "careful revision" of the draft bill at the end of July and welcomes the relief for downstream supply chain companies from due diligence obligations, as provided for in the revised EUDR. Nevertheless, the association sees the risk that the penalties and sanctions set out in the approved draft threaten to undermine the relief. The association warns that companies should not face the risk of their products becoming unsaleable or having to be destroyed, or even of criminal liability if it is subsequently found that they contain a small proportion of fibre of problematic origin.

In its statement, the Bvdm therefore urges the German government to advocate at EU level to abolish downstream due diligence obligations in case of mere suspicion of non-compliance. In the context of national enforcement, it must be made clear that downstream companies cannot be held criminally responsible for violations in upstream supply chains. Fines should also only be imposed in the case demonstrable misconduct.

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The association is also critical of the potential ban on placing products on the market or confiscating and, if necessary, destroying them. For print shops, even short delays can make time-critical advertising materials, packaging or publications commercially worthless. It is therefore calling for clear guidelines on the proportionality of sanctions. The planned regulations in their current form are “much too far-reaching”, according to the Bvdm.

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Ample supply leads to price cuts for ordinary recovered paper grades in France

Domestic demand softens in August while exports hold steady

 **EUWID** + 26 August 2026

Due to sufficient supply and high recovered paper stocks at paper mills, prices for ordinary recovered paper grades in France edged lower in August. There was some downtime in the paper industry, but many machines continued to operate without interruption. Apart from that, the usual summertime calm prevailed on the recovered paper market. In a few instances, export deals for sorted graphic paper for deinking became a little more expensive. However, prices for the other recovered paper grades tracked by EUWID were unchanged in August.

EUWID Price Watch Recovered Paper France				
August 2026				
Prices in € per tonne	August 2026	July 2026	June 2026	August 2025
Mixed paper and board (1.02)	25 - 35	35 - 45	35 - 45	25 - 35
Supermarket corrugated paper and board (1.04)	60 - 70	70 - 80	70 - 80	70 - 80
Old corrugated containers (1.05)	80 - 90	90 - 100	90 - 100	90 - 100
Sorted graphic paper for deinking (1.11)	95 - 105	95 - 105	85 - 95	95 - 105
Intra-Europe exports from France (1.11)	95 - 105	85 - 105	85 - 95	105 - 120
Coloured letters (2.06)	135 - 145	135 - 145	135 - 145	165 - 185
Multi printing (3.10)	170 - 180	170 - 180	170 - 180	195 - 205
White woodfree uncoated shavings (3.18.01)	335 - 350	335 - 350	335 - 350	370 - 385
Prices in € per tonne ex works, material sorted and in bales.				
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The tide has turned on the French recovered paper market in August. Prices for ordinary grades decreased for the first time in several months. Market participants report that suppliers and buyers quickly agreed to a mark-down of €10/t for mixed paper (1.02), supermarket paper and board (1.04) and old corrugated containers (1.05). An influential player had pushed for price reductions in early August, setting the tone for the rest of the holiday month.

Insiders attributed the price cuts to high recovered paper stocks at several corrugated case material mills. As a result, even mills that continued to produce normally during the summer, which was the case for major players, required less material. One buyer had been forced to temporarily halt production on a PM in July because of a technical problem and had therefore built up recovered paper stocks. A different paper producer was in a similar situation after a maintenance shutdown at one of its mills in July. Moreover, one insider said that demand was somewhat subdued after wildfires forced a temporary production stoppage in July at Smurfit Westrock's Cellulose du Pin kraftliner mill, which uses recovered paper alongside pulp. This had increased the supply available to other buyers in the south of the country, he explained.

In addition, a few smaller paper mills had idled production in August and therefore required less recovered paper. Others are planning their maintenance downtime for September or October and were already starting to slightly taper volumes, EUWID was told. As a result of all these factors, overall demand for ordinary recovered paper grades declined in August.

Waste management firms felt that collection volumes fell slightly on the whole this month. Due to the summer holiday season, collection volumes were shifting from cities towards vacation destinations, though this was only true for material from households. Collections from industrial sources were weaker, one supplier noted. Despite limited supply, waste management firms also confirmed that availability of ordinary recovered paper grades was sufficient and good during August.

Far East export prices remain unchanged

Suppliers described the export business to Asia as decent, with robust, stable demand in the current month. One respondent said she had no problem selling all planned volumes. Nevertheless, it appears that exports could not fully offset the weaker demand on the domestic market. The French recovered paper market is generally less export-oriented than other European markets. Moreover, owing to high quality requirements, it was not possible to export all material, in particular mixed paper from household collections, explained one representative of a waste management firm.

Prices for exports to Asia remained stable at the prior-month level. Asian buyers were paying up to €115/t ex works for OCC in August. This price was well above the levels paid in France, where the grade was selling for up to €90 or sometimes €95/t ex works.

After the price reduction in August, several market participants now expect stable prices for ordinary recovered paper grades in September. Some suppliers opined that other countries should first follow suit with a price reduction before players discuss any further price cuts in France. Prices on the domestic market were already very low, they said. One insider also pointed out that price hikes have been announced on the corrugated case material market, so a further decline in recovered paper prices would send the wrong signal.

Deinking grades see slight mark-up in export market only

During summer, arisings of deinking grades are especially low. To prevent shortfalls, buyers in France had been willing to pay higher prices for sorted graphic paper for deinking (1.11) in July. In August, sufficient material was now available, said one buyer. Prices remained stable in France this month.

Quotes for exports of this grade to neighbouring countries were often unchanged but occasionally ticked slightly higher. Overall, price levels here also inched €5-10/t higher over the past two months. Demand was described as stable and is now said to be slightly higher than a few months ago.

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There was good interest in coloured letters (2.06) during August, suppliers reported. Tissue producers were purchasing as usual and there were limited volumes on the market, said one seller. Exports to Asia were also taking place. Against this backdrop, prices were unchanged from the previous month's level. One supplier expressed hope there would be a mark-up in the coming month.

Similarly, there were no price changes in August for multi printing (3.10) and white woodfree uncoated shavings (3.18.01). Demand was at the typical levels, EUWID was told.

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UK recovered paper prices edge higher despite quiet August

Rising freight rates and weaker dollar could curb Asian demand

 **EUWID** + 26 August 2026

In the middle of the holiday season, the UK recovered paper market was quiet. However, prices for mass brown grades edged higher in August. Demand from Asia and Turkey, together with higher PRN/PERN prices, provided support, while overall supply remained sufficient. The outlook for the coming weeks was less certain, though, as higher freight rates, container bottlenecks and a weaker US dollar could make exports to Asia more difficult.

EUWID Price Watch Recovered Paper UK August 2026				
Prices in £ per tonne	August 2026 £	August 2026 €*	July 2026 £	August 2025 £
Mixed paper and board (1.02)	57 - 70	67 - 82	55 - 70	50 - 70
Mixed paper and board (1.02), export	60 - 74	70 - 87	57 - 78	65 - 80
Old corrugated containers (1.05)	100 - 112	117 - 131	92 - 108	90 - 98
Old corrugated containers (1.05), export	105 - 116	123 - 136	105 - 112	95 - 105
Magazines (1.06) ¹⁾	95 - 130	111 - 152	90 - 125	90 - 130
Sorted graphic paper for deinking (1.11) ¹⁾	85 - 100	99 - 117	85 - 95	80 - 105
Newspapers (2.01) ¹⁾	95 - 120	111 - 140	95 - 115	95 - 120
Sorted office paper (2.05)	135 - 143	158 - 167	130 - 135	155 - 168
White woodfree letters (3.05) ²⁾	255 - 270	298 - 316	255 - 270	-
Multigrade	140 - 153	164 - 179	140 - 150	160 - 175
White newsprint (3.14)	190 - 220	222 - 257	190 - 220	180 - 210
White woodfree uncoated shavings (3.18.01)	285 - 345	333 - 404	280 - 345	330 - 380
* Exchange rate as of 24 August 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.				
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Business on the UK recovered paper market was relatively subdued in August during the holiday period. Contrary to the trend seen across much of Europe, however, prices for mass packaging grades increased slightly, driven mainly from exports to the Far East.

Collection volumes were still comparatively high at the beginning of the month, according to some market participants. Sources attributed this partly to the delayed impact of the football World Cup. Arisings subsequently declined as the month progressed, in line with the usual seasonal pattern during the August holidays. Several fires also resulted in recovered paper volumes being lost, including the blaze at Smurfit Westrock's Townsend Hook site in Kent. However, this did not cause any noticeable shortage on the market.

Demand for the mass grades for packaging applications remained generally good. Demand for old corrugated containers (OCC, 1.05) was particularly strong in Asia, pushing prices higher. Turkish paper mills were also active buyers, while some UK and continental European mills held back in response to the higher prices. However, those that did eventually purchase material also had to pay more.

PRNs/PERNs support prices

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According to market participants, prices for 1.05 received an additional boost from higher prices for packaging recovery notes and packaging export recovery notes (PRNs and PERNs), which temporarily rose to around £10/t. Sea container rates remained low for many Far Eastern destinations, supporting exports to countries including Vietnam, Thailand and Malaysia.

Freight rates to India and Pakistan, by contrast, had risen significantly in some cases, partly due to bottlenecks at transshipment hubs, where containers are transferred to smaller feeder vessels serving Indian ports. Transshipment demand has been particularly high in Colombo as cargo flows have been rerouted because of the conflict in the Middle East. Logistics company Kühne+Nagel reported in mid-August that yard utilisation was high and feeder schedules were being disrupted, with the port operating close to its capacity limits.

There were also substantial delays at Chinese ports following several tropical storms. According to Seatrade Maritime, delays affected around 2.4 million TEU of container shipping capacity in Asia at the beginning of August. Backlogs were reported particularly along China's east coast, from Shanghai and Ningbo southwards.

At the same time, demand for container capacity on routes from Asia to Europe and the US remains high. Market participants therefore believe that shipping lines could increasingly return empty containers to Asia rather than making them available for low-value export cargoes from Europe. For recovered paper exporters, this could mean significantly higher freight rates, reduced container availability or both.

Exchange rates are providing an additional headwind. The US dollar has recently weakened considerably against sterling and the euro. As transactions with Asian customers are often settled in US dollars, UK and European recovered paper has become more expensive for buyers in these markets. This could curb Asian demand for material from the UK and continental Europe.

Against this backdrop, some market participants believe Asian paper producers are currently buying additional volumes, in part to build inventories.

UK mills prefer mixed paper

Mixed paper (1.02) also became more expensive on the UK market. One reason was that some domestic paper producers switched to mixed paper in response to higher prices for 1.05. Paper mills in continental Europe also showed buying interest. Many buyers initially resisted the higher asking prices, although some eventually accepted increases as the month progressed.

A slight upward trend was also reported for supermarket corrugated paper and board (1.04, 80/20), with prices edging up by a few pounds. Most prices were most recently in a range of £80-90/t.

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Supply of deinking grades remained tight. Prices were nevertheless mostly stable or increased only slightly. Although the forthcoming conversion of the UK's last newsprint machine is already influencing the market, many market participants said August remained largely "business as usual". Some also reported increased activity, possibly as customers sought to work through their order book.

Against this backdrop, UPM's plans to produce newsprint at its Caledonian mill attracted considerable attention. The mill uses primary fibre and operates its own mechanical pulp production facility. Market participants therefore assume that the new newsprint grade will also be produced without recovered paper. No direct impact on demand for deinking grades is expected for the time being.

Woodfree grades remain firm

Further upward pressure on prices was reported for woodfree recovered paper grades suitable for tissue production. Demand was good both in the UK and on export markets. Most UK tissue producers were said to be busy, with one mill continuing to increase the recovered paper throughput at its stock preparation plant.

Producers of graphic papers and Asian paper mills were also buying UK tissue grades. Prices for sorted office paper (2.05) and multigrade therefore continued to rise. In particular, the lowest price levels were said to have disappeared from the market.

For September, many market participants expect the market as a whole to start off the month broadly stable. However, if conditions for exports to Asia deteriorate significantly, prices for the mass brown grades in particular could come under downward pressure.

On the other hand, additional demand from UK paper mills could support the market. One producer that is adding new containerboard capacity recently stepped up its buying activity and, according to market sources, has been particularly active in seeking supply contracts with retail chains. Further changes in retail supply arrangements are also being reported, which could create some nervousness in the market.

Market attention is also increasingly shifting to the registration and accreditation for the PRN/PERN system. Companies participating in the system must renew their registration or apply for accreditation by 30 September.

The process was the source of considerable disruption and uncertainty last year, as many companies did not hear back from the authorities until very late. Some market participants contacted by EUWID fear that the process may not run smoothly this year either.

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FSC and PEFC adapt EUDR modules to new requirements

 **EUWID +** 26 August 2026

The international forest certification schemes FSC and PEFC have adapted their EUDR modules to the latest changes to the EU Deforestation Regulation. While FSC has already brought the revised requirements into force, PEFC is currently consulting on a new version of its EUDR due diligence system. In PEFC's case, the changes go beyond simply aligning the module with the amended EUDR and also cover monitoring, audits and information requirements.

The Forest Stewardship Council (FSC) has adapted its Regulatory Module to the latest simplifications to the EU Deforestation Regulation (EUDR). The revised versions of the relevant addenda to the Forest Management and Chain of Custody standards have been in force since 17 August 2026.

The changes include new user categories aligned with the latest EUDR simplifications. Requirements relating to due diligence and risk assessment have also been reduced for certain user groups. New overview tables are intended to make it clearer which requirements apply to the respective user groups.

FSC explained it had introduced the revised add-on standard with immediate effect in order to give users as much time as possible to implement the module before the EUDR becomes applicable.

The Programme for the Endorsement of Forest Certification (PEFC) is also adapting its system to the amended EUDR requirements. At the end of July, the certification organisation launched a public consultation on a revised version of its EUDR Due Diligence System (DDS) Module Standard. The consultation runs until 25 August 2026. The PEFC Chain of Custody Working Group will subsequently review the comments received and prepare the final version.

PEFC first published its EUDR DDS module in 2024. The voluntary add-on standard can be used by companies holding PEFC Chain of Custody certification to support them in meeting EUDR requirements. The revised version takes particular account of the changes introduced by Regulation (EU) 2025/2650 and is also intended to strengthen the integrity and monitoring of the certification system.

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Europe's paper industry sticks to its demand to re-include print in the EUDR's scope

German paper association sees regulatory asymmetry regarding packaging

 **EUWID** + 26 August 2026

Since the EU reached an agreement on the repeated postponement of the application of the EU Deforestation Regulation (EUDR) in a trilogue, printed products have no longer been covered by the EUDR's scope. The EUDR requirements will apply from the end of this year, but not to printed products such as books, magazines and brochures. The European paper industry has opposed this exclusion. As part of the consultation on the European Commission's simplification measures in the first half of 2026, industry associations representing the European paper and packaging sector renewed their objections.

In a statement submitted through the EU's "Have your say" web portal, Cepi, the Confederation of European Paper Industries, recommends the Commission to include printed products in the scope of EUDR. In its statement, the confederation once again underlined that this exclusion would undermine the level playing field between EU and non-EU operators, increasing the risk of market distortions down the line.

Cepi also points out that the exclusion risks could have a significant environmental impact, notably by increasing the use of raw materials sourced from deforested areas. This could occur if production of such products is relocated outside the EU and is followed by the import and the printed products are subsequently imported and sold in the EU without any control on their origin.

Cepi refers to a central requirement stipulated in the Commission Staff Working Document accompanying the delegated act on the scope. According to the European Commission, the embedded commodity share of the finished product – pulp, in the case of paper and printed products – must exceed 75 per cent.

"This is clearly the case for printed products," Cepi says. However, this is a draft and not a legally binding document. An EUWID request for comment from the European Commission had not been answered by the time of publication.

"If the exclusion of printed products is maintained, EU-based paper manufacturers will remain bound by the requirements of the Regulation, while imported printed products will be exempt from any due diligence and traceability obligation, hampering the competitiveness of European companies in the global market," criticises Cepi.

Various associations and The Navigator Company support Cepi's demands

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This opinion was also confirmed by the association of German paper mills Die Papierindustrie. The German paper industry already advocated the re-inclusion of printed products in the scope of the EUDR earlier on. "From the point of view of the paper industry, this is a missed opportunity: A regulatory asymmetry arises because paper as a raw material and many paper-based products remain covered (e. g. packaging under HS 48), while printed products are left out," the association criticises.

According to Die Papierindustrie, the scope gap leads to a potentially significant competitive disadvantage: printed products, which can be produced more cheaply outside the EUDR obligations, hit an EU market where European companies have to comply with strict proof and due diligence obligations for comparable wood/paper flows.

Austropapier, the association of the Austrian pulp and paper industry, and Fepe, the federation representing envelope producers, also support this viewpoint.

The Navigator Company (TNC) likewise posted a statement on the EU web portal: "Printed products should remain within scope, as they are direct derivatives of paper and pulp commodities already covered by the EUDR and typically contain more than 75 per cent forest-based material." According to TNC, excluding printed products from scope creates a clear inconsistency in the value chain and opens the door to downstream leakage: both existing production outside EU and any potential relocation of EU production abroad will be incentivised.

TNC covers the integrated value chain from forest management to pulp production up to the manufacture of paper and packaging. Its range of paper primarily includes uncoated fine paper and kraft paper for packaging.

Paper industry recommends the inclusion of bamboo in the scope of the EUDR

Cepi, Austropapier, The Navigator Company and tissue producer Wepa advocate the inclusion of bamboo in the scope of application of the EUDR. Cepi underlines that wood products could be replaced with bamboo-based products that are not subject to EUDR due diligence requirements. Therefore, excluding bamboo risks shifting market demand towards an unregulated commodity with documented land-use impacts. In this context Austropapier speaks of a "regulatory loophole".

The Navigator Company also sees the risk of market distortion should customers increasingly choose bamboo instead of wood fibres.

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UK recovered paper consumption falls to lowest level in almost 40 years in 2025

Export dependence increases as shipments to India rise by 50 per cent

 **EUWID** + 26 August 2026

The UK recovered paper market saw diverging trends in 2025. While collection volumes edged up to 6.4 million t, demand from domestic paper and board mills declined markedly. Recovered paper consumption by UK producers fell by 5 per cent to just under 2.5 million t, the lowest level in almost 40 years, according to the Confederation of Paper Industries' (CPI) annual review. At the same time, exports increased by more than 5 per cent to nearly 4 million t.

The decline in recovered paper consumption went hand in hand with lower paper and board production in the UK. The latter fell by 3.4 per cent to 3.2 million t in 2025, its lowest level in 70 years, the CPI wrote. Only 38 per cent of recovered paper collected in the UK was used by British paper and board producers in 2025.

Developments varied between the individual recovered paper grades. While consumption of mixed paper was just slightly below the 2024 figure, demand for woodfree grades fell by almost one fifth. According to CPI, this was partly due to capacity being taken offline for upgrading measures.

India drives UK recovered paper exports

Lower demand from domestic paper mills was offset by higher exports. The UK exported almost 4 million t of recovered paper in 2025, more than 5 per cent above the previous year's level.

India was the main driver of export growth. Shipments to the country increased by more than 50 per cent to almost 1.4 million t. The higher volumes sent to India offset lower exports to other parts of Asia and to the EU. India accounted for 35 per cent of UK recovered paper exports, and thus converted as much UK recovered paper as the rest of Asia combined.

Despite lower domestic consumption, the recycling rate for paper and board reported by CPI increased. With collection volumes of 6.4 million t and around 9.3 million t of paper, board and paper products placed on the UK market, the recycling rate rose to 69 per cent, up from 66 per cent in the previous year.

Pulp consumption edges higher in 2025

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Despite the major role played by recovered paper, pulp had a share of 27 per cent in the UK's total raw material consumption. UK paper and board mills consumed 883,000 t of pulp, almost 1.6 per cent more than in the previous year.

Demand for the different pulp grades, however, moved in opposite directions. While consumption of sulphate bleached hardwood pulp rose by more than 10 per cent, the usage of sulphate bleached softwood pulp fell by more than 7 per cent. CPI also notes growing interest in alternative fibres from annual crops.

Most of the pulp converted in the UK is being imported, with Sweden and Brazil being by far the most important suppliers. In 2025, Sweden accounted for nearly 80 per cent of UK softwood pulp imports, while Brazil supplied over 70 per cent of hardwood pulp imports. Other important suppliers include Uruguay, Portugal, Finland and Spain.

Only two UK paper mills produce mechanical pulp themselves from domestic wood: Holmen Board and Paper in Workington and UPM Caledonian in Irvine. Both mills process mainly low-grade wood from Scotland and northern England into mechanical pulp for their own paper or board production.

New recycling rules aim to safeguard recovered paper quality

Several reforms of UK recycling and packaging policy continued to move forward in 2025. These included in particular packaging Extended Producer Responsibility (pEPR) and the Simpler Recycling requirements in England.

CPI particularly welcomes the separate collection of paper and board envisaged under Simpler Recycling in England, arguing that this should improve the quality of recovered paper available to paper mills.

The association was also involved in developing the Recyclability Assessment Methodology (RAM). According to CPI, it succeeded in securing a 5 per cent threshold for plastic content within the paper and board category and also has a seat on Defra's RAM Technical Advisory Group.

End-of-waste: CPI says recycling is only completed in the pulper

The point at which recovered paper should cease to be classified as waste and attain product status remains controversial. CPI opposes proposals to move the end-of-waste point to an earlier stage in the recycling process. In its view, actual material recovery only takes place in the pulper at a paper mill. CPI argues that an earlier end-of-waste point could create a two-tier recycling system and put domestic reprocessors at a disadvantage.

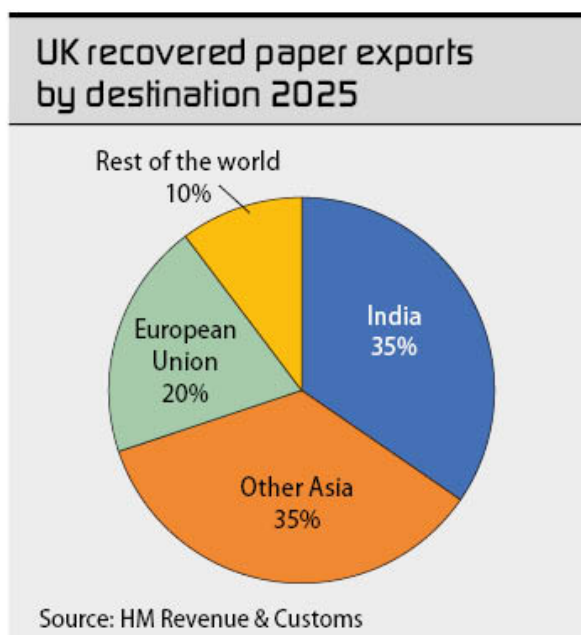
For 2026, CPI also intends to push for the planned reform of the PRN/PERN system to create a level playing field between domestic reprocessing and recovered paper exports.

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Fibre consumption UK 2025			
in million t	2025	2024	% 25/24
RCP Total	2.491	2.625	-5.1
Mixed (incl. News)	0.881	0.892	-1.2
Corrugated	1.306	1.357	-3.8
Woodfree	0.304	0.375	-18.9
Pulp Total	0.883	0.869	1.6
Sulphate Bleached Softwood	0.292	0.315	-7.3
Sulphate Bleached Hardwood	0.385	0.348	10.8
Other grades	0.206	0.206	-0.3

Source: CPI



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UK paper production falls to 70-year low in 2025

Sheetfeeding proves comparatively resilient

 **EUWID** + 26 August 2026

Structural decline and a difficult macroeconomic environment pushed several indicators for the UK paper industry to historic lows in 2025. Paper and board production fell to its weakest level in 70 years, while deliveries by UK paper manufacturers also reached a historic minimum.

On a positive note, the Confederation of Paper Industries (CPI) highlighted in its annual review that 2025 was the first year since 2020 without further capacity losses in papermaking. From 2026 onwards, the association expects major changes to the country's production structure with the start-up of new containerboard capacity.

Apparent consumption falls after temporary recovery

Following a temporary improvement in 2024, apparent consumption of paper and board in the UK declined by 1.6 per cent to just under 6.6 million t in 2025. According to CPI, consumption has now remained at levels last seen in the 1960s and 1970s for the past two to three years.

Structural contraction remained particularly pronounced in printing and writing papers, where consumption across all grades fell by 10 per cent. The decline in woodfree papers was especially sharp at well over 10 per cent for both coated and uncoated grades.

The packaging segment performed better, driven primarily by areas outside the corrugated sector. Consumption of packaging papers increased by 27 per cent to just over 261,000 t, while the usage of cartonboard and other board for packaging rose by 4 per cent to just over 1 million t.

By contrast, the much larger market for corrugated case material remained broadly stable at 2.4 million t. Demand for tissue parent reels declined slightly to just under 1.1 million t.

While consumption of primary papers and boards stood at 6.6 million t, the net inflow of converted paper and board products and paper-based transit packaging adds around 2.6 million t annually. Including these volumes, approximately 9.3 million t of paper and board were placed on the UK market in 2025, after 9.5 million t in the previous year.

Paper production falls to 3.2 million t

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Domestic paper and board production fell even more sharply than consumption in 2025. UK paper and board manufacturers produced a total of 3.2 million t, down by more than 3 per cent year-on-year. The last time UK output was lower was in 1954, when production stood at 3 million t.

Corrugated case materials production fell by 3 per cent to 1.4 million t. The decline was particularly pronounced for recycled fluting, where output dropped by 6 per cent to around 671,000 t. Testliner production, by contrast, remained broadly stable at around 721,000 t. Tissue parent reel output decreased by 2 per cent to just over 701,000 t.

Deliveries by UK paper manufacturers also fell to historic lows. Domestic sales declined by 3 per cent to 2.5 million t, while exports fell by almost 2 per cent to 724,000 t.

Domestic deliveries of corrugated case materials decreased by 3 per cent to 1.3 million t, while exports fell by 7 per cent. Developments within individual grades varied, however: exports of recycled fluting dropped by more than 27 per cent, while testliner exports increased by almost 8 per cent.

Corrugated board production proves more resilient

In contrast to papermaking, UK corrugated board production proved comparatively resilient. Output by CPI member companies increased slightly to around 4.3 billion m² in 2025. As 2025 had one fewer production day than the leap year 2024, the increase was somewhat stronger on a weekly basis: effective weekly production rose by almost 1 per cent to around 86.5 million m². Average board weight stood at 447 g/m².

The sheet-feeding business performed even better. Production increased by 2 per cent to 1.2 billion m², surpassing even the 2022 level, when the sector had benefited from the post-pandemic demand surge. Effective weekly production increased by 3 per cent to around 23.7 million m², with an average board weight of 462 g/m².

Import dependence remains high

The decline in domestic production was not matched by a similar fall in imports. While UK paper and board production dropped by more than 3 per cent, imports declined by only 0.2 per cent to just under 4.2 million t. UK paper mills therefore continued to account for only around 37 per cent of domestic consumption.

This development was particularly evident in corrugated case materials. Although consumption remained broadly stable at 2.4 million t, deliveries by UK manufacturers declined. Additional imports of around 30,000 t largely offset this fall. CPI therefore explicitly described the resilience of the UK corrugated case materials market as import-led.

The EU remained by far the most important trading partner for the UK paper industry. By value, around 66 per cent of UK paper and board imports came from the EU-27 in 2025, with a further 20 per cent originating in Asia. Conversely,

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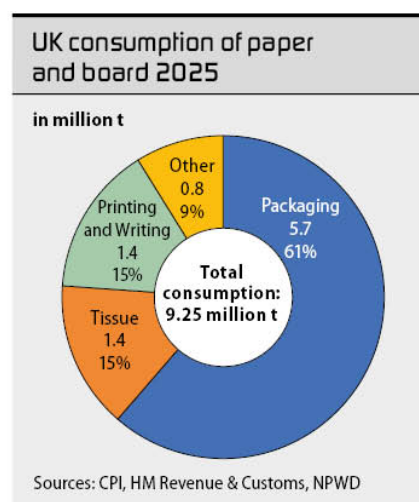
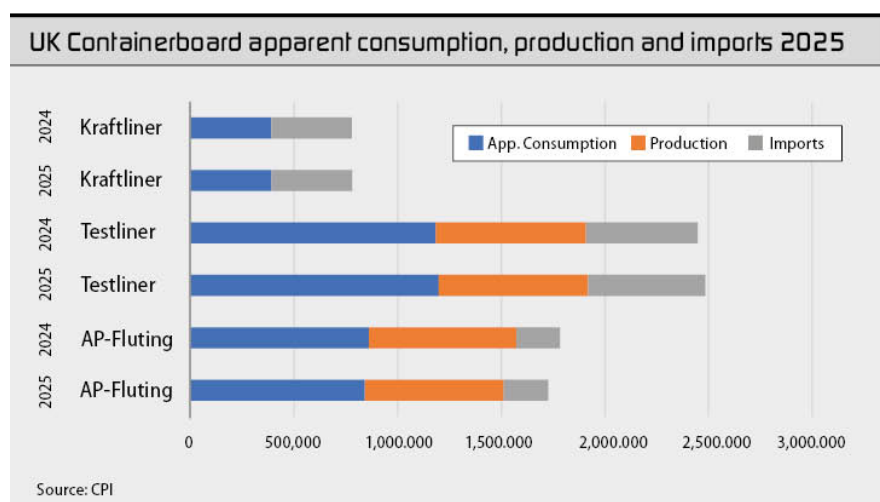
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60 per cent of UK exports went to the EU. The total value of imports amounted to £7.9bn, compared with exports worth £4.3bn.

Energy costs remain a burden

Energy costs remained one of the biggest challenges for the UK paper industry in 2025. Papermaking retained its classification as an energy-intensive industry, allowing most mills to continue benefiting from relief under the British Energy Supercharger and the Carbon Price Floor Compensation Scheme.

According to CPI figures, energy support secured for the UK paper industry amounted to around £149m in 2025.



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