

Sonoco explains background to end of beverage carton recycling at Stainland

27 August 2026 [Frauke Schmidt](#) Published in issue 38/2026

Sonoco has explained to EUWID the background to the end of beverage carton processing at its Stainland site in the UK. The Alliance for Beverage Cartons and the Environment (ACE UK) announced in August that Sonoco was no longer processing liquid beverage cartons at Stainland.



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According to the association, the UK therefore currently has no domestic recycling capacity for this material. Beverage cartons are now being sent for recycling to paper mills in Germany, France and Spain.

Speaking to EUWID, Sonoco said that exiting beverage carton recycling does not represent a change in strategy or a withdrawal from the recycling business, but rather the end of a project that was originally set up for a ten-year period and was subsequently extended.

Sonoco stressed that the site's other recycling activities and the production of recycled board are continuing unchanged. The Stainland mill has been active in paper production for more than 100 years and, according to the company, was Sonoco's first location in Europe. The mill currently produces around 55,000 tpy of coreboard based on 100 per cent recovered paper, mainly for the UK market. Sonoco also operates its own recovered paper collection activities at Stainland. Its recovered paper recycling capacity stands at around 90,000 tpy.

Alongside these core activities, Sonoco operated a separate project for the processing of beverage cartons at Stainland. According to the company, the project was initially designed to run for ten years and was subsequently extended by another two years. Sonoco supported the project both financially and logistically throughout its duration. Following the end of the project in mid-2026, the company discontinued the processing of beverage cartons.

However, the issue does not appear to be completely closed for Sonoco. Adam Wood, Vice President and General Manager, Paper and Industrial Converting International at Sonoco, is currently in direct contact with ACE UK. According to Sonoco, the talks are intended to explore whether and in what form the company could continue to support beverage carton recycling in the UK. Existing equipment is among the options being discussed. Sonoco said it plans to issue a further statement following these talks.

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German recovered paper exports fall to 20-year low

EUWID + 07 September 2026 Christoph Schmidt | Published in issue 38/2026



Germany's recovered paper exports fell 14 per cent to 678,000 tonnes in the first half of 2026. This is the lowest level in more than 20 years.

German recovered paper exports have continued to decline. Shipments had already fallen to a historic low in 2025, and volumes have dropped further this year. According to provisional figures from the Federal Statistical Office, Destatis, Germany exported 678,000 tonnes of "paper or board for recovery" in the first six months of the year, down 14 per cent year on year. This was the lowest first-half volume recorded since Destatis began tracking the data in 2006.

Exports to the Netherlands saw a particularly sharp decline, falling by almost a quarter from 199,000 to 154,000 tonnes. However, a significant proportion of the recovered paper shipped to the Netherlands is typically re-exported to other countries. These onward shipments are not reflected in the Destatis figures.

Exports to Austria and Switzerland also fell substantially. Austria imported a total of 155,000 tonnes of recovered paper from Germany between January and June, 14 per cent less than a year earlier. Shipments to Switzerland fell by 35 per cent to 35,000 tonnes.

Belgium and France bucked the overall trend, importing 15 and 13 per cent more recovered paper from Germany than in the prior-year period. With shipments of 198,000 tonnes, France became the largest export market for German recovered paper.

The total value of German recovered paper exports came to €96m in the first half of 2026, compared with €127m for 789,000 tonnes in the same period last year. This put the average price per tonne at €142, down from €161 a year earlier. The lower average price is in line with the decline in prices seen in EUWID's monthly market surveys, particularly in the second half of 2025.

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Recovered paper imports also edged lower in the first half of the year, falling by 1 per cent to 2.55 million tonnes with a total value of €356m. Germany thus remained a net importer of recovered paper. The gap between imports and exports was the second widest since Destatis began tracking the data, exceeded only in 2022.

Poland was Germany's most important supplier of imported recovered paper in the first half of the year. Imports from Poland rose by 7 per cent year on year to 577,000 tonnes. Deliveries from the Czech Republic increased even more sharply, climbing by a quarter to 267,000 tonnes. By contrast, imports from the Netherlands fell by 136,000 tonnes, or 22 per cent, to 486,000 tonnes.

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Germany: Imports and Exports of Recovered Paper

in tonnes

EXPORTS			
January - June			
	2026	2025	Change in %
France	198,288	174,706	13
Austria	155,080	180,258	-14
Netherlands	154,116	199,092	-23
Belgium	54,384	47,269	15
Switzerland	34,932	53,730	-35
India	21,877	14,590	50
Turkey	13,630	32,783	-58
Italy	10,362	12,321	-16
Mexico	8,164	4,727	73
Poland	6,757	10,332	-35
Rest of the world	20,076	59,011	-66
Total	677,666	788,819	-14
thereof EU-27	589,657	646,824	-9

IMPORTS			
January - June			
	2026	2025	Change in %
Poland	577,071	541,092	7
Netherlands	485,872	621,433	-22
Czech Republic	267,073	214,955	24
France	256,370	262,589	-2
Denmark	215,560	221,023	-2
Belgium	163,489	138,852	18
Austria	141,439	113,267	25
Switzerland	128,536	114,282	12
United Kingdom	62,051	81,381	-24
Sweden	59,200	73,617	-20
Rest of the world	194,662	189,500	3
Total	2,551,324	2,571,991	-1
thereof EU-27	2,291,567	2,314,530	-1

Source: Destatis; calculations by EUWID

EUWID assumes no liability for the accuracy of the information.

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Schleipen Paper shuts down Bad Dürkheim site

EUWID + 08 September 2026 [Noureddine Guimouza](#) | Published in issue 38/2026

Insolvent German paper company Schleipen Paper has permanently ceased operations at its Bad Dürkheim mill in western Germany.

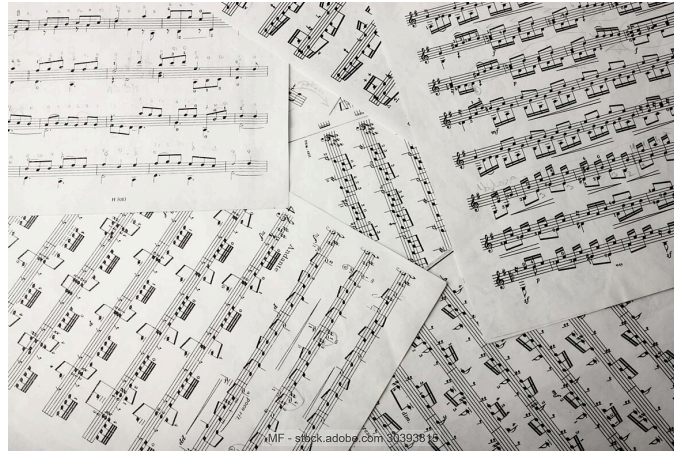
Production ended on 26 August, the insolvency administrator's law firm confirmed to EUWID.

Schleipen, a subsidiary of Lenk Paper GmbH, filed for preliminary insolvency proceedings in July. André Berbuer of BSK Berbuer Speier Kuhn, who had initially been appointed preliminary insolvency administrator, is now handling the proceedings as insolvency administrator.

Efforts to secure a long-term solution for the company were unsuccessful, the insolvency administrator told EUWID. Schleipen Paper most recently employed 73 people.

The Bad Dürkheim mill has a history spanning almost 300 years. It mainly produced graphic papers for book and publishing applications, including book printing, endpaper and music papers as well as the Kamiko and Fly grades.

Lenk Paper acquired the site in 2021 in an asset deal following the insolvency of Cordier Spezialpapiere. Operations were initially continued with around 86 employees.



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Drewsen to increase prices for all paper grades from October

08 September 2026 [Published in issue 38/2026](#)

Drewsen Spezialpapiere has announced plans to increase prices by 8 per cent from October.

The increase will apply to all product segments and will take effect for deliveries from 1 October 2026, Drewsen said in a statement.

The speciality paper producer cited persistently elevated costs for raw materials, auxiliary materials and energy as the reason for the move.



Drewsen Spezialpapiere produces security and technical papers as well as printing and packaging papers. The company puts its production capacity at around 170,000 tpy.

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UPM and Sappi nominate management for planned joint venture

08 September 2026 [Published in issue 38/2026](#)

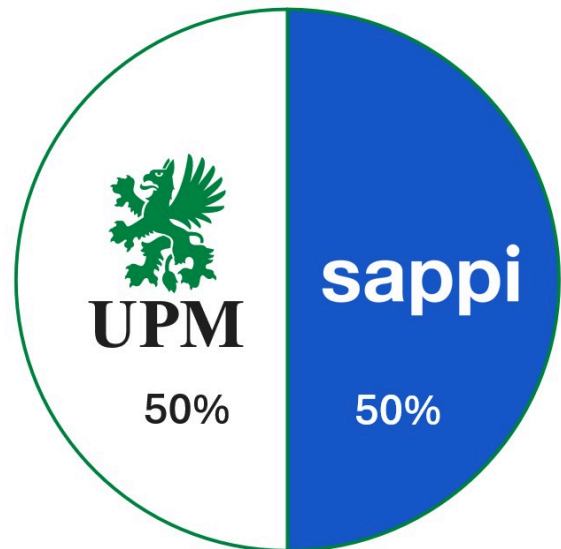
UPM and Sappi have nominated the future management of their planned joint venture for graphic papers. Gunnar Eberhardt is to become Chief Executive Officer, while Stephen Blyth has been nominated as Chief Financial Officer.

Mr Eberhardt has headed UPM Communication Papers as Executive Vice President since October 2024. Mr Blyth is currently Chief Financial Officer of Sappi Europe.

The appointments are conditional on receipt of all necessary regulatory approvals and completion of the transaction.

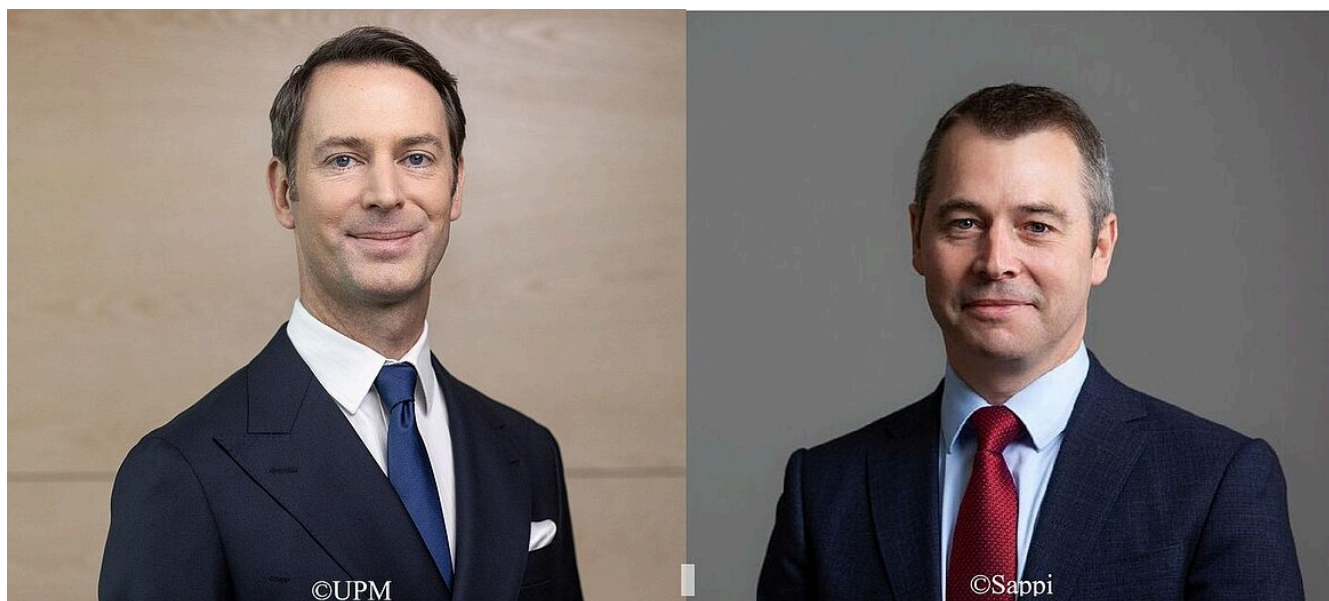
UPM and Sappi signed binding agreements for the planned 50/50 joint venture at the end of May. The new company is to combine UPM Communication Papers with Sappi's European graphic paper business.

The transaction is currently undergoing an in-depth Phase II review by the European Commission. At the end of August, the Commission issued a Statement of Objections setting out its preliminary competition concerns. UPM and Sappi continue to expect the regulatory process to be completed by the end of 2026.



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Tullau Pappen files for insolvency, operations to continue at both mills

 11 September 2026 Konstantin Stoll | Published in issue 38/2026

German board producer Tullau Pappen Karl Kurz has filed an application for the opening of insolvency proceedings.

The competent commercial court subsequently ordered provisional insolvency proceedings on 3 September 2026 and appointed Dr. jur. Tibor Braun of IBK Illig Braun Kirschnek Rechtsanwälte PartGmbH as provisional insolvency administrator. Mr Braun also holds this role for the company's Trauchgau board factory in Halblech, for which provisional proceedings have likewise been ordered.



In a statement to EUWID, the lawyer explains that business operations at both sites are being "continued in full".

"For both sites, a basic agreement has already been reached with key suppliers, energy providers, haulage companies and financiers regarding the orderly continuation of operations," Mr Braun said. The aim now is to find investors as part of an M&A process in order to secure operations at the company's two mills in the long term.

Around 45 employees at each of the two sites are being affected. The insolvency allowance from the Federal Employment Agency will cover wages and salaries up to and including October 2026.

Cost increases and a difficult market conditions are having a negative impact

Mr Braun cites, in particular, the significant rise in energy, raw material and labour costs in recent years, combined with an increasingly difficult market environment, as as main reasons of the insolvency. With production volumes remaining largely stable across the market as a whole, prices and margins have come under continuous pressure, according to the statement issued to EUWID.

At the same time, substantial cost increases could only be passed on to customers to a limited extent, as price rises led directly to losses in volume and sales revenues.

Tullau Pappen produces wrapping board and greyboard at two sites, with a total output capacity of around 40,000 tpy. According to the company, it is one of the leading suppliers of wrapping board in Germany. At the Rosengarten-Tullau site, the company manufactures wrapping board on a single machine. Pappenfabrik Trauchgau GmbH & Co. KG operates a Fourdrinier machine in Halblech.

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Parenco is granted permit for expansion and conversion

🔗 **EUWID +** 11 September 2026 [Bernd Hecht](#) | Published in issue 38/2026

Smurfit Westrock's Parenco mill in the Netherlands has been granted an environmental permit to expand production and potentially switch to recycled corrugated case material.

At the end of August, the province of Gelderland approved the expansion of the paper mill and the switch to the packaging paper production as part of the regular operating licence procedure. The approval allows Parenco to increase production capacity to almost 1 million tpy.



The approval does not mean the company has yet made a decision on whether, and if so when, a conversion will take place. Any such decision will depend on the company's future development as well as on the market conditions for containerboard and publication paper.

Smurfit Westrock Parenco currently produces SC-B paper and improved newsprint on one paper machine, which has a production capacity of around 265,000 tpy. A second machine, with a capacity of about 385,000 tpy, produces brown testliner and recycled fluting.

The company has been considering converting the SC paper machine to produce corrugated case material since Smurfit Kappa acquired the Parenco plant in 2018. Plans for a potential conversion were shelved in 2019, but the company has since kept the option open.

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RDM to increase prices for entire WLC product range

11 September 2026Published in issue 38/2026

RDM Group has announced a price increase of €80/t across its entire WLC cartonboard portfolio from October 2026.

The decision reflects the continued inflationary environment and the sustained increase in manufacturing costs experienced across numerous cost categories throughout the paper and board industry. Despite ongoing efforts to mitigate these pressures through operational efficiency and cost management measures, the current level of cost inflation can no longer be fully absorbed without affecting market pricing.



RDM operates eight mills in Europe, among them the Fiskeby facility

"Over an extended period, the industry has faced increasing cost pressures across a number of manufacturing inputs," said Pierre-Yves Corbière, Chief Commercial Officer at RDM Group.

"While RDM Group has worked diligently to offset these impacts wherever possible, the magnitude and duration of the increases make a price adjustment necessary to ensure the sustainable supply of high-quality cartonboard solutions to our customers."

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Sappi Europe to hike WFC paper prices

14 September 2026 [Published in issue 38/2026](#)

Sappi Europe aims to hike prices for the entire range of its woodfree coated papers in Europe. The company has announced a price hike of 5 to 7 per cent for all new orders and deliveries as of 12 October.

Sappi Europe produces woodfree coated paper at three paper mills in Austria, Germany and the

Netherlands with a total annual capacity of 1.1. million t. The adjustment is necessary to offset continued cost increases across the supply chain, which are putting significant pressure on paper production economics despite ongoing efficiency and cost-control measures, according to the company.

Sappi Europe is a division of Sappi Limited. It operates seven mills sites in five countries with a total production capacity of 2.6 million tpy of pulp, graphic papers and packaging and specialty papers.



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Sylvamo's European operations remain in the red

🔗 **EUWID +** 16 September 2026 | [Published in issue 38/2026](#)

US pulp and fine paper manufacturer Sylvamo reported somewhat improved business conditions in part of its regions, overall financial results for the second quarter and the first six months however declined compared to the previous year. Sylvamo's European business posted an adjusted Ebitda loss of \$12m in Q2 2026, narrowing from a \$30m loss a year earlier.

Sylvamo reports improving pulp prices in the first half of the year. The company says it is realising previously communicated price increases and is expecting to implement further increases in the third quarter for European customers.

In Latin America, the paper manufacturer expects demand to increase over the rest of the year. The company has been able to implement price increases for its Brazilian customers. Higher export prices are currently being put in place.

The North American market was marked by a significant decline in supply of uncoated fine paper in April. The closure of International Paper's Riverdale mill accounted for roughly 7 per cent of the industry's annual supply. At the same time, imports increased in the second quarter. Sylvamo is currently implementing higher paper prices for its North American customers.

The company is pushing ahead with the modernisation of the Eastover paper mill in South Carolina to increase production capacity, reduce costs and improve efficiency. Output capacity for uncoated woodfree paper will rise by 60,000 tpy by optimising the mill's PM 2. The work will be carried out during a scheduled break in the fourth quarter of 2026. In July, a new cut-size sheeting line was delivered which is to be installed in the third quarter of 2026 and commissioned in Q4.

Modernisation of the woodyard has already been partially implemented, the hardwood fibre line has been in operation since May and ensures higher reliability and better quality of wood chips, Sylvamo says. The softwood fibre line is scheduled to be commissioned in the first quarter of 2027.

Sylvamo expects a much better earnings performance for the last six months of the year as price and mix, volume and operations should be better compared to the first half.

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Sylvamo results				
million \$	April - June		January - June	
	2026	2025	2026	2025
Key figures				
Sales	806	794	1,561	1,615
Adjusted EBITDA	60	82	89	172
Operating result	14	30	-1	74
Net result	-11	15	-14	42
Business area review				
Europe				
Sales	197	181	387	371
Adjusted EBITDA	-12	-30	-48	-645
Operating result	-20	-38	-64	-62
Latin America				
Sales	219	207	406	406
Adjusted EBITDA	9	27	35	73
Operating result	-16	2	-12	28
North America				
Sales	411	419	801	857
Adjusted EBITDA	63	85	102	144
Operating result	50	66	75	108
Source: Sylvamo				

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Higher costs and lower prices weigh on Sappi's results

📄 **EUWID +** 16 September 2026 | Published in issue 38/2026

Against the backdrop of a challenging macroeconomic environment, Sappi posted consistently lower results in the third quarter of its financial year and also in the first nine months compared with the previous year. With quarterly revenue of \$1.33bn (2025: \$1.32bn), the company reported adjusted Ebitda of \$53m (\$80m), an operating loss of \$203m (\$7m) and a net loss of \$181m (\$33m).

Results were impacted by low selling prices across many product categories, cost inflation resulting from the conflict in the Middle East, and the impact of scheduled maintenance shutdowns amounting to \$22m at the Ngodwana mill in South Africa. The exchange rate of the South African rand against the US dollar further eroded the profitability of the South African business. On a positive note, Sappi reported improved results in the North America region thanks to higher paperboard sales volumes from PM 2 at the Somerset mill and increased efficiency.

The fair value adjustment for the Forestry division for the quarter amounted to a loss of \$152m, largely attributable to unfavourable currency fluctuations affecting hardwood prices, as well as the negative impact of rising fuel costs.

In the Graphic Papers division, Sappi continued to face a challenging market environment characterised by a structural decline in demand and persistent overcapacity. Sales volumes for the quarter were 6 per cent below the previous year's figures; nevertheless, profitability was only slightly below the previous year's level, supported by strategic reductions in fixed costs in Europe and stable pricing in North America. According to Sappi, capacity reductions following the refurbishment of PM 2 at the Somerset mill contributed to a more balanced market there. In addition, there were industry-wide price increases, which were implemented during the quarter in response to rising input costs.

The Packaging and Speciality Papers division recorded significant revenue growth of 14 per cent compared with the previous year, driven by rising demand for board in North America and the continued expansion of production at the PM 2 line at the Somerset mill. However, the division's profitability deteriorated compared with the previous year due to higher operating costs, which included the impact of the scheduled maintenance shutdown at the Ngodwana mill. In Europe, sales volumes were slightly above the previous year's level, driven by growth in sales of label paper. Despite the successful implementation of price increases to cover higher input costs, selling prices and margins in the European region remain under pressure.

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The Pulp division operated in a slightly more favourable market environment during the quarter, reports Sappi. Demand for dissolving wood pulp (DWP) remained robust despite the seasonally weaker period, supported by solid capacity utilisation rates in the viscose staple fibre (VSF) industry and favourable demand for cellulose fibres, as higher petrochemical costs linked to the conflict in the Middle East continued to exert pressure on competing polyester textile fibres. High capacity utilisation rates in the VSF industry, a solid order book and low stock levels throughout the entire value chain underpinned the positive price trend for DWP, which had already become apparent in the previous quarter.

Sappi results				
million \$	April - June		Nine months ended June	
	2026	2025	2026	2025
Key figures				
Sales	1,334	1,321	3,955	4,031
Adjusted EBITDA	53	80	195	390
Operating result	-203	-7	-643	116
Net result	-181	-33	-631	17
Business area review				
Europe				
Sales	541	571	1,649	1,673
Operating result	-18	-23	-173	-13
North America				
Sales	454	404	1,269	1,302
Operating result	-8	-21	-181	29
South Africa				
Sales Pulp and Paper	320	329	983	1,003
Sales Forestry	19	17	54	53
Operating result	-179	32	-277	105
Business review by product				
Deliveries (in 1,000 t)				
Pulp	339	344	1,064	1,044
Packaging and specialty papers	414	362	1,146	1,042
Graphic papers	460	490	1,455	1,556
Forestry	351	253	1,023	851
Source: Sappi				

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Progroup invests €40m in steam supply at Burg mill

 **EUWID +** 16 September 2026 | Published in issue 38/2026

Progroup is investing around €40m in a new boiler house at its Burg paper mill in Germany to secure the long-term steam supply for PM 1.

Construction is scheduled to start in spring 2027, a company spokesperson told EUWID. The new boiler, which will have a capacity of 150 t/h, is due to be commissioned in 2028.

The investment at the Burg site is intended to safeguard the steam supply for PM 1, which produces recycled corrugated case material. The machine has a working width of 6 m and produces grades with basis weights of 110-170 g/m². Progroup puts the mill's production capacity at around 415,000 tpy.

The company announced the project as part of celebrations marking the 25th anniversary of PM 1. Burg was Progroup's first paper production site, with the company entering corrugated case material production there in 2001. It later added PM 2 in Eisenhüttenstadt and PM 3 in Sandersdorf-Brehna.

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New Valmet CFO starts in November

 **EUWID +** 16 September 2026 | [Published in issue 38/2026](#)

Valmet's new chief financial officer (CFO) **Pia Aaltonen-Forsell** will start in her new position as of 1 November 2026. Valmet's current CFO Katri Hokkanen will leave the company at the end of September as previously announced, and Niklas Nylund, Vice President, Group Finance, will serve as interim CFO during October, the company explained.

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MM Board & Paper announces price increase for its entire cartonboard range

📄 **EUWID +** 16 September 2026 | [Published in issue 38/2026](#)

Mayr-Melnhof Board & Paper intends to increase prices across its entire cartonboard range by €75/t from October. According to the announcement, price increases apply to both GD and liner board as well as primary fibre grades. The company explained that the decision was a response to the ongoing rise in costs and persistent pressure on margins. MM says the costs of energy, logistics and chemicals in particular remain significantly above historical levels and have been highly volatile since March this year.

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Nippon Dynawave tank had been deemed unfit for service before Longview accident

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Nippon Dynawave Packaging had been warned of serious defects in the white liquor tank at its Longview pulp and liquid packaging board mill in the US state of Washington around ten months before the fatal accident. Eleven employees were killed in the incident in May.

According to an investigation update released by the US Chemical Safety and Hazard Investigation Board (CSB) at the end of August, an external inspection in July 2025 found significant thinning of the steel wall of the tank, which had a capacity of around 4.5 million litres. Parts of the tank shell were below the calculated minimum safe thickness. The inspection contractor recommended an internal inspection and repairs and classified the tank as “not fit for continued service” unless corrective action was taken. Further external inspections in October 2025 and February 2026 confirmed that the wall thickness remained below the required minimum. According to the CSB, the tank was nevertheless neither internally inspected nor repaired, taken out of service or operated under reduced conditions before the accident.

The CSB investigation is still ongoing. The agency is continuing to examine the causes and contributing factors, including Nippon Dynawave’s mechanical integrity, inspection and maintenance practices, the handling of other atmospheric storage tanks, operating conditions prior to the failure and emergency response procedures.

Tank was around 90 per cent full

On 26 May 2026, a process upset in the pulp mill’s digester area led to the flow of white liquor from the tank to the digester being stopped. White liquor nevertheless continued to enter the tank from the recausticising plant, causing the fill level to rise to around 90 per cent by 6.22 a.m., according to the CSB report.

At around 7.09 a.m., the tank suddenly collapsed, releasing approximately 3.4 million litres of white liquor. The highly alkaline and corrosive liquid, which had a temperature of around 93°C, flooded the surrounding courtyard and nearby buildings, killing eleven employees and seriously injuring three others.

Most normal operations at the Longview site have remained suspended since the accident. Nippon Dynawave has not announced a date for a full restart of production.

NDP acquired the mill from Weyerhaeuser in 2016. It produces pulp, part of which is used internally to manufacture liquid packaging board, while the remainder is sold on the open market.

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DS Smith completes plant closure in Mannheim

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DS Smith closed its corrugated packaging plant in Mannheim. The site ceased operations at the end of August 2026, a spokeswoman for DS Smith confirmed to EUWID.

The closure of the Mannheim site followed an agreement between the company and employee representatives on a social plan. At the end of July, DS Smith and German trade union Verdi confirmed that negotiations for planned plant closures in Germany had been concluded.

For the remaining sites that DS Smith will shutter in Germany as part of the announced restructuring plan, the company continues to cite the end of 2026 as the timeframe. The company spokeswoman did not provide any further details on when the other plants are expected to close.

In addition to Mannheim, DS Smith's closure plans include speciality paper and converting sites in Endingen, Donauwörth and Paderborn as well as the display, retail and offset (DRO) plant in Hövelhof. DS Smith additionally planned to partially shut down the DRO plant in Hamburg, a spokeswoman told EUWID last autumn.

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Eruslu drives transformation into a tissue paper producer

📄 **EUWID +** 16 September 2026 | [Published in issue 38/2026](#)

Turkish tissue products manufacturer Eruslu Hygienic Products is expanding its operations to include in-house tissue paper production. Two new Valmet tissue paper machines with a combined annual capacity of 140,000 tpy are being installed at the company's Bursa site. The first machine is scheduled to come on stream in 2027, the second in 2028.

According to Valmet, each of the two tissue machines is designed for a production speed of up to 2,200 m/min. The project follows on from an investment in Bursa that was announced earlier this spring. Eruslu had ordered six new tissue converting lines from Futura and its subsidiary Plusline.

By establishing its own tissue paper production, Eruslu aims to expand its value chain and serve both the consumer and away-from-home markets. The company employs around 4,800 people and manufactures, amongst other things, baby and adult care products, wet wipes and household products. The company says it distributes its products in more than 150 countries.

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Northern Pulp mill to be demolished

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Northern Pulp's mill in Pictou County in Canada's Nova Scotia province, which has been idle since 2020, will be demolished. The provincial government issued an order to the effect on 27 August. Work on decommissioning, pollutant remediation and demolition of the buildings and facilities could begin as early as September, according to the government.

The Northern Pulp 280,000 tpy NBSK mill was shut down in February 2020 after the provincial government banned the company from disposing of industrial wastewater in the Boat Harbour lagoon after many decades. Parent company Domtar had considered building a new, modern pulp mill at a new site in Liverpool, Nova Scotia, but abandoned the plans last year for commercial reasons. Liquidation of the assets and the final closure of the defunct Northern Pulp mill site was therefore initiated.

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Cepac plans to close its Darlington site

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The British packaging manufacturer Cepac has announced plans to close its site in Darlington. On 9 September, the company began a 30-day consultation period with employee representatives regarding staff redundancies, before any final decisions are taken. Up to 63 jobs would be affected by the measure.

The site produces small corrugated trays, which are marketed under the Flutepac brand. Due to significant financial losses, the company has proposed ceasing all production at Darlington.

Managing Director Steve Moss explained that the announcement was regrettable, but that despite significant investment in new equipment, the market for Flutepac paper-based microflute corrugated trays had developed much more slowly than expected. Should the closure plans go ahead, the company will do everything in its power to support those affected in finding alternative employment at other Cepac sites or elsewhere in the region.

The company developed the Flutepac product range in 2019 and launched it on the market in 2020.

Cepac manufactures corrugated packaging at its sites in Rotherham, Darlington, Rawcliffe and Doncaster for the food and drink industry, as well as for the consumer goods, industrial packaging, e-commerce, logistics and transport sectors.

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Act of sabotage temporarily stops Papeteries du Léman

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French specialist and packaging paper manufacturer Papeteries du Léman has been forced to temporarily halt production following an act of sabotage targeting nearby energy infrastructure. As reported by numerous local and national media outlets in France, three of the four pillars of a high-voltage pylon near the paper mill were sawn through on Monday, 7 September, causing such severe damage to the pylon that the power supply to the mill was cut off and paper production was halted.

By Wednesday 9 September, safety and repair work had been carried out by the grid operator RTE, and currency supply for the mill was restored. According to the French press, the paper machine gradually resumed operation on Wednesday.

Papeteries du Léman had told the press that the impact of the act of sabotage was “massive”. After more than 48 hours, losses amounting to around half a million euros had been incurred due to the production stoppage alone. The total damage is expected to be higher.

At its plant in Publier, near Thonon-les-Bains on the French side of Lake Geneva, Papeteries du Léman manufactures, amongst other grades, baking paper, thin printing paper, flexible packaging paper and tissue paper on four machines. The plant has an output capacity of 85,000 tpy and employs around 360 staff.

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EUDR: German paper and packaging industry considers further postponement unlikely

Federal government sets out the legal framework for national implementation

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The paper and packaging industry continues to prepare for the forthcoming implementation of the EU Deforestation Regulation (EUDR). After its implementation was postponed twice in recent years, each time by one year, the deadline of 30 December 2026 remains unchanged at this stage. The German government is also preparing the legal framework in Germany with the Act on the National Implementation of the EUDR. This is also due to come into force on 30 December. EUWID respondents in the paper and packaging industry see this as a sign that a further postponement of the regulation is considered unlikely. In its draft of the Act on the Implementation of the EU Regulation on Deforestation-Free Products, Germany's governing coalition reaffirmed that it would not introduce any additional national regulations that go beyond EU requirements.

Fibre-based packaging remains subject to the EUDR

The draft legislation does not, as a result, alter any of the provisions of the EUDR – such as those relating to fibre-based packaging. This would require changes at EU level. In May, the European Commission reaffirmed that there would be no fundamental changes to the requirements for fibre-based packaging. The Commission clarified at the time that packaging made of paper and paperboard would continue to fall under the EUDR if it were placed on the market or exported as a product in its own right. This applies, for example, to cartons or other packaging solutions made of paper and paperboard (HS Code 4819), provided they were sold as goods. If, however, packaging was used solely to protect, carry or transport another product, it did not qualify as a relevant product under the Regulation.

Federal Cabinet passes national legislation in mid-August

Against this backdrop, industry associations also commented in the summer on the earlier draft of the national implementing legislation, which, at the time of the consultation, was still titled the “EntwaldungsMG” (Deforestation Act) as a ministerial draft. On 12 August, the Federal Cabinet finally agreed on the current version, which was due to be submitted to Parliament. As the EUDR, being a regulation, applies equally in all EU Member States, the legal scope for more far-reaching provisions is limited, according to industry association sources speaking to EUWID.

The draft still provides for the provisions of the EU regulation to be implemented one-to-one. A spokeswoman for the Federal Ministry of Agriculture, Food and Regional Identity (BMLEH) confirmed to EUWID that the coalition of the

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CDU/CSU and the SPD therefore was not planning to impose any obligations in Germany that went beyond the requirements of the European Commission. The focus was also on the administrative burden. The coalition concluded in the bill: "This bill will result in only a very limited [...] compliance burden for the business sector."

Draft sets out responsibilities and options for sanctions

This Act on the Implementation of the EU Regulation on Deforestation-Free Products focuses, amongst other things, on national responsibilities for monitoring compliance with the Deforestation Regulation. In this regard, the German government has officially designated the Federal Office for Agriculture and Food, which is already responsible for implementing the EU Timber Regulation (EUTR) in Germany. At the same time, however, the BLE may also delegate the relevant powers for monitoring tasks to third parties. Criticism of this was voiced, amongst others, by the German Engineering Federation (VDMA), which argued that it remained unclear exactly what this delegation of powers entailed. "From the VDMA's perspective, it must be clearly ruled out that private third parties may independently exercise investigative or enforcement powers against companies." Overall, the German federal government expects up to around 2,300 inspections per year along the supply chains covered by the EUDR.

Above all, however, the law sets out the scope for sanctions. For instance, it stipulates that authorities may seize products that contravene the EUDR. Under certain conditions, bans of up to one year are also possible, during which a market participant is no longer permitted to offer goods on the EU market. Prison sentences of up to five years for breaches of Article 3 of the EUDR are also conceivable.

For example, in response to an enquiry, the German paper industry association "Die Papierindustrie" stated that the structure of the potential sanctions should be viewed critically. A temporary ban of up to one year on placing relevant raw materials or products on the market could, in individual cases, threaten the very existence of companies in the timber and paper industry, emphasized the association in a statement. For this reason, sanctions had to always be proportionate to the severity of the infringement, the corporate structure and the actual scope of influence of the market participant in question. A ban on placing goods on the market not only jeopardized an individual company, but also jobs, regional value creation and downstream supply chains. In principle, "Die Papierindustrie" advocates that national regulations, too, should be designed to be practicable and proportionate.

No exceptions, like for printed products, are foreseeable for paper packaging

Exemptions that exclude certain end products from the scope of the EUDR continue to apply to print products – but not to fibre-based packaging.

Research carried out by EUWID at the start of the year showed that the packaging industry was reluctant to campaign for such exemptions. At the same time, the European paper industry remained firm in its position that it wishes to see

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the unilateral special provision – for example, for printed matter such as books and magazines – reversed.

As part of the consultation on the European Commission's simplification measures in the first half of 2026, industry associations reiterated their criticism. In a submission via the EU's "Have your say" portal, the paper industry referred to the measures as a "gateway for unsecured supply chains". The German paper industry had previously campaigned for print products to be re-included within the scope of the EUDR and, in early June, criticized the EC for failing to do so as part of the so-called Simplification Review. Cepi put forward a similar argument.

At the same time, the association stated: "From the paper industry's perspective, this is a missed opportunity: a regulatory asymmetry is emerging because paper as a raw material and numerous paper-based products remain covered under other classifications (e. g. packaging under HS 48), whilst printed products are excluded."

There was no further mention in the EUWID research in August 2026 of any further initiatives in favour of packaging and labels, such as those called for by the German printing association BVDM at the start of the year.

The Corrugated Board Industry Association (VDW) also commented on the bureaucratic obligations. Whilst the association welcomed the simplifications, companies were still required to record reference numbers and retain them for five years. Depending on their role in the supply chain, this may – or would – also affect companies in the corrugated board industry, which, amidst a continuing tense overall economic situation, were already feeling the strain of the generally increasing number of regulatory requirements, due diligence obligations and reporting duties. Putting the EUDR into practice remained a challenging task.

With regard to the provisions on sanctions, printing industry association BVDM expressed concern that potential penalties could also affect the downstream supply chain. In a statement, the association concluded that "that the draft implementing legislation does not sufficiently and consistently implement the intended relief for the downstream supply chain. Printing companies that purchase paper and board within the EU and use them to manufacture printed products covered by the EUDR continue to face considerable legal and economic risks."

The EUDR must not result in companies at the end of the supply chain being held liable for something they can neither control nor trace, according to the statement by Kirsten Hommelhoff, Chief Executive of the BVDM. "The Federal Government must ensure that the relief for downstream companies intended at EU level is not undermined by disproportionate national sanctions and enforcement regulations." The BVDM, which had previously also advocated for exemptions regarding packaging and labelling, called at the end of July for a "careful review" of the draft bill. Whilst the relief from due diligence obligations for the downstream supply chain was to be welcomed, the BVDM sees a risk that the penalties and sanctions set out in the draft could undermine the benefits of this relief.

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PPWR: Commission holds firm on transport packaging interpretation

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The European Commission is standing by its interpretation of the PPWR's definition of "manufacturer" for unbranded transport packaging, despite a differing position being taken by the European Network of National Registers (EUNR). Under the Commission's interpretation, the company that physically makes the packaging should generally be considered the "manufacturer", rather than the company that uses it. The Commission argues that this approach would make enforcement much simpler and avoid disproportionate compliance costs. The position is set out in correspondence between Germany's Federal Environment Ministry (BMUKN) and the Commission, which has been seen by EUWID.

The BMUKN had asked the Commission in early August to revise its latest PPWR FAQ document on this point, noting that the EUNR, which represents nationally competent packaging registers and authorities from 16 EU member states, had taken a different position.

According to the ministry, the EUNR's position is that the "producer" of transport packaging should be the first operator in the domestic supply chain. The difference in interpretation is particularly important for transport packaging that only takes its final form when it is filled. According to the EUNR, the domestic supply chain for such packaging begins when it is filled. The BMUKN says this typically applies to films. Under the EUNR's interpretation, the filler or user would therefore also be considered the "manufacturer" of the packaging.

The BMUKN told the Commission that it found its apparent decision to take a different position particularly regrettable, not least because this had only become apparent a few days before the PPWR took effect. The ministry therefore asked the Commission to revise its FAQ document.

Commission sees suppliers as best placed to meet obligations

The Commission rejected the request to revise its interpretation and maintained that, for unbranded transport packaging, the "manufacturer" is generally the company that physically makes the packaging rather than the company that later uses it.

The Commission draws a clear distinction between the terms "manufacturer" and "producer" as used in the PPWR. The "manufacturer" is responsible in particular for ensuring that packaging complies with the Regulation's requirements. The "producer", by contrast, is the economic operator responsible for extended producer responsibility (EPR) obligations in the relevant member state. This means that the roles may fall to different companies.

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The Commission bases its interpretation in part on the obligations associated with the role of “manufacturer”, including ensuring compliance with PPWR requirements, issuing the EU declaration of conformity (DOC) and meeting traceability obligations. It argues that the packaging supplier is best placed to fulfil them.

The Commission also argues that its interpretation would make EPR systems easier to establish. Under what it describes as a “bottleneck approach”, obligations could be concentrated at supplier level rather than spread across hundreds of thousands of transport packaging users. This would also make it easier to prevent free riding and double payments, according to the Commission.

Commission rejects distinction between rigid and flexible packaging

The Commission does not distinguish between rigid and flexible unbranded transport packaging when determining who qualifies as the “manufacturer”. It maintains that the company that physically makes the packaging should be considered the “manufacturer”.

The Commission uses adhesive tape as an example. A company that applies tape to a cardboard box does not, in its view, become the “manufacturer” of the tape. That role remains with the supplier. The situation is different if the company brands the packaging.

The Commission argues that its interpretation would simplify implementation of the PPWR while keeping the resulting compliance burden and costs for industry proportionate. It also told the BMUKN that it believed its interpretation legally defensible against the text of the PPWR, including Article 10 on packaging minimisation. At the same time, it noted that the Commission had clear instructions to reduce administrative burden, notably on small and medium-sized enterprises.

IK rejects Commission's interpretation

Germany's plastic packaging industry association IK (Industrievereinigung Kunststoffverpackungen) disputes the Commission's interpretation. In a letter dated 14 August seen by EUWID, the association argues that stretch film on a roll does not yet constitute packaging under the PPWR. It only becomes packaging once it is wrapped around a specific transport unit, at which point its packaging function and format are determined. The company applying the film should therefore be considered the “manufacturer” of the resulting transport packaging.

The IK argues that the Commission's position is not supported by the PPWR's legal framework. The inclusion of stretch film in Annex II does not, in its view, mean that film on a roll already constitutes packaging under the PPWR, as Annex I is the relevant part of the Regulation for determining what constitutes packaging. The association also rejects the Commission's comparison with cling film and aluminium foil. In IK's view, film on a roll remains a material until it is applied and performs a packaging function.

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The IK also disputes the Commission's argument that its interpretation would make enforcement easier and reduce the administrative burden. The association argues that it could instead result in duplicate conformity assessments, registrations, volume reporting and EPR fees. It also argues that film manufacturers do not have key information about the packaging unit ultimately created using their product and would therefore be unable to meet some of their obligations under the PPWR. The IK has therefore asked the Commission to review its FAQ again, potentially with input from its Legal Service.

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New tariffs put pressure on North American pulp and paper trade

USA extends tariffs to graphic paper / NBSK remains exempt

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This summer has brought a marked escalation in the US-Canada trade dispute for the North American pulp and paper industry. Starting on 22 August, the US has imposed additional 50 per cent tariffs on a range of Canadian forestry products, including many paper and board products and dissolving pulp. Kraft pulp, including Canadian NBSK, is not subject to the additional US tariffs. This development has dashed some European pulp companies' hopes of gaining new sales opportunities in the US because of the dispute. For its part, Canada has imposed retaliatory duties of up to 50 per cent on a variety of US goods on 8 September.

The US measures targeting Canadian imports are based on three proclamations under Section 338 of the Tariff Act of 1930 that were issued on 20 July. According to the Office of the US Trade Representative (USTR), the additional duties cover Canadian imports worth close to \$20bn. The additional tariffs also apply to goods previously eligible for duty-free import into the US under the rules of origin of the North American free trade agreement, USMCA. The tariffs were originally supposed to take effect on 19 August, but Washington suspended the measures for three days a short time beforehand. The additional duties have applied since 22 August.

The USA has since revised the scope of the Section 338 tariffs once again. An amendment to the product lists was announced on 8 September and is set to take effect on 15 September. This change will add 10 tariff lines covering certain uncoated graphic paper grades with a mechanical or chemi-mechanical fibre content of more than 10 per cent by weight to the list subject to the additional 50 per cent tariff. At the same time, two tariff lines will be removed, including HTSUS 4803.00.40, which includes tissue parent reels. Its inclusion in the initial tariff list had particularly sparked industry debate over the potential implications for US tissue supply and production costs.

According to US Customs and Border Protection (CBP), the measures affect, among other products, goods classified under tariff chapters 47 and 48, including pulp, paper and board. Within the pulp sector, the additional tariff will apply to dissolving pulp under HTSUS 4702.00.00, but not to kraft pulp. Canadian NBSK pulp is therefore also exempt, the American Forest & Paper Association (AF&PA) confirmed to EUWID. The association said that Canadian market pulp can continue to enter the USA duty-free.

In 2025, Canadian manufacturers had a total pulp capacity of over 8 million tpy, with NBSK accounting for more than half of this total. The US is a key export market for this grade. Experts estimate that the USA imports approximately 2

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million tpy of NBSK from Canada. Given these trade flows, an additional 50 per cent tariff on Canadian NBSK could have had significant repercussions for the US paper industry. Other key grades made in Canada include northern bleached hardwood kraft and unbleached kraft pulp (UKP).

The range of paper and board grades affected by the US tariffs is considerably broader. It includes kraftliner, certain types of uncoated printing and writing paper, coated graphic paper, coated cartonboard and certain tissue products. Downstream paper products are also affected, including corrugated packaging, paper sacks, envelopes and a range of hygiene and paper articles.

Canada responds by imposing retaliatory tariffs

On 25 August, Canada announced that it would respond to the new US tariffs “dollar for dollar.” Since 8 September, US goods with a total value of CAD27.6bn have been subject to additional tariffs of 15, 25 or 50 per cent. According to the Canadian government, pulp and paper are explicitly among the affected sectors.

In the case of pulp, the retaliatory measure mirrors the scope of the US tariffs, meaning dissolving pulp is subject to the additional 50 per cent duty. However, kraft pulp, and thus conventional paper-grade pulp, does not appear on the Canadian list. NBSK pulp is thus also exempt from the new tariffs on imports into Canada from the USA.

For paper and board, Canada has imposed a 50 per cent tariff on tissue parent reels, certain types of coated graphic paper and board grades, as well as a range of converted paper products. A 25 per cent tariff will apply to certain types of packaging paper, toilet paper, cosmetic tissues and paper towels. Corrugated packaging, paper sacks, envelopes and other paper articles are all subject to the 50 per cent tariff.

Associations warn of supply-chain impacts

The Forest Products Association of Canada (FPAC) has warned that the US measures could have far-reaching consequences for Canadian forestry businesses. FPAC President Derek Nighbor said the sector was among the Canadian industries hardest hit by US action, given the new Section 338 duties, existing tariffs on softwood lumber and other trade measures. In the FPAC’s view, the tariffs are disrupting the deeply integrated North American supply chains and driving up costs on both sides of the border.

The American Forest & Paper Association (AF&PA) takes a more nuanced view of the ramifications for different product areas. The association said that it does not see a material threat to US tissue supply, pointing to the country’s strong manufacturing capacity.

Moreover, Canadian market pulp is not subject to the latest Section 338 tariffs – and tissue is now excluded as well.

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On the other hand, the AF&PA is concerned about the impact of the tariffs on other paper segments, including printing and writing paper. The association urged the US and Canadian governments to resume negotiations and tackle trade barriers in a way that safeguards production, jobs and supply chain certainty on both sides of the border.

No new tariff-related opportunities for European NBSK suppliers

The US tariff regime for European forest products also changed over the summer. New Section 301 measures took effect on 24 July, replacing the earlier Section 122 tariffs. Products from the EU generally face a 10 per cent tariff, although a substantial number of product exemptions apply.

The burden varies markedly within the forestry industry. EU pulp is exempt from the additional US tariffs, while paper and board are subject to a 10 per cent tariff. Softwood sawn timber and wood raw materials also face a 10 per cent tariff, while other wood products under tariff chapter 44 are subject to a 15 per cent rate.

The US-Canada tariff dispute has therefore not created a new tariff advantage over Canadian competitors for European NBSK suppliers. EU pulp is exempt from the additional US tariffs, but Canadian NBSK remains exempt too. As a result, hopes among some EUWID market contacts that Finnish and Swedish suppliers, in particular, could secure better sales opportunities in the US if Canadian pulp faced an additional tariff have not materialised.

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The market for newsprint in Europe will be virtually balanced from the start of 2027

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The market for newsprint in Europe is set to undergo a decisive shift towards a state of near equilibrium between supply and demand following the refurbishment of Palm Paper's PM 7 at its King's Lynn plant in the UK. The paper machine, which has a production capacity of around 400,000 tpy and produces standard and improved newsprint, will continue to operate until the end of this year and will then be converted in the first quarter to produce recycled corrugated case material.

The planned conversion is expected to significantly alter the supply side of the market and ensure that market conditions are largely balanced. In Europe, demand for standard newsprint this year is estimated at around 2.4 million t, with a further demand of around 1 million t for improved newsprint. In the neighbouring market for SC papers, demand this year is expected to be around 1.0 million t. Furthermore, there is a net export from Europe of several hundred thousand tonnes of newsprint per year.

On the supply side, there is currently approximately 3.4 million tpy of newsprint capacity (standard and improved), plus a further estimated 1.9 million tpy for SC papers. Some of these production facilities are capable of producing both newsprint (standard/improved) and SC papers.

Following the cessation of production of newsprint on Palm Paper's PM 7, total European capacity for newsprint will fall to around 3 million tpy. This figure, however, will see a slight increase following UPM's decision to also produce newsprint at its Caledonian Paper LWC mill in Scotland. The company has not commented on the planned production volumes, but market insiders estimate that Caledonian Paper could supply 50,000-60,000 tpy of newsprint annually in future.

The latter would represent part of what PM 7 in King's Lynn has most recently supplied to British customers. According to market insiders, the machine – designed for a capacity of 400,000 tpy – has most recently produced a maximum of 300,000 tpy, some of which was also exported. Palm and Scandinavian manufacturers have recently supplied around three-quarters of UK newsprint demand, with Canadian suppliers accounting for the remaining quarter.

It currently seems unlikely that the latter will substantially increase their deliveries to the UK following the decommissioning of the PM at Palm. At least at current market prices – which are low in the UK and across Europe by global standards – Canadian producers reportedly have little interest in pushing ahead with deliveries to Europe.

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Prices in the US have only just been raised, and in the recent past capacity has been shut down in North America at Thunder Bay and Soucy.

Following the decommissioning of PM 7 at Palm Paper, Norske Skog, with a production capacity of more than 0.8 million tpy, will become the largest manufacturer of newsprint in Europe, followed by Palm and UPM, each with around half a million tonnes per annum; the remainder is shared amongst Stora Enso, Perlen, Hyltepaper, Papresa and Holmen.

Newsprint manufacturers in Europe are currently indicating that they will be making further demands for price increases as early as the fourth quarter, or by the first quarter of 2027 at the latest, once half-year contracts have expired. According to market commentary, price increases of 30-40 €/t are expected to be announced. For paper manufacturers, price increases, combined with improved capacity utilisation and lower unit costs, would have a twofold positive financial impact. With improved capacity utilisation, the chances of securing higher prices increase even as demand for newsprint falls.

There is no doubt that demand for newsprint in Europe will continue to decline this year. According to figures available so far, a decline in consumption in the mid to high single-digit percentage range is to be expected.

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EU reopens anti-dumping investigation into TiO₂

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The European Commission resumed its anti-dumping investigation into titanium dioxide imports from China in late August after receiving an application filed by the European Titanium Dioxide Ad Hoc Coalition (ETDC) on 13 July. The original investigation had formally concluded when definitive anti-dumping duties were imposed on 9 January 2025. The new inquiry will examine whether the definitive duties, which were introduced as fixed, specific duties rather than the form used for the provisional measures, have affected export prices for titanium dioxide made in China, resale prices and, ultimately, sales prices in Europe.

The ETDC alleges that Chinese titanium dioxide producers have absorbed a substantial share of the duties, effectively reducing Chinese titanium dioxide prices following the introduction of the definitive measures. According to the coalition, this price cut cannot be explained by changes in raw material costs, freight rates or product mix. In its preliminary assessment, the Commission concluded that sufficient evidence had been submitted to show absorption. If the allegation is substantiated, dumping margins for Chinese titanium dioxide will have to be recalculated. Under the EU's basic anti-dumping regulation, any revised duties resulting from the investigation may be no more than double the existing duty rates.

The investigation period runs from 1 July 2025 to 30 June 2026, and the Commission may again use sampling in conducting the inquiry. Affected companies had seven days from the publication of the reopening notice in the Official Journal of the European Union on 25 August to identify themselves to the Commission. That deadline passed on 1 September. EU rules state that the entire absorption investigation must be completed within nine months by the end of May 2027, although the Commission has indicated that initial findings could be available as early as the first quarter.

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Decor paper prices to stay the same despite slow demand

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As expected, European decor paper markets have experienced a significant reduction in supply and demand in the summer. Many converters serving the wood-based panel industry, the laminate sector and printed decor, finish foil and treating segments reduced their output starting in mid-July. Some companies that continued operating without formal summer closures took more machines offline than they planned. At the same time, several companies also extended their shutdowns, with some related downtime continuing into September.

Most buyer sectors have yet to show signs of a meaningful improvement any time soon. In certain product areas, such as MDF/HDF and laminate flooring, business tended to deteriorate further over the summer. Against a backdrop of already weakening demand, decor paper producers had scheduled additional downtime in May and June to limit inventory build-up. They then moved into their planned summer shutdown period in mid-July. Buyers and sellers alike noted that most paper machines were offline for one to two weeks, with some machines standing idle for a little longer. Paper machines gradually ramped up operations again in the first half of August to fulfil orders accumulated in the meantime.

Nonetheless, sales and order intake remain sluggish, especially in Central Europe, meaning that storage capacity freed up in July and August might soon be refilled in a worst-case scenario. Some producers plan to introduce fresh output adjustments at individual machines from the beginning of October in the event that stocks start to rise in the weeks ahead.

Manufacturers report that the relief brought by price hikes instituted for decor paper and pre-impregnated paper in July and August was short-lived. Ongoing production cutbacks are pushing up fixed costs on a proportional basis. Energy prices have risen again, while the downward trend in pulp costs recorded in July and August must be weighed against price hikes imposed by titanium dioxide manufacturers, especially in the third quarter. Decor paper manufacturers thus want to stick with current prices. If energy and logistics costs continue to rise, a further revision of energy and freight surcharges could also return to the agenda.

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EC proposes financial support for laid-off Finnish workers

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The European Commission is proposing financial support for a total of 351 workers following dismissals at Finnish paper mills. The six-month reference period runs from 1 October 2025 to 1 April 2026, during which 346 workers were dismissed. The Commission proposes providing up to €1.1m from the European Globalisation Adjustment Fund for Displaced Workers (EGF).

The 346 workers affected during the reference period had previously been employed at paper mills operated by Metsä Group (57), Stora Enso (30), UPM Communication Papers (166) and Sappi (93). According to the Commission, the eligible beneficiaries also include five dismissed workers whose employment ended either before or after the six-month reference period.

In its proposal, the Commission says that Finland's paper industry has been experiencing "severe challenges". The accompanying document outlines the economic developments affecting the industry and points, among other things, to the sharp decline in demand for print products.

Above all, however, the Commission says that the closure of Finland's border with neighbouring Russia in 2023 following Russia's war against Ukraine had a major impact on the Finnish paper industry, especially on the cost structure of paper mills in South Karelia. According to the Commission, the region had been highly dependent on cross-border procurement chains, especially imports of wood from Russia.

Following Russia's war of aggression against Ukraine, wood imports from Russia were subject to sanctions and subsequently ceased. Production costs in the pulp and paper industry then rose sharply, which the Commission attributes to mills having to source the wood required for production from farther afield and at higher prices. US import tariffs added further pressure.

The companies affected responded with temporary layoffs of up to 90 days, but also with major job cuts and staff reductions. The Commission specifically refers to the Imatra mills operated by Stora Enso, UPM's Kaukas mill and Sappi's Kirkniemi mill. In the latter case, Sappi had announced that the closure of PM 2 would reduce production capacity at the LWC and MWC mill by around 175,000 tpy.

The total estimated cost of the support package amounts to €1.8m, of which the Commission would cover 60 per cent, or €1.1m, while the local public employment services in the South Karelia and Lohja-Karkkila employment regions would provide the remaining 40 per cent, or €735,000. Finland has also been supporting the workers since

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January 2026, with these costs eligible for retroactive reimbursement from the EGF. The Finnish government submitted its application for EGF support on 19 May 2026.

The proposal still requires formal approval by both the European Parliament and the Council of the EU.

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Further price hikes for brown and white-top kraftliner emerge in Germany in September

Diverging outlook for the LWC and SC paper segments

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Industry observers paint a mixed picture of the LWC and SC paper segments in Germany. While both segments saw business weaken over the summer, their outlooks for the months ahead could hardly be more different, experts told EUWID. Demand for coated paper continues to trend downward, while suppliers of uncoated magazine grades hope to benefit from changes in the neighbouring newsprint market.

The German kraftliner market continued to see movement in prices at the beginning of September. After paper mills announced further price hikes for brown and white-top kraftliner in August, EUWID's market discussions in September suggest that producers were able to push through a substantial share of the increases. The outcome of negotiations about semi-chemical fluting prices remains unclear.

Paper mills unhappy with their profitability

Sources in the LWC and SC paper market in Germany report a decidedly difficult summer. Paper mills are often under considerable pressure, given low general operating rates across their production machines, the overall contraction in the business and unsatisfactory financial results. Conditions are equally strained in the printing industry, where declining volumes are forcing further adjustment. Industry sources said that liquidity was tight in many parts of the market, suggesting that difficult decisions were likely in the months ahead.

The paper and printing business is not expected to stage a recovery, with the structural decline in demand forecast to continue, experts agreed. They stressed that improving profitability was a matter of survival for every single publication paper mill in Europe.

However, the wider market situation leaves paper mills with limited scope to push through higher prices. Experts see the LWC sector as facing the greatest challenges. Even if a post-summer pick-up in buying activity improves operating rates at paper mills, the sector will continue to suffer from falling demand and persistent surplus supply. Market players consider a swift decision by the European Commission on the proposed joint venture between market leaders Sappi and UPM to be urgent. A prompt decision could mark a significant and lasting step towards consolidation of the sector, they say.

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The status quo was a little different in the SC paper segment. Paper machines appear to be operating at pretty decent capacity utilisation looking at September and October, insiders stated. Any short-lived production stoppages like those seen in recent weeks would certainly create serious problems, industry sources remarked. However, paper buyers and producers consistently noted that alternative supplies had been successfully secured.

Nonetheless, paper mills face substantial cost pressure and see price adjustments as one possible response. After all, the SC paper business was certainly reaping the rewards of developments in the newsprint segment. The trend towards downgrading has stalled, sources said, with discussions now focusing instead on upgrading printed products. Paper industry representatives noted that customers were likely to show little understanding of possible increases in fourth-quarter prices. However, they also underscored the need to improve profitability and pointed to price developments in the adjacent newsprint segment.

Paper mills pushing for higher kraftliner prices in September

Further price increases for kraftliner are emerging in the German market at the beginning of September. In August, paper mills had issued fresh demands for price hikes of €80-100/t for brown and white-top kraftliner. EUWID's discussions with market participants from both the paper and corrugated industries in early September indicate that paper producers appear to have implemented a substantial part of the announced increases for both grades from the beginning of the month.

The situation on the semi-chemical fluting market was rather opaque at the start of September. Market players had yet to form a clear view of the outcome of price negotiations for this grade, which now holds a very small share of the German market in volume terms, for instance regarding the likely size of any increases and when they might take effect.

Insiders said that the renewed hike in brown and white-top kraftliner prices continues to be fuelled by strong demand for kraftliner, which reportedly remained unchanged in early September. EUWID contacts on both sides of the market continue to cite maintenance stoppages at kraftliner plants, reduced US deliveries and paper mills operating at high capacity utilisation rates as the main factors behind the latest round of increases. Corrugated board manufacturers had already pointed to a scanner supply of brown kraftliner, in particular, in recent weeks. Paper mill sources told EUWID that things were now increasingly tight for white-top kraftliner, too. It was hard for buyers to secure additional amounts beyond contracted allocations or such arrangements involved much longer lead times.

Producers of recycled corrugated case material had also announced price increases for brown grades and white-top testliner for September. EUWID's market discussions in early September indicate consistently that the latest increases for kraftliner in Germany are taking effect at around the same time as those for recycled containerboard. However, current indications suggest that the increases for brown kraftliner are likely to be higher than those for brown recycled

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grades. Corrugated industry players are critical of the widening price gap between the brown grades and do not rule out that this could encourage further substitution where technically feasible.

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Recovered paper prices rise slightly on the German market in September

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The combination of low collection volumes, good demand from the paper industry and more attractive export markets have resulted in a slight price uptick on the German recovered paper market in September. Market participants are reporting mark-ups particularly for brown ordinary grades. Sorted graphic paper for deinking and woodfree grades are also becoming more expensive.

In August, on the other hand, price movements were more subdued. According to the analysis of prices reported by recovered paper suppliers and converters, mixed paper and board (1.02) became €1.50/t more expensive month on month, while a rise of €1.00/t was recorded for supermarket corrugated paper and board (1.04). Prices for used corrugated kraft II (4.03) softened by €0.50/t. The upward price trend continued in August for sorted graphic paper for deinking (1.11) with an increase of €6.00/t. Coloured letters (2.05/2.06) gained €2.50/t, whereas a slight decrease of €0.50/t was reported for multi printing (3.10). After rising sharply in the previous month, prices for white newsprint/magazine paper (3.14/3.15) retreated by €2.00/t in August. By contrast, white woodfree uncoated shavings (3.18.01) became €7.50/t more expensive.

There has been more movement in September, at least for ordinary grades. The month got off to a very quiet start, but activity on the German recovered paper market picked up noticeably in the second week of September. Collection volumes remain low. The summer school holidays are now over in all German states, but experience has shown it takes a few weeks until higher recovered paper arisings become noticeable in the market.

At the same time, production activity at German paper mills is said to be relatively good. Capacity utilisation is stable, report EUWID respondents. Occasional machine downtime had been due exclusively to technical issues, they said. August had also proved somewhat better than initially expected. This trend then continued in September, insiders explained.

Recovered Paper Germany August 2026				
Monthly changes in €/t	August 2026	July 2026	June 2026	August 2025
Mixed paper and board (1.02)	+ 1.50	+ 2.00	+ 1.00	- 7.00
Supermarket corrugated paper and board (1.04)	+ 1.00	+ 1.50	+ 1.50	- 7.00
Used corrugated kraft II (4.03)	- 0.50	± 0.00	+ 2.00	- 6.00
Sorted graphic paper for deinking (1.11)	+ 6.00	+ 4.00	+ 1.50	- 1.00
Coloured letters (2.05/2.06) ¹⁾	+ 2.50	+ 4.50	+ 0.50	- 1.50
Multi printing (3.10)	- 0.50	+ 2.50	+ 1.00	- 7.50
White newsprint/magazine paper (3.14/3.15)	- 2.00	+ 18.00	+ 5.00	+ 8.50
White woodfree uncoated shavings (3.18.01)	+ 7.50	+ 3.00	+ 8.00	- 6.50
¹⁾ From January 2026, price reports for grade 2.05 will also be included in the assessment for coloured letters. Changes based on free delivered prices within Germany.				
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Several waste management companies reported stronger demand not only for brown ordinary grades but also for sorted graphic paper for deinking and, to a lesser extent, for woodfree recovered paper. As a result, prices were mainly described as stable to slightly higher.

The export market is providing additional support. Paper mills in India and Turkey, in particular, have begun to accept larger volumes of supermarket corrugated paper and board from Europe again. Consequently, export prices for brown ordinary grades are now more competitive than they were in August, particularly in regions close to North Sea ports. Here, waste management firms and merchants can use the better export opportunities as leverage in their negotiations with German paper mills.

Insiders' views on the availability of recovered paper vary somewhat. Some paper producers say supply remains totally sufficient, while others report they are already seeing noticeable tightening. Mills are accepting agreed volumes without any restrictions but sometimes had to pay higher prices to meet any additional demand, waste management firms say.

For supermarket corrugated paper and board, the majority of respondents assume prices will rise by around €5/t in September. Mark-ups of €10/t were also mentioned on occasion. However, some paper producers and waste management companies are still reporting unchanged prices for grade 1.04.

Converters point to continued cost pressure. September price increases for corrugated case material in September barely cover the rise in natural gas prices, they say. Other costs have risen as well. They say there is little scope to absorb higher recovered paper prices. Moreover, prices for 1.04 in France and Spain fell by around €10/t in August, while quotes held steady in Germany, they noted.

The export market's renewed interest in supermarket paper and board is also affecting mixed paper and board. It appears that paper mills are increasingly turning to grade 1.02, pushing prices higher for this material, too. Often, though, the mark-ups are a bit smaller than those for supermarket paper and board. Market participants point out that mixed paper is becoming increasingly brown, meaning it contains more corrugated board, and that the quality difference between the two grades is narrowing in many cases.

Deinking paper still sought-after

Demand for sorted graphic paper for deinking is still described as good. Demand from the remaining mills in Germany is consistently strong, while supply is limited due to the closure of several sorting facilities, EUWID was told. Moreover, prices of grade 1.11 still have some catching up to do with those of mixed paper, players said. Many respondents therefore put price increases at up to €5/t, while increases of up to €10/t were achieved in some cases in September.

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Price are also rising for woodfree grades. Here, demand remains solid, confirming the previously observed upward trend, market participants say. In most cases, players put price increases at €5-7.50/t, while market participants said some quotes were as much as €12/t above August levels.

Lagging price trend for used corrugated kraft, while bright white grades stable

It is a different story for used corrugated kraft grades, where demand is relatively subdued. Sellers in Germany complain that prices here have recently lagged behind those of brown ordinary grades, and therefore see a need for prices to catch up. At the same time, British material is being offered at significantly higher prices. Market participants explain this gap is at least partially due to the higher quality of the UK material on offer.

The sharp rise seen in July for newsprint/magazine paper (3.14/3.15) has continued to lose steam. In September, a few delayed hikes were implemented for customers who had not kept pace with the increases over the summer. Otherwise, prices were said to be stable compared with August levels.

The market for bright white grades in Germany is broadly balanced to slightly oversupplied, the market survey found. Demand is hovering at a normal level and prices are therefore stable. Market participants attribute this in part to the recent downtrend in pulp prices. However, pulp prices had previously risen significantly with barely any impact on prices for bright white recovered paper grades. The link between the two markets therefore remains weak.

Rising freight and energy costs and growing uncertainty due to Diwass

Industry players are worried about rising energy and transport costs. Higher natural gas and oil prices are adding to operating costs in an already difficult economic environment. And players increasingly feel that rising CO₂ costs are a burden.

The increase in freight costs is especially noticeable at present. Logistics capacity has become tighter and therefore more sought-after. A few hauliers are said to be raising their prices from week to week, despite prices generally being agreed on a monthly basis. "Free capacity is only available if you are willing to pay the higher prices," says one market participant.

The introduction of the EU's Digital Waste Shipment System (Diwass), which is used to exchange documentation for cross-border waste shipments electronically, is another source of concern for the recovered paper industry. Market participants say key technical specifications are still missing at EU level. Market participants say key technical specifications at the EU level are still missing. IT service providers are therefore unable to finish programming the necessary interfaces, holding up preparations by waste management companies and converters.

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And the clock is ticking: The transition period, during which firms may continue to use paper-based documentation, runs only until the end of 2026. Industry associations have recently called on the European Commission to allow the paper Annex VII forms to be used beyond the end of this year. They want to prevent technical problems associated with the Diwass launch from hampering the transboundary trade in recovered paper.

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