

# Solidus announces €75/t price increase

24 September 2026Published in issue 40/2026

**Dutch producer of unlined chipboard, coreboard and packaging Solidus is to increase prices by €75/t for all new orders placed from 1 October 2026 across all geographical markets.**

The company said the increase was necessary to address continued cost inflation and the resulting pressure on margins. Geopolitical tensions around the world are having a significant impact on energy and transport costs, while the prices of other inputs, including raw materials and chemicals, are also rising.



Despite considerable efforts to offset these increases through internal efficiency measures, Solidus has reached a point where a price adjustment is necessary to ensure the continued sustainable and reliable supply of high-quality products to its customers, the company added.

## Copyright notice

The individual articles, tables and other contents published by EUWID are protected by copyright and are provided exclusively for the client's own use and the use of the client's employees. In the absence of a more extensive licence agreement, only one copy may be printed for circulation at a single business location designated by the client. Digital distribution of EUWID contents, especially by intranet or by e-mail, within a company, throughout a group of companies, or outside a company is not permitted and constitutes an infringement of copyright law. Read more in our FAQ.

# Smurfit Westrock to acquire CMPC's containerboard and corrugated business in Chile

25 September 2026Published in issue 40/2026

Smurfit Westrock has announced that it will acquire the containerboard and corrugated packaging business of Chilean pulp and paper group Empresas CMPC. The purchase price was put at \$420m. An agreement has already been signed. Completion of the transaction is subject to approval by the relevant authorities and is expected during the first half of 2027.



*Smurfit Westrock will expand in Chile*

CMPC's corrugated division operates one recycled containerboard mill in Santiago with an annual capacity of 250,000 t. Smurfit Westrock plans to integrate the acquired mill into its regional production network and convert the paper produced there at its plants in Argentina, Peru and Ecuador.

The acquired corrugated business also includes three corrugated packaging plants, a moulded tray facility and several recovered paper collection centres, Smurfit Westrock said. The takeover would allow kraftliner from Smurfit Westrock mills in Brazil and North America to be processed at the Chilean plants, the company added.

With the move, Smurfit Westrock wants to expand its Latin American business. The acquisition would provide an opportunity to establish a leading position in Chile's containerboard and corrugated packaging market, the company said.

## Copyright notice

The individual articles, tables and other contents published by EUWID are protected by copyright and are provided exclusively for the client's own use and the use of the client's employees. In the absence of a more extensive licence agreement, only one copy may be printed for circulation at a single business location designated by the client. Digital distribution of EUWID contents, especially by intranet or by e-mail, within a company, throughout a group of companies, or outside a company is not permitted and constitutes an infringement of copyright law. Read more in our FAQ.

# La Rochette responds to employees' concerns, confirms production issues over the summer

EUWID + 29 September 2026 Valeria Buß | Published in issue 40/2026

French folding boxboard manufacturer La Rochette has commented on the current discussions surrounding the future of the mill and related uncertainty among its workforce. On 19 September, trade unions called for a 1-day strike to draw attention to employees' concerns.

They complained that production at the mill had declined sharply, the condition of the production facilities was deteriorating, and promised investments had failed to materialise. In addition, despite exercising their right to warn, they had not yet

received answers to questions about the company's financial health. Local media also reported on payment difficulties and delivery problems in recent weeks. Raw material suppliers were reportedly not paid and production was therefore stopped, reports said in mid-September.



*La Rochette employees went on a one-day strike to voice their concerns about the company's future*

La Rochette said in a statement that two external events were responsible for the strained financial situation in summer. Financing planned for July had not been paid out, the company said. At the same time, resumption of cartonboard production after the summer break had been delayed due to the drought, requiring additional funding at short-notice, it added. In the meantime, a solution has reportedly been found together with partners. The company says it is now working to whittle down the summer production backlog by the end of October.

## Company seeks financing solution for high energy costs

According to La Rochette, its owner – German investment fund Mutares – has met half of the July financing shortfall. Talks are also underway with various partners to find a solution to the sharp rise in energy costs. Government agencies have been asked for support, but so far without success, the company said.

### Copyright notice

The individual articles, tables and other contents published by EUWID are protected by copyright and are provided exclusively for the client's own use and the use of the client's employees. In the absence of a more extensive licence agreement, only one copy may be printed for circulation at a single business location designated by the client. Digital distribution of EUWID contents, especially by intranet or by e-mail, within a company, throughout a group of companies, or outside a company is not permitted and constitutes an infringement of copyright law. Read more in our FAQ.

Despite current difficulties and the challenging market environment, company management sees growth prospects. Changes in the competitive environment opened up new sales opportunities, La Rochette said, alluding to the insolvency of competitor Folbb and the closure of its two mills. The company said it is sticking to its strategic roadmap and sees good growth opportunities for the 2027- 2029 period.

La Rochette last reported in July on the interim status of its "Towards new heights" strategic plan, which was initiated in 2025 and is geared towards three years. At the time, the company emphasised, amongst others, that it had been able to return to positive Ebitda in 2025.

La Rochette has been part of Mutares since 2021. The company in southeastern France operates one machine with an output capacity of 165,000 tpy of GC 1 and GC 2 board. The board is mainly used in the food, pharmaceutical and cosmetics industries. According to the CGT trade union, La Rochette currently employs 260 people.

**Copyright notice**

The individual articles, tables and other contents published by EUWID are protected by copyright and are provided exclusively for the client's own use and the use of the client's employees. In the absence of a more extensive licence agreement, only one copy may be printed for circulation at a single business location designated by the client. Digital distribution of EUWID contents, especially by intranet or by e-mail, within a company, throughout a group of companies, or outside a company is not permitted and constitutes an infringement of copyright law. Read more in our FAQ.

# CCM prices in France rise in September across almost all grades

Graphic paper and cartonboard producers are demanding price increases

EUWID+ 30 September 2026 | Published in issue 40/2026

In France, during the last full week of September, manufacturers and buyers of newsprint were in negotiations regarding the price increases demanded for the fourth quarter. Newsprint is considered to have the best prospects for price rises due to a relatively balanced market. Some manufacturers of woodfree coated and uncoated paper are also demanding higher prices for October deliveries. However, towards the end of September, there were still no signs of any outcome from this initiative.

| EUWID Price Watch France                                     |                             |                             |                |
|--------------------------------------------------------------|-----------------------------|-----------------------------|----------------|
| September 2026                                               |                             |                             |                |
| Prices in € per tonne free delivered unless otherwise stated | September 2026              | August 2026                 | September 2025 |
| <b>Fine paper</b>                                            |                             |                             |                |
| Woodfree uncoated                                            |                             |                             |                |
| Copy paper 80 g A4 B grade                                   | 880 - 970                   | 880 - 990                   | 890 - 1,000    |
| Copy paper 80 g A4 C grade                                   | 820 - 920                   | 820 - 940                   | 840 - 950      |
| Offset sheets 80 g                                           | 920 - 990                   | 920 - 1,030                 | 920 - 1,020    |
| Offset reels 80 g                                            | 850 - 940                   | 870 - 950                   | 850 - 950      |
| Woodfree coated                                              |                             |                             |                |
| Sheets, double coated, 100 g                                 | 930 - 1,010                 | 940 - 1,050                 | 950 - 1,040    |
| Reels, double coated, 100 g                                  | 890 - 950                   | 900 - 990                   | 890 - 970      |
| <b>Publication paper</b>                                     |                             |                             |                |
| Standard newsprint 45 g                                      | 615 - 640                   | 615 - 640                   | 600 - 630      |
| Standard newsprint 42 g                                      | 625 - 650                   | 625 - 650                   | 610 - 640      |
| Improved newsprint ISO 68, 52 g                              | 655 - 680                   | 655 - 680                   | 650 - 680      |
| LWC offset 60 g                                              | 790 - 820                   | 790 - 820                   | 760 - 810      |
| LWC rotogravure 60 g                                         | 800 - 830                   | 800 - 830                   | 770 - 820      |
| SC offset 56 g (A)                                           | 670 - 700                   | 670 - 700                   | 660 - 710      |
| SC rotogravure 56 g (A)                                      | 670 - 700                   | 670 - 700                   | 660 - 710      |
| <b>Corrugated case material</b>                              |                             |                             |                |
| Primary fibre corrugated case material                       |                             |                             |                |
| Unbleached kraftliner 175 g+                                 | 950 - 1,050                 | 870 - 970                   | 770 - 880      |
| Semi-chemical fluting                                        | 660 - 710                   | 660 - 710                   | 620 - 690      |
| White-top kraftliner 140 g                                   | 990 - 1,110                 | 940 - 1,050                 | 880 - 990      |
| Recycled corrugated case material                            |                             |                             |                |
| Recycled fluting 100 g                                       | 730 - 765                   | 670 - 705                   | 590 - 625      |
| Recycled fluting 90 g                                        | 740 - 780                   | 680 - 720                   | 600 - 640      |
| Testliner 2                                                  | 750 - 790                   | 690 - 730                   | 610 - 650      |
| Testliner 3                                                  | 740 - 775                   | 680 - 715                   | 600 - 635      |
| White-top testliner, grade B, 140 g                          | 760 - 820                   | 720 - 780                   | 700 - 770      |
| <b>Cartonboard</b>                                           |                             |                             |                |
| GD 2                                                         | 830 - 960                   | 830 - 960                   | 840 - 970      |
| GC 2                                                         | 1,100 - 1,295 <sup>1)</sup> | 1,100 - 1,295 <sup>1)</sup> | 1,120 - 1,330  |

<sup>1)</sup> Prices include temporary surcharges of up to €35/t.

© 2026 EUWID Europäischer Wirtschaftsdienst GmbH  
All rights reserved

EUWID assumes no liability for the accuracy of pricing information.

Prices for corrugated case material have risen in

September, with the exception of semi-chemical fluting, which manufacturers intend to increase in October. Suppliers of cartonboard have likewise announced price hikes, for both GD and GC.

All paper and board manufacturers find themselves compelled to raise their selling prices due to costs having risen once again in recent months. However, the scope for price increases varies considerably, as there is overcapacity in some segments.

## Manufacturers of fine paper are fighting back against cost pressure

Manufacturers of woodfree coated and uncoated paper in Europe are responding to the current continued rise in production costs by announcing price increases. In France and across Europe at least four manufacturers have called for higher prices from October, and in one case as early as mid-September, although this was subsequently postponed until October.

### Copyright notice

The individual articles, tables and other contents published by EUWID are protected by copyright and are provided exclusively for the client's own use and the use of the client's employees. In the absence of a more extensive licence agreement, only one copy may be printed for circulation at a single business location designated by the client. Digital distribution of EUWID contents, especially by intranet or by e-mail, within a company, throughout a group of companies, or outside a company is not permitted and constitutes an infringement of copyright law. Read more in our FAQ.

Opinions among market players were divided – in some cases quite sharply – as to whether higher prices would indeed come into effect in October. Manufacturers emphasise that the price rise is absolutely necessary and point to the financial results reported by fine paper producers in the first half of the year. Producers explain that the price rises implemented in the spring were not sufficient to ensure a viable business operation. In the meantime, costs have continued to rise, and not just for energy and fuel.

Other market insiders contacted reported that, right up until the last full week, no higher prices had yet been observed. On the contrary, apart from the producers' announcements, no further steps had been taken towards concrete implementation, they say. In some cases, old prices had been confirmed upon request. Prices are currently often valid for only a short period, with 'until further notice' frequently cited.

Over the holiday period, prices for coated and uncoated fine paper came under pressure from low-priced offers and had to give up some or most of the price increases achieved in the spring. Many prices remained unchanged in September, but recently the trend has been slightly downwards. Paper manufacturers complain that low prices from some suppliers were particularly evident for coated grades. Market players interviewed by EUWID confirmed the wide range of prices for one and the same paper, even from a single manufacturer. Market insiders confirm that there can be a difference of over €100/t between spot lots at the lower end of the price range and some customers who were still paying high prices. This applies to cut-size, offset paper and also to coated reels and sheets.

In the fine market in France and across Europe, the question is repeatedly being asked as to what will now happen with the planned joint venture of the graphic papers divisions of UPM and Sappi. Alongside chronic weakness in demand, this is a key issue whose outcome will largely determine the market's future. It is widely acknowledged that capacity closures are necessary, but it appears that nothing will be done or announced in this regard until the European Commission's competition authorities have reached a decision.

### **Publication paper producers seek fourth-quarter price increases**

The latest hikes in energy costs and the imminent closure of newsprint capacity at Palm Paper's King's Lynn mill in the UK have added momentum to negotiations about fourth-quarter publication paper prices in France. Producers are seeking to charge more for newsprint, SC and LWC paper, although the negotiating conditions vary across the three segments.

Newsprint appears to be the segment most likely to see a price increase. Palm Paper's plans to discontinue newsprint production in the UK and convert the paper machine to packaging paper will materially alter the balance between supply and demand. The market is already regarded as relatively balanced, with average capacity utilisation rates higher than in the SC paper and LWC segments. The removal of a further 400,000 tpy of capacity, more than 10 per

#### **Copyright notice**

The individual articles, tables and other contents published by EUWID are protected by copyright and are provided exclusively for the client's own use and the use of the client's employees. In the absence of a more extensive licence agreement, only one copy may be printed for circulation at a single business location designated by the client. Digital distribution of EUWID contents, especially by intranet or by e-mail, within a company, throughout a group of companies, or outside a company is not permitted and constitutes an infringement of copyright law. Read more in our FAQ.

cent of Europe's total newsprint capacity (including improved grades), will boost utilisation rates at the remaining machines in Europe.

Although the paper machine in King's Lynn is still making newsprint, the conversion is already casting its shadow on market activity. Newsprint manufacturers have entered talks seeking hikes ranging from €20/t to €50/t. That said, €50/t is an exception, with many producers eyeing a figure of €30/t. Sources expect that there will be an increase, although negotiations were still in progress in the penultimate week of September.

SC paper producers are likewise seeking to raise their prices in current talks. Their demands are somewhat smaller than those for newsprint at €25-30/t. One manufacturer said that it intended to introduce an energy surcharge on top of the price increase. Insiders told EUWID that SC paper prices might also edge higher, although maybe less than newsprint prices.

LWC is another market segment where manufacturers feel that higher prices are urgently needed. Manufacturers of coated mechanical paper grades are seeking price increases similar to those for SC paper in the fourth quarter. Efforts to secure higher prices appear to be meeting with the strongest resistance in the LWC segment. Some EUWID contacts reported that producers had already revised their demands, but negotiations were ongoing, and the outcome was unclear.

Publication paper markets continue to experience a structural downward trend in demand, with the slump a little more pronounced for newsprint and SC than for LWC and MWC this year.

### **Corrugated case material prices still on an upward path in September**

French corrugated case material prices continued to edge higher in September. In late August, manufacturers and buyers were still discussing whether higher prices should be implemented from mid-month, but the hike ultimately took hold at the start of September.

Brown recycled corrugated case material costs €60/t more from 1 September. Uncoated white-top testliner has become €40/t more expensive in most cases, rising by €60/t in a few instances.

Manufacturers told EUWID that the increase was badly needed, underscoring the trend in costs, especially energy prices. One producer said that resistance to the price hike had eased after gas prices began climbing in late August. Manufacturers noted that the cost situation can vary markedly, depending on the mill and location, but that a €10 mark-up in the TTF gas price raised production costs by roughly twice that amount.

#### **Copyright notice**

The individual articles, tables and other contents published by EUWID are protected by copyright and are provided exclusively for the client's own use and the use of the client's employees. In the absence of a more extensive licence agreement, only one copy may be printed for circulation at a single business location designated by the client. Digital distribution of EUWID contents, especially by intranet or by e-mail, within a company, throughout a group of companies, or outside a company is not permitted and constitutes an infringement of copyright law. Read more in our FAQ.

Kraftliner also became more expensive in September, with brown kraftliner costing €80/t more and white-top kraftliner €60/t more. Market players told EUWID that the increase was negotiated with less controversy than the hike for recycled grades. The kraftliner market is still regarded as more balanced than the market for recycled grades, with surplus capacity barely playing a role. Insiders reported very small growth, with scheduled downtime curbing supply a little in recent months and imports from the US are much lower this year than last year.

Companies also announced higher prices for semi-chemical fluting, albeit to take hold in early October in the majority of cases. Insiders put the hike at €50-60/t.

Demand for corrugated case material was subject to strong seasonal volatility in France over the summer holidays. Manufacturers and converters told EUWID that July had been good, August had been weak and September was better again. Inventory levels remain moderate. France's corrugated board market is recording modest growth, with the increase more pronounced in square metres than in tonnes because of lower grammages.

Corrugated case material manufacturers said that they continue to face margin pressure as a result of the current trend in energy prices and costs, even though recovered paper prices are barely moving in September. Rising oil and gas prices sent both manufacturing and transportation costs higher, they pointed out. Producers noted that they might have to raise their prices again if energy prices continued to climb. At the very least, sources said, price cuts between now and the year's end were out of the question given the current energy price environment.

### **Producers announce price hikes for GD and GC board**

On the cartonboard market, price hikes were announced in September for both white-lined chipboard (WLC) and folding boxboard (FBB). Even though demand was less than brisk, shortly after the summer break GD board producers in particular began to send out notifications of rising prices to their customers and more and more GC suppliers soon did the same. During the month of September, however, quotes for both GD 2 as well as GC 2 were stable.

GD producers are generally asking their customers to pay mark-ups of between €70-80/t, in some cases starting already for deliveries as of 1 October. Producers who approached the market early on with their announcements say this date is feasible. Others reckon that implementation is more likely in the second half of October or even at the beginning of November. The announcements had come at much too short notice and implementation from October was impossible simply due to the delivery time, commented one packaging producer.

At the time of the EUWID market survey, the price talks had not yet concluded. Suppliers and buyers expected, though, that the full amount of the targeted price increases would not be implemented. Most respondents expected mark-ups of €40-50/t. One producer said he would try to introduce a second step in November and expected the total increase to reach around €60/t. A different supplier, by contrast, plans to implement a single price step in October

#### **Copyright notice**

The individual articles, tables and other contents published by EUWID are protected by copyright and are provided exclusively for the client's own use and the use of the client's employees. In the absence of a more extensive licence agreement, only one copy may be printed for circulation at a single business location designated by the client. Digital distribution of EUWID contents, especially by intranet or by e-mail, within a company, throughout a group of companies, or outside a company is not permitted and constitutes an infringement of copyright law. Read more in our FAQ.

and sign quarterly contracts valid until the end of the year.

The survey respondents did agree that a price hike would definitely occur. It was not a question of whether, but rather when and by how much prices would be raised, said one merchant. The cost pressure was too intense due to steep increases in energy, transport and chemicals costs, EUWID was told. Other GD producers also seem determined to stick to their price demands. "This is not about improving margins for us. We simply cannot continue on like this," said a different producer.

Market players said demand for GD board was not spectacular in September, although certainly better than in the traditionally quiet month of August. Some of the suppliers and customers surveyed by EUWID described a relatively normal start after the summer break, in line with the trend of recent months (excluding August). Others, however, said demand in September was weaker than usual. Delivery times for GD 2 were often between two and four weeks, respondents said.

Demand was also unexceptional in FBB segment in September, the market survey found. Packaging and cartonboard consumption remains generally weak and supply continues to outstrip demand. However, the closure of the two mills belonging to the insolvent Folbb group did positively influence order intake for some producers that make comparable grades. The affected suppliers reported that demand had improved somewhat. Yet, respondents believe that the absence of Folbb will have only a limited effect on the GC market in the long run, as the capacity overhang persists.

Producers in the FBB segment also announced price increases during September. Like their peers in the WLC segment, they cited sharply rising production and logistics costs as their argument. Some players were initially cautious, but once the market leaders had sent pricing announcements to their customers, the smaller suppliers followed suit.

Depending on the supplier, the envisaged amounts for GC range from €50-100/t. Where €100 is being targeted, previously implemented energy surcharges are said to be taken into account and deducted. Most producers are now seeking to increase their list prices. One supplier is reportedly considering a combination of a price hike and energy surcharge. The implementation dates are said to be end of October, early November or the second week of November, but later timing was also mentioned.

Talks in the GC market were still in an early stage at the time of the EUWID survey, so it was unclear what the outcome would be. Some players expected that implementation would be delayed. One market participant also pointed out that some contracts run until the end of this year.

**Copyright notice**

The individual articles, tables and other contents published by EUWID are protected by copyright and are provided exclusively for the client's own use and the use of the client's employees. In the absence of a more extensive licence agreement, only one copy may be printed for circulation at a single business location designated by the client. Digital distribution of EUWID contents, especially by intranet or by e-mail, within a company, throughout a group of companies, or outside a company is not permitted and constitutes an infringement of copyright law. Read more in our FAQ.

| France: pulp and paper production  |              |              |               |                |               |
|------------------------------------|--------------|--------------|---------------|----------------|---------------|
| January - June 2026                |              |              |               |                |               |
| 1,000 t                            | June         |              |               | Jan - June     |               |
|                                    | 2026         | 2025         | %             | 2026           | %             |
| <b>Total paper and board</b>       | <b>536.1</b> | <b>534.5</b> | <b>+ 0.3</b>  | <b>3,309.4</b> | <b>+ 0.5</b>  |
| thereof:                           |              |              |               |                |               |
| Graphic paper                      | 65.3         | 64.7         | + 1.0         | 392.8          | - 0.3         |
| thereof uncoated woodfree          | 37.4         | 35.9         | + 4.2         | 219.2          | + 2.0         |
| Packaging paper and board          | 372.4        | 368.0        | + 1.2         | 2,295.8        | + 1.0         |
| Corrugated case material           | 323.4        | 315.6        | + 2.5         | 2,003.3        | + 4.1         |
| Paper for flexible packaging       | 12.9         | 17.2         | - 25.2        | 67.1           | - 37.1        |
| Cartonboard                        | 36.1         | 35.1         | + 2.8         | 225.4          | - 6.8         |
| Sanitary paper                     | 69.3         | 71.2         | - 2.6         | 444.7          | + 0.4         |
| <b>Total Pulp</b>                  | <b>63.5</b>  | <b>97.9</b>  | <b>- 35.1</b> | <b>544.8</b>   | <b>- 16.6</b> |
| <b>Recovered paper consumption</b> | <b>418.9</b> | <b>406.8</b> | <b>+ 3.0</b>  | <b>2,580.6</b> | <b>+ 2.2</b>  |
| Source: COPACEL                    |              |              |               |                |               |

**Copyright notice**

The individual articles, tables and other contents published by EUWID are protected by copyright and are provided exclusively for the client's own use and the use of the client's employees. In the absence of a more extensive licence agreement, only one copy may be printed for circulation at a single business location designated by the client. Digital distribution of EUWID contents, especially by intranet or by e-mail, within a company, throughout a group of companies, or outside a company is not permitted and constitutes an infringement of copyright law. Read more in our FAQ.

# Negotiations on publication paper prices in final stages on the UK market

Uncertainty surrounds price rises for cartonboard and containerboard

🔗 **EUWID +** 30 September 2026 | Published in issue 40/2026

**Towards the end of September, negotiations were still ongoing in the UK publication paper market, which is facing significant changes. Paper manufacturers are demanding price rises across all grades. In the newsprint segment, market conditions are most likely to lead to a price increase due to the imminent refurbishment of the paper machine at Palm Paper in King's Lynn. Demands for higher prices have also emerged in the market for woodfree coated and uncoated grades, though so far without tangible results.**

| EUWID Price Watch UK                                         |                     |                      |                                                                     |                     |
|--------------------------------------------------------------|---------------------|----------------------|---------------------------------------------------------------------|---------------------|
| September 2026                                               |                     |                      |                                                                     |                     |
| Prices in € per tonne free delivered unless otherwise stated | September 2026<br>€ | September 2026<br>€* | August 2026<br>€                                                    | September 2025<br>€ |
| <b>Fine paper</b>                                            |                     |                      |                                                                     |                     |
| <b>Woodfree uncoated</b>                                     |                     |                      |                                                                     |                     |
| Copy paper 80 g A4 B grade                                   | 760 - 830           | 882 - 963            | 770 - 860                                                           | 770 - 840           |
| Copy paper 80 g A4 C grade                                   | 710 - 810           | 824 - 940            | 720 - 830                                                           | 730 - 810           |
| Offset sheets 80 g                                           | 810 - 870           | 940 - 1,009          | 830 - 890                                                           | 830 - 890           |
| Offset reels 80 g                                            | 740 - 810           | 858 - 940            | 750 - 830                                                           | 760 - 820           |
| <b>Woodfree coated</b>                                       |                     |                      |                                                                     |                     |
| Sheets, double coated, 115 g                                 | 830 - 900           | 963 - 1,044          | 850 - 940                                                           | 850 - 920           |
| Reels, double coated, 100 g                                  | 780 - 830           | 905 - 963            | 800 - 870                                                           | 780 - 840           |
| <b>Publication paper</b>                                     |                     |                      |                                                                     |                     |
| Standard newsprint 45 g                                      | 510 - 540           | 591 - 626            | 510 - 540                                                           | 480 - 510           |
| Standard newsprint 42.5 g                                    | 520 - 550           | 603 - 638            | 520 - 550                                                           | 490 - 520           |
| Standard newsprint 40 g                                      | 530 - 560           | 615 - 650            | 530 - 560                                                           | 500 - 530           |
| Improved newsprint 52 g ISO 68                               | 560 - 590           | 650 - 684            | 560 - 590                                                           | 530 - 560           |
| LWC offset 60 g                                              | 690 - 720           | 800 - 835            | 690 - 720                                                           | 660 - 700           |
| SC offset 56 g (A)                                           | 590 - 610           | 684 - 708            | 590 - 610                                                           | 580 - 610           |
| <b>Corrugated case material</b>                              |                     |                      |                                                                     |                     |
| <b>Primary fibre corrugated case material</b>                |                     |                      |                                                                     |                     |
| Unbleached kraftliner 175 g*, European quality               | 770 - 810           | 893 - 940            | 770 - 810                                                           | 695 - 745           |
| White-top kraftliner 140 g, European quality                 | 865 - 945           | 1,003 - 1,096        | 865 - 945                                                           | 805 - 875           |
| <b>Recycled corrugated case material</b>                     |                     |                      |                                                                     |                     |
| Recycled fluting 100 g                                       | 585 - 655           | 679 - 760            | 585 - 655                                                           | 530 - 580           |
| Recycled fluting 90 g                                        | 585 - 660           | 679 - 766            | 585 - 660                                                           | 530 - 585           |
| Recycled fluting 85 g                                        | 595 - 670           | 690 - 777            | 595 - 670                                                           | 540 - 595           |
| Testliner 2                                                  | 605 - 675           | 702 - 783            | 605 - 675                                                           | 550 - 600           |
| Testliner 3                                                  | 585 - 655           | 679 - 760            | 585 - 655                                                           | 530 - 580           |
| White-top testliner, grade B, 140 g                          | 675 - 725           | 783 - 841            | 675 - 725                                                           | 640 - 700           |
| <b>Cartonboard</b>                                           |                     |                      |                                                                     |                     |
| GD 2                                                         | 600 - 670           | 696 - 777            | 600 - 670                                                           | 600 - 680           |
| GC 2                                                         | 880 - 1,030         | 1,021 - 1,195        | 880 - 1,030                                                         | 910 - 1,010         |
| * Exchange rate as of 25 September 2026: £1 = €1.16          |                     |                      |                                                                     |                     |
| © 2026 EUWID Europäischer Wirtschaftsdienst GmbH             |                     |                      | EUWID assumes no liability for the accuracy of pricing information. |                     |
| All rights reserved                                          |                     |                      |                                                                     |                     |

Price rises are on the cards in the UK for both corrugated case material and cartonboard. However, even in the last full week of September, it remained unclear whether and to what extent these would be implemented. Corrugated board manufacturers are particularly critical of the ongoing uncertainty. Whilst higher paper prices are extremely unwelcome, the lack of planning certainty is an even greater challenge. In the cartonboard market, market insiders consider implementation from November at the earliest to be realistic, at least for GD board. At the same time, they emphasise that demand continues to leave much to be desired. It is only in the case of GD board that the recent, somewhat more positive trend is continuing.

## UK fine paper market sees price pressure and call for higher prices close together

Manufacturers of woodfree coated and uncoated paper are seeking a turnaround in prices, several manufacturers have announced plans to raise prices in October. This comes against a backdrop of recent price declines in some cases, which were observed in July and August and continued sometimes into September.

Among publicly announced price increases is that from Sappi, which is demanding a 5-7 per cent price increase for woodfree coated paper from 12 October. Burgo has also made its price demands public, calling for a 7-8 per cent increase for all grades of graphic and speciality papers. At least two other producers have stated that they intend to charge higher prices from October.

Towards the end of September, it was not yet clear whether these increases would be accepted. Opinions on this vary widely depending on who you speak to. Manufacturers point to constantly rising costs and the enormous pressure this trend is placing on their profits. Other sources in the market simply state that a price increase would be very difficult, if not virtually impossible, under the current circumstances.

At present, the European market is estimated to have overcapacity of one million tpy each for woodfree coated and uncoated paper, with total capacity for both categories combined standing at over 8 million tpy. Total demand this year is expected to barely exceed six million tonnes.

From July through to September, a generally downward trend in prices across all grades has partially or completely reversed the price increases implemented in March or April. Market insiders explain that pricing for most grades varies considerably from customer to customer and from manufacturer to manufacturer. 'Astonishing' offers are a recurring feature, and the price range for a single product remains very wide.

The market is awaiting a decision from Brussels on the planned merger of UPM and Sappi's printing and writing paper businesses in Europe. The coated woodfree paper segment is heavily involved in this, as the two companies together hold a very strong position in this area. Capacity cutbacks are expected, even in the event of a veto by the regulatory authorities. However, market sources say that nothing will change until a decision is made in Brussels.

### **Price negotiations for publication paper in the final stages**

In the second half of September, publication paper manufacturers and buyers are negotiating prices in the UK for the fourth quarter. The main issue is the price increases demanded by the manufacturers.

The newsprint market is negotiating a price rise of between 30 and 50 £/t, depending on the manufacturer. Paper manufacturers now hold slightly stronger cards in the price negotiations, given the imminent cessation of newsprint production on the paper machine at Palm Paper in King's Lynn. Many market participants expect this to bring about noticeable changes to the newsprint market, particularly in the UK. The output of the machine, which can produce up to 400,000 tpy, will have to be replaced by other suppliers, which will increase their capacity utilisation. Even if the

#### **Copyright notice**

The individual articles, tables and other contents published by EUWID are protected by copyright and are provided exclusively for the client's own use and the use of the client's employees. In the absence of a more extensive licence agreement, only one copy may be printed for circulation at a single business location designated by the client. Digital distribution of EUWID contents, especially by intranet or by e-mail, within a company, throughout a group of companies, or outside a company is not permitted and constitutes an infringement of copyright law. Read more in our FAQ.

paper machine at Palm Paper was not operating at full capacity and UPM now also offers newsprint from its Caledonian Paper, there are still some volumes to be allocated to other producers. And although newsprint consumption in the UK is set to fall significantly again this year, it is expected that supply and demand will be balanced by the time the paper machine at King's Lynn ceases operations at the latest.

Against the backdrop of this market situation, newsprint producers are confident that they will be able to secure at least a large proportion of their price demands. European manufacturers are all plagued by margin and cost problems, which have been further exacerbated by rising energy and fuel costs. On the buyer's side, however, there are similar problems, and customers point out that the paper machine at Palm is still producing newsprint, albeit for only another three months.

There has been no supply pressure from North American manufacturers for some time now; they point out that the European market has lost part of its appeal for them given relatively low prices there. A Canadian producer explained in an interview that it is currently possible to sell on better terms in North America and Asia, and in this context also referred to capacity closures in North America.

There is a great deal at stake in the current negotiations. Paper manufacturers view price increases as an absolute necessity, whilst buyers are either unwilling or unable to absorb rising paper costs and argue that significant increases in paper prices would have a noticeably negative impact on paper consumption in the near future.

Manufacturers have also put forward demands for price increases for magazine paper, with SC papers considered most likely to be sold at higher prices in the fourth quarter. The price demands for SC papers are lower than for newsprint and range between 20 and 30 £/t, similar figures are also reported for LWC. Negotiations were still ongoing at the time of going to press.

There is still overcapacity in Europe for SC papers and, in particular, for LWC, which increases cost pressure on manufacturers and tends to weaken their negotiating position. Furthermore, the urgently needed consolidation process in the European printing and writing paper industry is stalling due to the planned joint venture between UPM and Sappi. Particularly in the coated mechanical paper segment, where the two companies account for a large proportion of existing production capacity, there is a need to adjust capacity levels. However, no decisions on capacity management are likely to be taken until a final decision on the planned merger has been reached.

### **Uncertainty over new containerboard prices weighs on UK corrugated market**

#### **Copyright notice**

The individual articles, tables and other contents published by EUWID are protected by copyright and are provided exclusively for the client's own use and the use of the client's employees. In the absence of a more extensive licence agreement, only one copy may be printed for circulation at a single business location designated by the client. Digital distribution of EUWID contents, especially by intranet or by e-mail, within a company, throughout a group of companies, or outside a company is not permitted and constitutes an infringement of copyright law. Read more in our FAQ.

Demand for containerboard and corrugated sheets and boxes in the UK remained generally satisfactory in September, but with few exceptions it was far from buoyant. Against this backdrop, the latest round of proposed containerboard price increases is proving highly contentious. Even in the penultimate week of the month, considerable uncertainty remained over what prices would actually apply in October.

Producers are seeking increases of £70-75/t for brown kraftliner. For white-top kraftliner and brown recycled containerboard, the proposed increases are around £50/t, while about £35/t is being discussed for white-top testliner.

Suppliers report tight availability of kraftliner. Some recycled grades are also said to be difficult to source at short notice in the UK. Converters, however, do not share the view that there is any genuine shortage. They say all required volumes can still be obtained in the right quantities and at the required time.

Converters are highly sceptical about the paper producers' current pricing plans. One point of criticism is the short notice given for some of the increases. At least one supplier is said to have informed customers only around three weeks before the planned implementation at the beginning of October.

"We are in constant contact with our suppliers and still do not have any clarity about what prices will apply from October," one converter complained. Paper suppliers also confirmed that negotiations had dragged on unusually long on the UK market in September. Price increases were extremely unwelcome, one converter told EUWID, but the continuing uncertainty was even worse.

Many converters are also still dealing with the effects of the paper price increases implemented in the spring. Due to quarterly or other longer-term contracts, these can in some cases only be passed on to customers with a considerable delay, for example from the fourth quarter. By that point, however, the next round of paper price increases would already be under way.

Corrugated packaging producers also see little scope to pass higher paper prices on to their customers. The last paper price increase in the spring triggered a "wave" of tenders from major corrugated packaging buyers, causing considerable nervousness and shifts in the market. For many companies, the priority is therefore to protect existing volumes and customer relationships. Business is currently reasonably good, but the situation is described as extremely fragile.

Packaging producers are thus faced with the choice of absorbing higher paper costs themselves or reopening price discussions with customers. Neither option is considered particularly attractive under current market conditions.

Moreover, market participants say AI-supported tendering processes are creating additional frustration. Important information and direct points of contact are often missing, meaning that procedures tend to take longer rather than becoming more efficient.

**Copyright notice**

The individual articles, tables and other contents published by EUWID are protected by copyright and are provided exclusively for the client's own use and the use of the client's employees. In the absence of a more extensive licence agreement, only one copy may be printed for circulation at a single business location designated by the client. Digital distribution of EUWID contents, especially by intranet or by e-mail, within a company, throughout a group of companies, or outside a company is not permitted and constitutes an infringement of copyright law. Read more in our FAQ.

Some converters also question the timing of the current round of price increases. They describe it as opportunistic and, in some cases, as a “last chance” before new UK containerboard capacity comes on stream from 2027 and creates additional pressure on prices.

There is therefore also speculation in the market that the UK could once again go its own way during the current price round, as has happened on several occasions in recent years. One possibility being discussed is that increases already implemented in continental Europe may not be accepted either partly or in full in the UK, potentially leading, ultimately, to some of the increases being reversed in the European mainland markets.

More generally, the prospect of greater independence for the UK market is viewed positively. With additional domestic capacity of around 1 million t net, taking announced closures into account, the UK could in future become less dependent on developments in continental Europe and perhaps even exert greater influence on the direction of European prices.

Producers of corrugated sheets and packaging remain generally well occupied. Seasonal business and e-commerce are providing additional support. Longer lead times are being reported for sheets, particularly from some larger suppliers, although these are attributed more to internal developments at individual companies than to exceptionally strong market demand. The market is also watching developments in Ellesmere Port with considerable interest, where a new joint venture is installing an additional corrugator.

### **Higher prices for cartonboard in the UK still uncertain**

In the UK cartonboard market, persistently unsatisfactory demand in September is meeting calls for higher prices. According to market participants speaking to EUWID, demand picked up somewhat again in September, but is still described by most players as “too quiet”. As is usual at this time of year, some impetus is coming from Christmas-related business. Production of packaging for frozen Christmas products is largely complete, while chilled food products are now moving more into focus.

High energy prices and the generally uncertain economic environment have been weighing on consumer sentiment and companies’ willingness to invest since February. This has now been compounded by uncertainty ahead of the UK Budget on 28 October. With the British government facing tight public finances, businesses fear that the Budget could bring higher taxes or other additional burdens, prompting further caution in purchasing and investment decisions.

In the folding boxboard (FBB) market, the missing GC volumes from Folbb have led to some shifts in supply. In addition, one producer temporarily halted production over the summer, partly due to a lack of water, and is now apparently working through the resulting backlog. Another supplier experienced problems in converting.

#### **Copyright notice**

The individual articles, tables and other contents published by EUWID are protected by copyright and are provided exclusively for the client's own use and the use of the client's employees. In the absence of a more extensive licence agreement, only one copy may be printed for circulation at a single business location designated by the client. Digital distribution of EUWID contents, especially by intranet or by e-mail, within a company, throughout a group of companies, or outside a company is not permitted and constitutes an infringement of copyright law. Read more in our FAQ.

Lead times, however, continue to vary considerably. Material from established mills is said in some cases to have very long lead times, while suppliers with new capacity can deliver much more quickly.

Many European GC producers have now informed customers of planned price increases, while some suppliers have yet to position themselves. For GC 2, increases of £75-85/t are frequently being sought. In many cases, existing energy surcharges are to be incorporated into the base price and offset against the announced increase.

Suppliers from the Far East and India are also said to have announced increases, in some cases in the form of freight surcharges.

Market participants largely expect higher GC prices to be implemented in principle, but anticipate that the actual increase will be significantly lower than currently sought. The timing also remains open. Hardly anyone expects implementation as early as October. November is seen as possible, although many market players consider an increase at the turn of the year to be the most likely scenario. In the course of negotiations, some buyers are also reportedly pushing more strongly for longer contract periods again.

In the GD board market, too, numerous major suppliers have sent out price increase letters with demands to tack on £60-70/t. Some producers have left either the implementation date or the amount or both open.

Lead times for GD are, however, significantly shorter than for GC and generally stand at four to six weeks for deliveries to the UK. Eight weeks is only rarely quoted. This means that implementation of higher prices from November is at least conceivable. Nevertheless, market participants also expect the actual increase to fall short of the amount sought. For October, the market is largely expecting prices to roll over.

The comparatively better position for GD is also supported by indications that the grade is regaining market share in the UK after a prolonged period of weakness. Some experts estimate market growth at 3-4 per cent year on year, while others see an even stronger increase. There is also broad acknowledgement that GD producers have been affected much more severely by the escalation in costs than producers of primary-fibre cartonboard.

Several market participants expect cartonboard suppliers initially to negotiate new supply terms for GC and GD with their largest and most important customers, including major converters, brand owners and supermarket chains. The results achieved in these negotiations are then likely to serve as a benchmark for talks with smaller converters.

**Copyright notice**

The individual articles, tables and other contents published by EUWID are protected by copyright and are provided exclusively for the client's own use and the use of the client's employees. In the absence of a more extensive licence agreement, only one copy may be printed for circulation at a single business location designated by the client. Digital distribution of EUWID contents, especially by intranet or by e-mail, within a company, throughout a group of companies, or outside a company is not permitted and constitutes an infringement of copyright law. Read more in our FAQ.

| UK key market data                                        |                |                |              |                  |                  |              |
|-----------------------------------------------------------|----------------|----------------|--------------|------------------|------------------|--------------|
| June 2026                                                 |                |                |              |                  |                  |              |
| in tonnes                                                 | June           |                |              | January - June   |                  |              |
|                                                           | 2026           | 2025           | %            | 2026             | 2025             | %            |
| <b>Production</b>                                         |                |                |              |                  |                  |              |
| Corrugated case materials                                 | 122,655        | 112,219        | + 9.3        | 708,604          | 692,673          | + 2.3        |
| Recycled Fluting                                          | 61,478         | 50,925         | + 20.7       | 346,892          | 341,261          | + 1.7        |
| Testliner                                                 | 61,177         | 61,294         | - 0.2        | 361,712          | 351,412          | + 2.9        |
| Parent reels of tissue                                    | 58,058         | 58,225         | - 0.3        | 361,388          | 356,639          | + 1.3        |
| Other papers and boards, incl. printing and writing paper | 82,873         | 79,636         | + 4.1        | 537,387          | 555,805          | - 3.3        |
| <b>Total paper and board</b>                              | <b>263,586</b> | <b>250,080</b> | <b>+ 5.4</b> | <b>1,607,379</b> | <b>1,605,117</b> | <b>+ 0.1</b> |
| <b>Apparent Consumption</b>                               |                |                |              |                  |                  |              |
| Packaging paper and board                                 | n. a.          | n. a.          | n. a.        | 1,827,131        | 1,807,411        | + 1.1        |
| Corrugated case materials                                 | 188,308        | 181,985        | + 3.5        | 1,193,402        | 1,176,944        | + 1.4        |
| Kraftliner and SC Fluting                                 | 4,441          | 12,406         | - 64.2       | 177,593          | 180,062          | - 1.4        |
| Recycled Fluting                                          | 73,401         | 64,391         | + 14.0       | 399,768          | 412,453          | - 3.1        |
| Testliner                                                 | 110,466        | 105,188        | + 5.0        | 616,041          | 584,429          | + 5.4        |
| Cartonboard and other board for packaging                 | n. a.          | n. a.          | n. a.        | 505,917          | 495,447          | + 2.1        |
| Packaging papers                                          | n. a.          | n. a.          | n. a.        | 127,813          | 135,021          | - 5.3        |
| Parent reels of tissue                                    | 92,399         | 94,884         | - 2.6        | 557,750          | 559,031          | - 0.2        |
| Printings and writings                                    | n. a.          | n. a.          | n. a.        | 639,945          | 621,350          | + 3.0        |
| Uncoated mechanical                                       | n. a.          | n. a.          | n. a.        | 98,946           | 99,779           | - 0.8        |
| Uncoated woodfree                                         | n. a.          | n. a.          | n. a.        | 269,038          | 253,524          | + 6.1        |
| Coated mechanical                                         | n. a.          | n. a.          | n. a.        | 152,932          | 147,535          | + 3.7        |
| Coated woodfree                                           | n. a.          | n. a.          | n. a.        | 119,028          | 120,512          | - 1.2        |
| Other papers and boards                                   | n. a.          | n. a.          | n. a.        | 276,774          | 303,257          | - 8.7        |
| <b>Total paper and board</b>                              | <b>543,603</b> | <b>529,479</b> | <b>+ 2.7</b> | <b>3,301,601</b> | <b>3,291,050</b> | <b>+ 0.3</b> |
| <b>Exports</b>                                            |                |                |              |                  |                  |              |
| Corrugated case materials                                 | 17,057         | 11,411         | + 49.5       | 93,993           | 63,751           | + 47.4       |
| Recycled Fluting                                          | 7,502          | 4,305          | + 74.3       | 40,711           | 25,443           | + 60.0       |
| Testliner                                                 | 9,555          | 7,106          | + 34.5       | 53,282           | 38,308           | + 39.1       |
| Other papers and boards, incl. printing and writing paper | 45,879         | 52,402         | - 12.4       | 280,692          | 305,656          | - 8.2        |
| <b>Total paper and board</b>                              | <b>62,936</b>  | <b>63,813</b>  | <b>- 1.4</b> | <b>374,685</b>   | <b>369,407</b>   | <b>+ 1.4</b> |
| <b>Imports</b>                                            |                |                |              |                  |                  |              |
| Corrugated case materials                                 | 82,710         | 81,177         | + 1.9        | 578,791          | 548,022          | + 5.6        |

**Copyright notice**

The individual articles, tables and other contents published by EUWID are protected by copyright and are provided exclusively for the client's own use and the use of the client's employees. In the absence of a more extensive licence agreement, only one copy may be printed for circulation at a single business location designated by the client. Digital distribution of EUWID contents, especially by intranet or by e-mail, within a company, throughout a group of companies, or outside a company is not permitted and constitutes an infringement of copyright law. Read more in our FAQ.

|                                                              |                |                |              |                  |                  |              |
|--------------------------------------------------------------|----------------|----------------|--------------|------------------|------------------|--------------|
| Kraftliner and SC Fluting                                    | 4,441          | 12,406         | - 64.2       | 177,593          | 180,062          | - 1.4        |
| Recycled Fluting                                             | 19,425         | 17,771         | + 9.3        | 93,587           | 96,635           | - 3.2        |
| Testliner                                                    | 58,844         | 51,000         | + 15.4       | 307,611          | 271,325          | + 13.4       |
| Parent reels of tissue                                       | 34,365         | 37,206         | - 7.6        | 196,784          | 205,420          | - 4.2        |
| Other papers and boards,<br>incl. printing and writing paper | 225,878        | 224,829        | + 0.5        | 1,293,332        | 1,301,898        | - 0.7        |
| <b>Total paper and board</b>                                 | <b>342,953</b> | <b>343,212</b> | <b>- 0.1</b> | <b>2,068,907</b> | <b>2,055,340</b> | <b>+ 0.7</b> |
| <b>Fibre</b>                                                 |                |                |              |                  |                  |              |
| Woodpulp mill usage                                          |                |                |              |                  |                  |              |
| Sulphate Bleached Softwood                                   | 21,924         | 24,681         | - 11.2       | 149,967          | 144,276          | + 3.9        |
| Sulphate Bleached Hardwood                                   | 33,770         | 29,376         | + 15.0       | 212,871          | 189,993          | + 12.0       |
| Other grades of woodpulp                                     | 17,860         | 13,199         | + 35.3       | 106,155          | 107,062          | - 0.8        |
| Woodpulp imports                                             |                |                |              |                  |                  |              |
| Sulphate Bleached Softwood                                   | 25,652         | 21,024         | + 22.0       | 131,803          | 119,813          | + 10.0       |
| Sulphate Bleached Hardwood                                   | 40,911         | 28,761         | + 42.2       | 233,943          | 210,379          | + 11.2       |
| Other grades of woodpulp                                     | 1,501          | 2,810          | - 46.6       | 11,077           | 16,604           | - 33.3       |
| Recovered paper                                              |                |                |              |                  |                  |              |
| Mill usage                                                   | 188,313        | 189,003        | - 0.4        | 1,215,326        | 1,246,991        | - 2.5        |
| Collection                                                   | 486,376        | 490,074        | - 0.8        | 3,335,464        | 3,144,710        | + 6.1        |

Source: CPI

**Copyright notice**

The individual articles, tables and other contents published by EUWID are protected by copyright and are provided exclusively for the client's own use and the use of the client's employees. In the absence of a more extensive licence agreement, only one copy may be printed for circulation at a single business location designated by the client. Digital distribution of EUWID contents, especially by intranet or by e-mail, within a company, throughout a group of companies, or outside a company is not permitted and constitutes an infringement of copyright law. Read more in our FAQ.

**Copyright notice**

The individual articles, tables and other contents published by EUWID are protected by copyright and are provided exclusively for the client's own use and the use of the client's employees. In the absence of a more extensive licence agreement, only one copy may be printed for circulation at a single business location designated by the client. Digital distribution of EUWID contents, especially by intranet or by e-mail, within a company, throughout a group of companies, or outside a company is not permitted and constitutes an infringement of copyright law. Read more in our FAQ.

# Corrugated case material prices rise further in Italy in September

Fine paper and cartonboard manufacturers announces price increases

 **EUWID** + 30 September 2026 | Published in issue 40/2026

**The rapid rise in gas prices in August and September has put the paper industry under pressure. Numerous paper and board producers have responded to the higher costs by announcing price increases for deliveries in the final months of the year. In Italy, mills are also calling for government relief and are considering temporary production shutdowns if the balance between prices and costs does not improve.**

Producers of kraftliner and recycled containerboard raised their selling prices in September in Italy and are negotiating further increases for October deliveries. They are using the continued tight supply of brown kraftliner to support their demands. Cartonboard and fine paper producers also launched new price hike initiatives in September. The announced increases for folding boxboard, scheduled to take effect in November, suggest an extended round of negotiations that may ultimately raise prices for deliveries in the new year.

Producers were also seeking higher newsprint and magazine paper prices for fourth quarter deliveries in Italy. By mid to late September, negotiations for publication paper were nearing completion.

## Fine paper manufacturers in a tough situation at summer's end

Fine paper producers find themselves in an unenviable situation at the end of the summer. Prices came under downward pressure over the summer after paper producers succeeded in implementing price hikes of mostly €50-60/t for woodfree coated paper and €40-50/t for uncoated grades in the second quarter. EUWID sources reported a series of smaller price cuts taking hold at varying points in time during the third quarter. Additionally, there are reports of abundant spot volumes that are selling at prices well below prevailing market levels.

| EUWID Price Watch Italy                                      |                           |                           |                |
|--------------------------------------------------------------|---------------------------|---------------------------|----------------|
| September 2026                                               |                           |                           |                |
| Prices in € per tonne free delivered unless otherwise stated | September 2026            | July 2026                 | September 2025 |
| <b>Fine paper</b>                                            |                           |                           |                |
| <b>Woodfree uncoated</b>                                     |                           |                           |                |
| Copy paper 80 g A4 B grade                                   | 900 - 970                 | 920 - 990                 | 900 - 980      |
| Copy paper 80 g A4 C grade                                   | 780 - 870                 | 800 - 890                 | 790 - 890      |
| Offset sheets 80 g                                           | 880 - 960                 | 900 - 980                 | 900 - 970      |
| Offset reels 80 g                                            | 790 - 870                 | 810 - 890                 | 790 - 890      |
| <b>Woodfree coated</b>                                       |                           |                           |                |
| Sheets, double coated, 100 g                                 | 930 - 1,010               | 950 - 1,040               | 930 - 1,020    |
| Reels, double coated, 100 g                                  | 860 - 920                 | 870 - 940                 | 840 - 920      |
| <b>Publication paper</b>                                     |                           |                           |                |
| Standard newsprint 45 g                                      | 595 - 625                 | 595 - 625                 | 580 - 610      |
| Standard newsprint 42 g                                      | 605 - 635                 | 605 - 635                 | 590 - 620      |
| Improved newsprint ISO 68, 52 g                              | 615 - 645                 | 615 - 645                 | 610 - 630      |
| LWC offset 60 g                                              | 740 - 790                 | 740 - 790                 | 730 - 770      |
| SC offset 56 g (A)                                           | 630 - 660                 | 630 - 660                 | 630 - 660      |
| SC offset 52 g (A)                                           | 640 - 670                 | 640 - 670                 | 640 - 670      |
| <b>Corrugated case material</b>                              |                           |                           |                |
| <b>Primary fibre corrugated case material</b>                |                           |                           |                |
| Unbleached kraftliner 175 g+, European quality               | 740 - 770                 | 700 - 740                 | 640 - 670      |
| White-top kraftliner 140 g, European quality                 | 840 - 900                 | 800 - 880                 | 790 - 840      |
| <b>Recycled corrugated case material</b>                     |                           |                           |                |
| Recycled fluting, European quality                           | 455 - 470                 | 415 - 430                 | 350 - 370      |
| Testliner 2, European quality                                | 495 - 510                 | 455 - 470                 | 390 - 410      |
| Testliner 3, European quality                                | 465 - 480                 | 425 - 440                 | 360 - 380      |
| White-top testliner, grade C, 140 g, European quality        | 560 - 580                 | 530 - 560                 | 510 - 530      |
| Medium, Italian quality                                      | 400 - 420                 | 365 - 380                 | 310 - 320      |
| Testliner 4, Italian quality                                 | 410 - 430                 | 375 - 390                 | 320 - 330      |
| <b>Cartonboard</b>                                           |                           |                           |                |
| GD 2                                                         | 590 - 670                 | 590 - 670                 | 600 - 670      |
| GD 3                                                         | 570 - 610                 | 570 - 610                 | 560 - 610      |
| GC 2                                                         | 930 - 1,110 <sup>1)</sup> | 930 - 1,110 <sup>1)</sup> | 970 - 1,120    |

<sup>1)</sup> Prices include temporary surcharges of up to 30 €/t.

© 2026 EUWID Europäischer Wirtschaftsdienst GmbH

All rights reserved

EUWID assumes no liability for the accuracy of pricing information.

Market players feel that falling prices were primarily due to persistently weak demand and resulting thin order books at European fine paper mills. Capacity utilisation across European paper mills had already deteriorated at the end of the second quarter, and the downward trend continued over the summer. As a result, some paper mills not only in Italy reportedly took more downtime in August than is customary during the holiday period, followed by further short stoppages and production curtailments in September.

The downward trend in prices is weighing heavily on the paper industry, especially for mills heavily reliant on gas in the production process. Non-integrated manufacturers are also closely watching developments in pulp prices. One paper producer told EUWID that pulp prices had declined far less than expected in the third quarter and that some suppliers were already seeking fresh increases.

Against this backdrop, several manufacturers have launched a new round of hikes for woodfree coated and uncoated paper grades. Producers are seeking increases of 4-8 per cent, mostly for deliveries from October onwards. One paper producer stressed that such increases were essential to safeguard mills' long-term viability. Another argued that the move amounted to more than an attempt to influence the current price trend and halt the decline in prices seen since July.

However, some buyers indicated to EUWID that a few paper mills were already undermining their own demands. Within just a few days, they are said to have scaled back proposed increases or put them on hold for a few weeks. One uncoated woodfree paper manufacturer was also reported to have reduced prices for October deliveries, moving against the broader market trend.

### **Publication paper producers pushing for additional price increases in Q4**

Publication paper manufacturers have raised their selling prices by a total of €30/t so far this year through a series of smaller increases. They have now tabled plans for an additional hike for fourth-quarter deliveries. Paper mills originally sought to increase their prices by €40-50/t, sometimes more, but have already had to scale back their demands after initial talks with customers.

The paper industry's customers are not universally supportive of the approach taken by paper manufacturers. Some complain that paper producers want to keep raising their prices despite the absence of any positive demand signals for a long time. Others object to the multiple small price increases, which would not allow them to pass higher paper procurement costs on to their own customers without delay.

#### **Copyright notice**

The individual articles, tables and other contents published by EUWID are protected by copyright and are provided exclusively for the client's own use and the use of the client's employees. In the absence of a more extensive licence agreement, only one copy may be printed for circulation at a single business location designated by the client. Digital distribution of EUWID contents, especially by intranet or by e-mail, within a company, throughout a group of companies, or outside a company is not permitted and constitutes an infringement of copyright law. Read more in our FAQ.

It therefore comes as no surprise that not all Italian contracts for October deliveries had been finalised by the final fortnight of September. One printer said that he still wanted to agree the final newsprint price with one or two suppliers, as the offers were somewhat “outside its budget”. One buyer of newsprint and SC paper hoped to maintain October prices unchanged before an increase took effect in November. In the LWC market, market players repeatedly suggested that prices might be rolled over into the fourth quarter.

In conversations with EUWID, paper manufacturers left no doubt that the hike for fourth-quarter deliveries would take hold. Producers felt that the newsprint market, in particular, offered scope for mark-ups. Some suppliers underscored certain difficulties in talks about LWC and SC prices but think that a favourable outcome is possible in the current round of talks with a little luck and negotiating skill.

In light of the new, tense cost situation, manufacturers feel that they have no choice but to raise their selling prices if paper mills’ future is to be ensured. Some paper manufacturers are frustrated with buyers who want to renegotiate every order and every price. In their view, such customers overlook the fact that printers’ and publishers’ security of supply, and, ultimately, the printing business model itself, depends on how successfully paper mills weather the current crisis.

Paper suppliers are counting on traditionally favourable fourth-quarter print business for flyers and advertising inserts to support their plans to charge more. Although the segment was known to be under substantial pressure, printers needed to run their plants at full capacity during the Christmas campaign, one producer said, noting that this could only happen if paper supply was good and reliable. However, the paper industry’s customers are unruffled. Paper for these orders had already been purchased and, in some cases, was already in stock. They also point out that paper supply remains ample on the publication paper market and that overall availability is more than adequate.

### **Kraftliner and recycled corrugated case material prices climb again in Italy**

Insiders active on Italy’s corrugated case material market were busy with price negotiations over the summer and until recently. Immediately after the customary August break, everything focused on the terms of supply agreements for kraftliner and recycled grades.

For white-top and brown kraftliner suppliers, it took a little longer for the second round of hikes to be implemented in Italy than in other European countries. Prices started to climb for deliveries from July onwards, with negotiations not wrapped up until August or sometimes even September, depending on the supplier and customer in question. Ultimately, brown kraftliner suppliers in Italy secured price increases broadly comparable with those in other European markets. The actual price hikes are much smaller than the announced plans for white-top kraftliner and, in particular, semi-chemical fluting.

#### **Copyright notice**

The individual articles, tables and other contents published by EUWID are protected by copyright and are provided exclusively for the client's own use and the use of the client's employees. In the absence of a more extensive licence agreement, only one copy may be printed for circulation at a single business location designated by the client. Digital distribution of EUWID contents, especially by intranet or by e-mail, within a company, throughout a group of companies, or outside a company is not permitted and constitutes an infringement of copyright law. Read more in our FAQ.

In August, brown and white-top kraftliner manufacturers had already put forward plans for additional hikes of up to 100 €/t for September deliveries. Since the implementation of a new round of increases from 1 September often overlapped with the finalisation of the second round on the Italian kraftliner market, market participants report differing approaches. Some suppliers plan to raise selling prices by the largest possible amount in a single step at the next available opportunity. In some cases, they are said to have done so for September deliveries. Other EUWID sources on both sides of the market again consider a more gradual implementation of the latest increase over several months to be possible.

Italy's brown kraftliner market remains firmly in suppliers' hands even after the summer. Statistics show that Italy imported around 20 per cent less kraftliner from the US in the first six months of the year. Lower US capacity and limited availability have supported the implementation of higher US kraftliner prices, also in export markets. On the other hand, the paper industry's customers have continued to turn increasingly to European suppliers, supporting higher prices for European kraftliner, suppliers said.

EUWID contacts in the corrugated board industry generally confirmed that kraftliner remains in tight supply, which can pose challenges even for buyers working for integrated paper and packaging companies. However, the severity of the resulting problems varies by converter, location, end-use application and sales market. In the end, nobody was really left without supplies, said a producer of corrugated packaging for the fruit and vegetable industry.

Tighter supply of brown kraftliner has boosted demand for kraftliner substitutes, which reportedly improved order books for some companies making linerboard out of recovered fibre, such as testliner 1 and 2. Paper manufacturers attribute this to additional enquiries from Italy and the rest of Europe, but also from overseas markets. Some EUWID sources reported increased deliveries to Central and South America, where packaging manufacturers are reportedly also suffering from restricted supply of brown kraftliner from the US. However, Italian paper mills were expected to benefit from this additional overseas demand only to a limited extent. For one thing, they can supply the desired grades to only a limited degree. For another, logistics for deliveries to these countries were underdeveloped and thus expensive, paper suppliers said.

Nonetheless, paper suppliers in Italy want to use stronger overall demand for recycled corrugated case material to implement additional hikes amidst mounting costs, primarily for energy and transport. An initial price increase appeared to have taken hold in September. Market players report rises of €35-40/t for brown grades and about €30/t for white-top testliner deliveries from the start or middle of September. As September came to an end, suppliers and buyers were negotiating a second price hike for deliveries in October. As EUWID completed its research in the final week of September, the outcome of the talks remained unclear.

**Copyright notice**

The individual articles, tables and other contents published by EUWID are protected by copyright and are provided exclusively for the client's own use and the use of the client's employees. In the absence of a more extensive licence agreement, only one copy may be printed for circulation at a single business location designated by the client. Digital distribution of EUWID contents, especially by intranet or by e-mail, within a company, throughout a group of companies, or outside a company is not permitted and constitutes an infringement of copyright law. Read more in our FAQ.

Manufacturers feel that there is no way around another price correction for recycled corrugated case material in October. One producer said the recent increase in gas prices had pushed cost pressure at Italian mills to a level that was too high. Without another increase in selling prices, some mills would again have to take temporary production downtime, as they had in the past, one paper manufacturer stressed.

Customers of the paper industry acknowledged that paper mills certainly needed higher prices but argued that paper prices were rising too quickly, which was hard to pass on to customers in a weak corrugated market.

Several corrugated packaging industry insiders describe market conditions at the end of the third quarter as mixed at best and, in some cases, poor. After holiday-related production stoppages in August, the corrugated board sector entered the final four months of the year on a distinctly subdued note. One producer said current demand was insufficient to keep all plants running at satisfactory utilisation levels across every shift.

### **Cartonboard manufacturers eyeing higher prices for GC and GD**

The situation on Italy's white-lined chipboard (WLC) market became somewhat more charged again in September after a largely quiet summer month of August. The first GD board producers launched a new round of price increases starting in the second week of September. Other manufacturers followed suit over the next two weeks. Most producers have officially announced hikes of €70-80/t for deliveries from or in October.

Coming on the heels of initial talks with buyers, GD board manufacturers believe that a price increase as early as October is realistic, although they do not expect to secure the full rise immediately. Some EUWID sources on both sides of the market did not rule out the notion that implementation might be pushed back by a few weeks from the start of October to the middle or end of the month. Cartonboard mills still had a few old orders to process, while customers reportedly still had outstanding orders in their books at unchanged prices for deliveries from 1 October onwards in some cases.

Most EUWID contacts agreed that GD board prices largely stayed the same in Italy in August and September. However, views on the demand situation varied in September. While some described a typical post-summer re-start, others felt that September was much weaker. Lead times for GD were frequently listed at between two and a half and four weeks, depending on the mill in question. In customers' eyes, cartonboard mills' order books and board machine operating rates do not point to a smooth round of price talks for WLC producers.

Manufacturers are seeking to separate the debate over higher GD prices from current demand conditions in Italy. They cite the difficult cost environment as the principal driver of their price demands, with September's rise in gas prices adding further pressure. Higher transport, logistics, auxiliary material and chemical costs are also compounding matters.

#### **Copyright notice**

The individual articles, tables and other contents published by EUWID are protected by copyright and are provided exclusively for the client's own use and the use of the client's employees. In the absence of a more extensive licence agreement, only one copy may be printed for circulation at a single business location designated by the client. Digital distribution of EUWID contents, especially by intranet or by e-mail, within a company, throughout a group of companies, or outside a company is not permitted and constitutes an infringement of copyright law. Read more in our FAQ.

The first folding boxboard (FBB) manufacturers announced a new round of increases at almost the same time as their WLC counterparts. They likewise complained about higher production and logistics costs and aimed to pass as much of the additional burden as possible on to customers. Manufacturers are seeking increases ranging from €50 to €100/t, with implementation dates varying from October to early November. Depending on the supplier in question, energy surcharges already in effect in the second or third quarter are expected to be factored into, and offset against, the proposed price increases.

As EUWID researched this report in late September, market players were still reluctant to comment on the potential outcome of price talks for GC 2 in Italy. In view of the current situation on the Italian GC board market, some EUWID sources find it hard to believe that higher prices can be implemented quickly and easily. Several market participants see the manufacturers' plans to raise prices for deliveries from November as an indication that the price initiative is ultimately aimed at increasing selling prices for deliveries in the new year.

Over the summer, some GC 2 suppliers benefited from the insolvency filing by Folbb, which operated two cartonboard mills in Germany and the Netherlands, and from lengthy production and supply problems at another European supplier. This lent some support to GC 2 prices in August and September, which remained broadly stable at July levels.

Despite the capacity closures, board machines at several European mills were not consistently running at adequate rates. By late September, order backlogs ranged from three to seven weeks, depending on the producer and board mill. The GC board market is still considered oversupplied, particularly in Italy, where Asian suppliers have continued to gain market share this year.

**Copyright notice**

The individual articles, tables and other contents published by EUWID are protected by copyright and are provided exclusively for the client's own use and the use of the client's employees. In the absence of a more extensive licence agreement, only one copy may be printed for circulation at a single business location designated by the client. Digital distribution of EUWID contents, especially by intranet or by e-mail, within a company, throughout a group of companies, or outside a company is not permitted and constitutes an infringement of copyright law. Read more in our FAQ.

# Coreboard prices increase in Italy in response to rising energy costs

Demand remains subdued / Absence of one supplier slowly noticeable

 **EUWID** + 30 September 2026 | Published in issue 40/2026

**Coreboard producers in Italy succeeded in raising their sales prices in September on fairly short notice. Demand was said to be relatively weak, but cost pressure is intense. A further price step is planned for October. Cores producers were unable to react as quickly and are now aiming to raise cores prices as of October.**

After two quiet months, the beginning of September brought changes to the Italian coreboard market that some buyers described as unexpected and abrupt. During August, coreboard producers informed their customers about planned price hikes set to take effect for deliveries as early as 1 September. Some suppliers had approached their customers early on, while others acted at shorter notice, which prompted a few complaints. "After the summer shutdown, we suddenly found ourselves faced with demands for price hikes, which we were only able to discuss in concrete terms at the beginning of September," one buyer said.

In most cases, coreboard producers announced price hikes of €70-90/t for deliveries as of September. Ultimately, prices rose by €30-50, sometimes for deliveries as of 1 September and sometimes from the middle of the month. Anything more was impossible, in part because cores producers could not pass on the increases that quickly to their customers and therefore were unable to bear the additional costs, said one supplier. And the demand situation was not exactly conducive to hikes, either.

For the third quarter, the price bracket in Italy was therefore €570-630/t ex works for coreboard with a ply-bond strength of 300 J/m<sup>2</sup> and a bulk of up to 1.5 cm<sup>3</sup>/g. Since the unchanged prices in July and August are included in the third-quarter figures, the lower end of the range was stable while the upper end moved higher.

The spike in energy prices was the main reason for the flood of price increase announcements for coreboard, players said. According to Dutch TTF gas futures, the natural gas price rose from about €60/MWh at the end of July to €70 at the end of August and ultimately to more than €80/MWh in mid-September. Other cost factors, such as transports, chemicals and personnel, also played a role.

## Further price step planned for October

### Copyright notice

The individual articles, tables and other contents published by EUWID are protected by copyright and are provided exclusively for the client's own use and the use of the client's employees. In the absence of a more extensive licence agreement, only one copy may be printed for circulation at a single business location designated by the client. Digital distribution of EUWID contents, especially by intranet or by e-mail, within a company, throughout a group of companies, or outside a company is not permitted and constitutes an infringement of copyright law. Read more in our FAQ.

Nevertheless, cores producers were not entirely satisfied with the mark-ups so far, saying these were not sufficient. "We are not producing at break-even right now," said one supplier.

Producers are therefore planning a second price step in October. In their view, a further €30-40/t increase would be necessary to bring the total increase to at least €80/t. As of the second-last week of September, it was still unclear how successful they would be. However, most market respondents expect that they will not be able to achieve the full amount. Nonetheless, market players – including customers – have no doubt there will be another price increase.

Despite the increases, producers were not in a particularly good mood in September. Demand for coreboard had been weak throughout the entire quarter, they said. July and September were said to be less lively than usual and August is traditionally a quiet month anyway. Maintenance downtime also took place this year, sometimes for a bit longer than usual. Even in September, there were reportedly a few brief shutdowns in the market due to the poor order situation.

The temporary absence of one coreboard producer slowly started to become noticeable in September, but the influence was still limited, as market participants explained. The machine of coreboard producer Industria Cartaria Pieretti (ICP), which mainly makes coreboard for tissue cores, caught fire in August and will be offline for several months. Until now, the company had been able to serve customers from its existing stock volumes, several respondents said. Moreover, the company had temporarily restarted one mothballed PM at the site, which has a significantly smaller capacity. But the firm's inventories are running low and delivery volumes are expected to decrease in October, which could result in a few more orders for some competitors, EUWID was told. This could be helpful but would not solve the problem of weak demand and excess capacity in the market, commented one supplier.

### **Cores prices slated to be adjusted as of October**

Italian cores producers were very busy in September preparing their customers for a price hike to pass along the increased raw material costs as quickly as possible. In the month of September, however, prices for cores were stable. In October, suppliers want to introduce mark-ups, ideally in a single step, to cover the full increase in coreboard prices, including the second increase that is yet to come.

However, cores producers surveyed by EUWID believe it will be difficult to implement these swiftly. As in the coreboard segment, the order situation in the market for cores was described as weak. July was always a somewhat busier month due to the upcoming holiday downtime, so a few more orders came in, said one player. During August, the cores industry took long downtime of 2-3 weeks. The month of September also got off to a subdued start, respondents said. "The third quarter is ending poorly. And the start of the fourth quarter could be even worse," summarised one cores producer.

#### **Copyright notice**

The individual articles, tables and other contents published by EUWID are protected by copyright and are provided exclusively for the client's own use and the use of the client's employees. In the absence of a more extensive licence agreement, only one copy may be printed for circulation at a single business location designated by the client. Digital distribution of EUWID contents, especially by intranet or by e-mail, within a company, throughout a group of companies, or outside a company is not permitted and constitutes an infringement of copyright law. Read more in our FAQ.

| EUWID Price Watch Italy Coreboard<br>Third quarter 2026                                 |                    |                                                                    |                    |
|-----------------------------------------------------------------------------------------|--------------------|--------------------------------------------------------------------|--------------------|
| Prices in € per tonne ex works                                                          | Third quarter 2026 | Second quarter 2026                                                | Third quarter 2025 |
| Coreboard 300 J/m <sup>2</sup> , ≤ 1.5 cm <sup>3</sup> /g                               | 570 - 630          | 570 - 590                                                          | 535 - 555          |
| The price bracket reflects minimum and maximum prices reported over the entire quarter. |                    |                                                                    |                    |
| © 2026 EUWID Europäischer Wirtschaftsdienst GmbH<br>All rights reserved                 |                    | EUWID assumes no liability for the accuracy of pricing information |                    |

**Copyright notice**

The individual articles, tables and other contents published by EUWID are protected by copyright and are provided exclusively for the client's own use and the use of the client's employees. In the absence of a more extensive licence agreement, only one copy may be printed for circulation at a single business location designated by the client. Digital distribution of EUWID contents, especially by intranet or by e-mail, within a company, throughout a group of companies, or outside a company is not permitted and constitutes an infringement of copyright law. Read more in our FAQ.

# Italian paper industry calls for relief from energy costs

30 September 2026Published in issue 40/2026

**The Italian paper industry is calling for swift relief from rising energy costs. Otherwise, the country's mills risk losing competitiveness, Carlo De Iuliis, CEO of recycled corrugated case material producer Cartesar and vice-president of Italian industry association Assocarta, warned at an event in Italy's Chamber of Deputies in September.**

De Iuliis proposed, among other measures, a tax credit for companies funded by the additional VAT revenue generated by higher energy prices. On behalf of the paper industry, he also called for the immediate release of funds provided for under Italy's energy relief decree, known as DI Bollette, particularly the €1bn earmarked for gas-intensive companies. Gas from new domestic production should also be made available to businesses at an affordable price. In addition, De Iuliis called for a temporary suspension of the EU Emissions Trading System (EU ETS).

Natural gas prices in Italy rose from around €30/MWh in February 2026 to more than €80/MWh at times in September. After raw materials, gas is a paper mill's second-largest cost item and can account for 15-40 per cent of costs, depending on the mill, De Iuliis said. At current prices, mills may therefore have to reduce output or temporarily shut down.

Italian paper mills already face structurally higher energy costs than competitors in France, Spain and Germany, De Iuliis said. European producers also compete on world markets with manufacturers that do not face the same ETS costs or environmental requirements. Production cuts could also hamper the recycling of waste paper collected and recovered in Italy, he warned. If domestic mills do not process it, the recovered paper will initially remain at collection facilities. At the same time, Italy risks meeting a growing share of its paper and board demand through imports from outside the EU, potentially including products made from Italian recovered paper.

Assocarta represents Italy's paper, board and pulp industry. According to the association, the sector comprised 114 companies operating 151 mills and employing 18,700 people in 2025. Paper and board production totalled 7.8 million t in 2025, down 2 per cent from the previous year, while industry turnover fell 5 per cent to €7.9bn.



*Industry associations across Europe complain that natural gas prices have more than doubled since the start of the year.  
(Illustrative photo)*

## Copyright notice

The individual articles, tables and other contents published by EUWID are protected by copyright and are provided exclusively for the client's own use and the use of the client's employees. In the absence of a more extensive licence agreement, only one copy may be printed for circulation at a single business location designated by the client. Digital distribution of EUWID contents, especially by intranet or by e-mail, within a company, throughout a group of companies, or outside a company is not permitted and constitutes an infringement of copyright law. Read more in our FAQ.

# Waste shipments: Commission publishes draft of new “country list” of non-OECD states

## Major importers of recovered paper included

🔗 **EUWID +** 30 September 2026 | Published in issue 40/2026

From 21 May 2027, the EU will prohibit exports of non-hazardous waste for recovery to non-OECD countries unless the destination country has been authorised to receive the waste stream concerned. The European Commission has published a draft of the new “country list” setting out these authorisations on 18 September and is seeking comments by 16 October. The call for feedback and the draft can be accessed on its website via [link.euwid.de/7fki2](https://link.euwid.de/7fki2).

The Commission aims to adopt the final list before the end of the year. The list is then to be updated at least every two years.

Non-OECD countries seeking to continue receiving waste from the EU had to apply to the Commission, specifying the waste streams they wished to import. They were also required to provide extensive evidence that the waste would be recovered in an environmentally sound manner. The Commission reports that it received applications from 32 countries and assessed them both at country level and for each individual waste stream. The results of this assessment form the basis of the draft list.

The rules are intended to prevent waste exported from the EU from causing harm to human health or the environment in third countries. They were introduced as part of the 2024 revision of the EU Waste Shipments Regulation (WSR).

According to a Commission staff working document, five countries had their applications rejected in full after failing to provide sufficient evidence that the waste streams they sought to import would be managed in an environmentally sound manner. The countries concerned are El Salvador, Kazakhstan, Laos, Nigeria and Togo. Singapore’s request, which covered only lithium-ion batteries, was also rejected. Lithium-based batteries are classified as hazardous waste, which cannot be exported from the EU to non-OECD countries. The People’s Republic of China did not request inclusion in the country list. Hong Kong had applied only to import metal waste for treatment at a single facility and this application was rejected.

The European Commission’s assessment focused especially closely on ferrous and non-ferrous metal waste. Under the draft, only a handful of smaller importing countries are set to receive the requested authorisation to import these waste categories from the EU.

### Copyright notice

The individual articles, tables and other contents published by EUWID are protected by copyright and are provided exclusively for the client's own use and the use of the client's employees. In the absence of a more extensive licence agreement, only one copy may be printed for circulation at a single business location designated by the client. Digital distribution of EUWID contents, especially by intranet or by e-mail, within a company, throughout a group of companies, or outside a company is not permitted and constitutes an infringement of copyright law. Read more in our FAQ.

### **Commission plans to include major recovered paper export markets**

By contrast, the Commission's draft list includes many of the EU's major export markets for recovered paper. Most of these countries would allow shipments under the green-list procedure without prior notification and consent and with only the Annex VII form required in addition to the usual transport documents.

However, destination countries can require shipments to be subject to prior notification and consent, and Oman, Pakistan, Saudi Arabia and Thailand have opted to do so, according to the draft.

The other countries are Bangladesh, Bosnia and Herzegovina, Egypt, Georgia, India, Indonesia, Malaysia, Mauritius, Moldova, North Macedonia, the Philippines, Serbia, Taiwan, Tunisia, Ukraine and Vietnam. Some have further specified the types of B3020 recovered paper they will accept by reference to HS codes or entries from the EU List of Waste. The draft would also permit exports of B3027 waste from self-adhesive labels to India and Sri Lanka.

India had also requested authorisation to receive residue-free composite packaging consisting mainly of paper and plastic (BEU04) and waste from the pre-treatment of composite packaging (B3026) from the EU. The Commission's accompanying staff working document recommends against authorising these waste streams, citing the ban on plastic waste exports to non-OECD countries that will apply from 21 November and remain in place for at least two and a half years.

### **Commission seeks to prevent re-exports to unauthorised countries**

The European Commission also stipulates in the draft that waste may only be shipped to countries on the list if it is destined for an authorised recovery facility. Waste may not be exported for an interim recovery operation, unless all subsequent recovery operations take place in the same destination country or in another country authorised to receive the waste in question.

The Commission says that it will closely monitor compliance with these provisions. In particular, it aims to minimise the risk that waste exported to a country authorised to receive waste from the EU is subsequently shipped to a country that is not authorised to receive it.

EU member states should also take the necessary measures to ensure that waste is not exported as non-waste in order to circumvent the WSR. The European Commission says it may also consider separate measures relating to exports of waste or end-of-waste materials "to address global imbalances, secure the supply of secondary materials and maintain the competitiveness of EU industry".

#### **Copyright notice**

The individual articles, tables and other contents published by EUWID are protected by copyright and are provided exclusively for the client's own use and the use of the client's employees. In the absence of a more extensive licence agreement, only one copy may be printed for circulation at a single business location designated by the client. Digital distribution of EUWID contents, especially by intranet or by e-mail, within a company, throughout a group of companies, or outside a company is not permitted and constitutes an infringement of copyright law. Read more in our FAQ.

# Strong export demand pushes UK recovered paper prices higher

New UK containerboard capacity could reduce dependence on export markets

 **EUWID** + 30 September 2026 | Published in issue 40/2026

Strong demand on export markets and persistently low collection volumes pushed up prices for old corrugated containers (OCC; 1.05) in September. The upward trend is expected to continue into early October. Activity picked up after the end of the summer holidays, but the usual seasonal improvement in collection volumes fell short of expectations, market participants told EUWID.

At the same time, export demand was brisk. Asian paper producers in particular were said to be stepping up purchases ahead of the year-end “blackout” period, when shipping activity and, in some cases, production typically slows. European producers were also reported to be preparing for the Christmas season, while very strong demand was seen from Turkey.

Prices for grade 1.05 in exports to India and the Far East rose by up to £10/t over the course of the month. Towards the end of September, a few scattered deals were reported at even higher levels. Market participants therefore believe prices could approach £130/t in early October.

Prices also increased in the UK and continental Europe, although less sharply than in exports to Asia. Gains were generally in the high single-digit range. Even so, the upper end of the domestic and European price bracket remained only slightly below levels achieved in Far East business.

High prices for grade 1.05 prompted more buyers in the UK and continental Europe to switch to mixed paper (1.02). This did not, however, generate any significant upward momentum in that market segment. Sources described supply and demand as balanced, with prices unchanged from August.

Kraft-containing grades also gained ground, mainly on the back of strong demand from Turkey. Demand in Europe was also reasonably good, but the prices achievable there were often not attractive enough for UK sellers.

| EUWID Price Watch Recovered Paper UK                                                                                                                                                                                                        |               |                |                                                                     |               |
|---------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|---------------|----------------|---------------------------------------------------------------------|---------------|
| September 2026                                                                                                                                                                                                                              |               |                |                                                                     |               |
| Prices in £ per tonne                                                                                                                                                                                                                       | Sep 2026<br>£ | Sep 2026<br>€* | Aug 2026<br>£                                                       | Sep 2025<br>£ |
| Mixed paper and board (1.02)                                                                                                                                                                                                                | 57 - 70       | 66 - 81        | 57 - 70                                                             | 50 - 70       |
| Mixed paper and board (1.02), export                                                                                                                                                                                                        | 60 - 74       | 70 - 86        | 60 - 74                                                             | 55 - 78       |
| Old corrugated containers (1.05)                                                                                                                                                                                                            | 108 - 118     | 125 - 137      | 100 - 112                                                           | 90 - 102      |
| Old corrugated containers (1.05), export                                                                                                                                                                                                    | 114 - 121     | 132 - 140      | 105 - 116                                                           | 93 - 105      |
| Magazines (1.06) <sup>1)</sup>                                                                                                                                                                                                              | 95 - 130      | 110 - 151      | 95 - 130                                                            | 90 - 125      |
| Sorted graphic paper for deinking (1.11) <sup>1)</sup>                                                                                                                                                                                      | 85 - 100      | 99 - 116       | 85 - 100                                                            | 80 - 100      |
| Newspapers (2.01) <sup>1)</sup>                                                                                                                                                                                                             | 95 - 120      | 110 - 139      | 95 - 120                                                            | 95 - 115      |
| Sorted office paper (2.05)                                                                                                                                                                                                                  | 140 - 145     | 162 - 168      | 135 - 143                                                           | 145 - 157     |
| White woodfree letters (3.05) <sup>2)</sup>                                                                                                                                                                                                 | 255 - 270     | 296 - 313      | 255 - 270                                                           | -             |
| Multigrade                                                                                                                                                                                                                                  | 145 - 155     | 168 - 180      | 140 - 153                                                           | 160 - 170     |
| White newsprint (3.14)                                                                                                                                                                                                                      | 200 - 230     | 232 - 267      | 190 - 220                                                           | 175 - 205     |
| White woodfree uncoated shavings (3.18.01)                                                                                                                                                                                                  | 285 - 345     | 331 - 400      | 285 - 345                                                           | 330 - 375     |
| * Exchange rate as of 25 September 2026: £1 = €1.16<br><sup>1)</sup> includes exports and non-paper applications<br><sup>2)</sup> From January 2026 onwards, the grade White woodfree letters (3.05) will be additionally covered by EUWID. |               |                |                                                                     |               |
| © 2026 EUWID Europäischer Wirtschaftsdienst GmbH<br>All rights reserved                                                                                                                                                                     |               |                | EUWID assumes no liability for the accuracy of pricing information. |               |

## Copyright notice

The individual articles, tables and other contents published by EUWID are protected by copyright and are provided exclusively for the client's own use and the use of the client's employees. In the absence of a more extensive licence agreement, only one copy may be printed for circulation at a single business location designated by the client. Digital distribution of EUWID contents, especially by intranet or by e-mail, within a company, throughout a group of companies, or outside a company is not permitted and constitutes an infringement of copyright law. Read more in our FAQ.

## Higher freight rates could curb upward trend

Freight rates and limited shipping capacity remained key issues for the UK recovered paper market in September. Alongside higher road haulage costs linked to diesel prices, further increases were announced for container shipments to Asia. Market participants also reported shortages of available freight space.

Some recyclers said their yards were full even though the material had already been sold, as shipping lines had failed to collect containers as scheduled in a number of cases. One explanation given was that high freight rates for westbound cargo from Asia currently make it more attractive for shipping companies to return empty containers to Asia as quickly as possible. However, not all respondents in the market reported seeing this behaviour. Some of them expect sea container rates to rise by as much as \$300 per container from October. Higher freight costs would typically put pressure on ex-works prices for UK recovered paper and could therefore curb the current upward trend. Other sources pointed out that similar concerns had been raised several times this year without the expected cost increases materialising.

## Deinking grades stable, woodfree grades somewhat firmer

Deinking grades remained in good demand in September. Purchasing by domestic buyers remained strong, sources said, while prices were largely unchanged. At the same time, many suppliers are looking for alternative outlets and are currently conducting trials with customers outside the graphic paper industry. Newspapers (2.01), for example, could also be suitable for tissue production. Particularly clean qualities may also find applications outside the paper industry.

Prices for woodfree grades used in tissue production continued to trend upwards, although the increase was more modest than initially expected. One producer with new recovered paper processing capacity apparently bought less recovered paper than anticipated. Technical problems at some mills and shifts in larger supply contracts were also reported to have changed demand at individual sites.

Prices for multigrade and sorted office paper (2.05), were unchanged to £5/t higher. Prices for white woodfree letters (3.05) remained at August levels. Demand for high-white grades were somewhat firmer, particularly in continental Europe, with prices stable to slightly higher.

## PERN rules create uncertainty towards year-end

There continues to be considerable discussion around the PRN/PERN system. PERNs (Packaging (Export) Recovery Notes) are tradable recycling certificates issued by accredited exporters for packaging waste exported for recycling, providing them with an additional source of revenue.

### Copyright notice

The individual articles, tables and other contents published by EUWID are protected by copyright and are provided exclusively for the client's own use and the use of the client's employees. In the absence of a more extensive licence agreement, only one copy may be printed for circulation at a single business location designated by the client. Digital distribution of EUWID contents, especially by intranet or by e-mail, within a company, throughout a group of companies, or outside a company is not permitted and constitutes an infringement of copyright law. Read more in our FAQ.

Under a rule change introduced at the start of 2026, PERNs can no longer be issued when material is dispatched but only once it has been received at the accredited overseas recycling site. Market players said the resulting delay could mean that some 1.05 volumes shipped towards the end of the year may arrive too late to qualify for PERNs. This could affect consignments leaving the UK in 2026 but arriving at their destination only in 2027.

With PERNs currently worth around £8/t, losing this revenue could reduce prices for the affected volumes by a similar amount. Against this backdrop, some market participants also welcomed plans for additional UK containerboard capacity. A stronger domestic production base could reduce the UK recovered paper market's dependence on export markets and, in turn, on political decisions, geopolitical developments and logistics conditions outside the UK.

| UK recovered paper exports |                  |                  |               |
|----------------------------|------------------|------------------|---------------|
| tonnes                     | January - June   |                  | %<br>Change   |
|                            | 2026             | 2025             |               |
| <b>Total EU 27</b>         | <b>321,965</b>   | <b>451,194</b>   | <b>- 28.6</b> |
| France                     | 52,559           | 78,114           | - 32.7        |
| Germany                    | 90,648           | 134,379          | - 32.5        |
| Netherlands                | 108,252          | 154,129          | - 29.8        |
| <b>Total other Europe</b>  | <b>203,495</b>   | <b>217,215</b>   | <b>- 6.3</b>  |
| Turkey                     | 203,083          | 216,797          | - 6.3         |
| <b>Total Asia</b>          | <b>1,618,660</b> | <b>1,282,752</b> | <b>+ 26.2</b> |
| China                      | 428              | 835              | - 48.7        |
| India                      | 805,965          | 633,333          | + 27.3        |
| Indonesia                  | 222,848          | 106,693          | + 108.9       |
| Malaysia                   | 310,996          | 249,074          | + 24.9        |
| Thailand                   | 87,961           | 96,843           | - 9.2         |
| Vietnam                    | 169,801          | 180,625          | - 6.0         |
| <b>Total South America</b> | <b>228</b>       | <b>120</b>       | <b>+ 89.5</b> |
| <b>Total Exports</b>       | <b>2,146,069</b> | <b>1,951,829</b> | <b>+ 10.0</b> |
| Source: CPI                |                  |                  |               |

#### Copyright notice

The individual articles, tables and other contents published by EUWID are protected by copyright and are provided exclusively for the client's own use and the use of the client's employees. In the absence of a more extensive licence agreement, only one copy may be printed for circulation at a single business location designated by the client. Digital distribution of EUWID contents, especially by intranet or by e-mail, within a company, throughout a group of companies, or outside a company is not permitted and constitutes an infringement of copyright law. Read more in our FAQ.

# Recovered paper prices in Italy stable with slight upward pressure for OCC

Persistently weak demand for mixed paper and board

 30 September 2026 | Published in issue 40/2026

**The Italian market for recovered paper got off to a stable start in September. Following numerous maintenance downtimes in the paper and board industry over the summer, domestic demand for ordinary recovered paper grades was lower, but exports to Asia offset the downturn. Prices were mostly stable with only slight upward pressure for old corrugated containers (OCC) in isolated cases. No changes were reported in the market for deinking grades. Stable prices were likewise reported for higher recovered paper grades, although a few waste management firms reported somewhat weaker demand.**

| EUWID Price Watch Recovered Paper Italy                                 |           |           |                                                                     |           |
|-------------------------------------------------------------------------|-----------|-----------|---------------------------------------------------------------------|-----------|
| September 2026                                                          |           |           |                                                                     |           |
| Prices in € per tonne                                                   | Sep 2026  | Aug 2026  | July 2026                                                           | Sep 2025  |
| Mixed paper and board (1.02)                                            | 80 - 90   | 80 - 90   | 80 - 90                                                             | 85 - 100  |
| Supermarket corrugated paper and board (1.04)                           | 85 - 95   | 85 - 95   | 85 - 95                                                             | 90 - 100  |
| Old corrugated containers (1.05)                                        | 95 - 105  | 95 - 105  | 95 - 105                                                            | 95 - 110  |
| New shavings of corrugated board (4.01)                                 | 110 - 120 | 110 - 120 | 110 - 120                                                           | 110 - 125 |
| Magazines (1.06)                                                        | 110 - 125 | 110 - 125 | 105 - 125                                                           | 130 - 140 |
| Newspapers (2.01)                                                       | 150 - 165 | 150 - 165 | 150 - 165                                                           | 165 - 185 |
| White woodfree letters (3.05)                                           | 285 - 305 | 285 - 305 | 285 - 305                                                           | 310 - 330 |
| White newsprint (3.14)                                                  | 290 - 305 | 290 - 305 | 290 - 305                                                           | 300 - 335 |
| White woodfree shavings (3.18)                                          | 395 - 420 | 395 - 420 | 395 - 420                                                           | 425 - 455 |
| Prices ex works, material sorted and in bales                           |           |           |                                                                     |           |
| © 2026 EUWID Europäischer Wirtschaftsdienst GmbH<br>All rights reserved |           |           | EUWID assumes no liability for the accuracy of pricing information. |           |

Following maintenance downtime taken in August, Italy's corrugated case material, cartonboard and coreboard mills resumed to regular production in September. But since deliveries of recovered paper from the Comieco consortium had continued while machines were idled over the summer, many mills had high inventory levels of ordinary grades, especially at the beginning of the month. They were therefore buying less recovered paper than usual this month, market participants explained. In addition, there were still a few smaller shutdowns at paper and board mills in September.

Suppliers said that weaker demand on the domestic market could be offset by exports to Asia, at least for OCC. Some of them showed a strong preference for the export market in September, where demand and prices were said to be good. Consequently, volumes were not typically accumulating at sorting facilities.

Prices for old corrugated containers (1.05) were thus stable in September. In a few instances, suppliers who had good export options were able to gain a few extra euros from some Italian customers who urgently needed material. But as a rule, buyers had sufficient inventories of recovered paper to resist price increases. One customer said she simply did not buy from suppliers who were asking higher prices. Overall, supply was sufficient and sourcing material was not a problem, customers said.

## Copyright notice

The individual articles, tables and other contents published by EUWID are protected by copyright and are provided exclusively for the client's own use and the use of the client's employees. In the absence of a more extensive licence agreement, only one copy may be printed for circulation at a single business location designated by the client. Digital distribution of EUWID contents, especially by intranet or by e-mail, within a company, throughout a group of companies, or outside a company is not permitted and constitutes an infringement of copyright law. Read more in our FAQ.

It was a different situation for mixed paper and board (1.02). Here, supply was reportedly still abundant in September. Demand has been weak for some time and this grade is not exported to Asia nearly as much, EUWID was told. After downtime in the summer, off-takers also had high inventory levels in September. In addition, one coreboard producer has had to halt operations after a major fire, meaning there will now be one fewer customer for mixed paper for several months. Waste management firms therefore reported difficulties selling this grade. Prices for mixed paper were nevertheless unchanged in September.

### **Some upward adjustments for export prices**

In September, suppliers in Italy said they were satisfied with OCC export business. Demand was described as normal and good, while prices were attractive. Some players slightly increased their export volumes, while others shipped their usual quantities.

When it came to prices, some players reported stable export prices, while others reported smallish increases of up to €5/t. The lowest prices from August generally disappeared but the upper end of the bracket often remained unchanged. In September, Asian buyers were usually paying €110-115/t ex works for OCC. In scattered instances, ex-works prices could reach €120/t where transport distances to the port were short.

Some insiders saw indications that prices in the export market could increase in the coming weeks. Others believe it is too early to tell. If prices do rise, some market players see a chance that prices for OCC in Italy could also edge slightly higher in October. Other respondents, though, expect prices for this grade to remain stable. Demand from domestic mills is not that robust and customers are already facing major cost burdens, EUWID was told. "We will try to keep prices steady as long as possible," commented one customer. Due to the weak demand for mixed paper, no price increases are expected here in October.

In the market for deinking grades, everything ticked along normally in September. Market participants said demand was stable. Buyers from Germany and France were purchasing magazines (1.06) as usual, noted one supplier. Prices were untouched. As is typically the case, newspapers (2.01) were sold not only to European paper mills, but also to customers in Asia or in the insulation sector. Here, too, the market was unchanged with prices steady compared with August.

For the higher grades, some waste management firms felt that demand from the tissue industry was somewhat lower, although not all market participants reported this. Generally, however, it remains difficult to move these volumes. Some suppliers have limited volumes, which they sell to their regular customers. Here business continued as usual. In September, prices for white woodfree letters (3.05), white newsprint (3.14) and white woodfree shavings (3.18) were stable.

#### **Copyright notice**

The individual articles, tables and other contents published by EUWID are protected by copyright and are provided exclusively for the client's own use and the use of the client's employees. In the absence of a more extensive licence agreement, only one copy may be printed for circulation at a single business location designated by the client. Digital distribution of EUWID contents, especially by intranet or by e-mail, within a company, throughout a group of companies, or outside a company is not permitted and constitutes an infringement of copyright law. Read more in our FAQ.

# Recovered paper prices in France hold steady

## Growing gap between domestic and export prices for ordinary grades

 **EUWID +** 30 September 2026 | Published in issue 40/2026

**Following the mark-downs in August, French prices for ordinary recovered paper (RCP) grades were stable in September. By contrast, export prices ticked slightly higher, widening the gap with domestic price levels. Prices in France also lagged those in other European countries. For deinking and higher RCP grades, market conditions were broadly unchanged and prices were flat.**

| EUWID Price Watch Recovered Paper France<br>September 2026              |           |           |                                                                     |           |
|-------------------------------------------------------------------------|-----------|-----------|---------------------------------------------------------------------|-----------|
| Prices in € per tonne                                                   | Sep 2026  | Aug 2026  | July 2026                                                           | Sep 2025  |
| Mixed paper and board (1.02)                                            | 25 - 35   | 25 - 35   | 35 - 45                                                             | 25 - 35   |
| Supermarket corrugated paper and board (1.04)                           | 60 - 70   | 60 - 70   | 70 - 80                                                             | 70 - 80   |
| Old corrugated containers (1.05)                                        | 80 - 90   | 80 - 90   | 90 - 100                                                            | 90 - 100  |
| Sorted graphic paper for deinking (1.11)                                | 95 - 105  | 95 - 105  | 95 - 105                                                            | 95 - 105  |
| Intra-Europe exports from France (1.11)                                 | 95 - 105  | 95 - 105  | 85 - 105                                                            | 100 - 115 |
| Coloured letters (2.06)                                                 | 135 - 145 | 135 - 145 | 135 - 145                                                           | 165 - 180 |
| 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.           |           |           |                                                                     |           |
| © 2026 EUWID Europäischer Wirtschaftsdienst GmbH<br>All rights reserved |           |           | EUWID assumes no liability for the accuracy of pricing information. |           |

At the moment, mixed paper and board (1.02), supermarket paper and board (1.04) and old corrugated containers (OCC, 1.05) are relatively cheap in France compared with other European countries such as Germany or Italy. While prices declined on the French market in August, other markets did not make the same adjustment. Some insiders had expected price levels elsewhere in Europe to fall in line with the French market in September, but this has not happened, so the price gap remains. Moreover, the gap between domestic and Far East export prices widened.

Despite this, prices of ordinary grades on the French market were stable in September and did not move any higher. Although suppliers stress that collection volumes are low and demand from Asia was good, it appears there was enough material on hand to meet customers' demand.

A few market participants explained that demand from French paper mills had not yet quite returned to normal levels after August, which is typically quieter due to the summer holidays. And producers confirmed that a few mills had taken their annual maintenance downtimes in September. In addition, mills that had halted production in August had high RCP inventories at the beginning of September. Other mills still had maintenance shutdowns ahead of them, and had therefore trimmed their purchasing volumes in anticipation.

Overall, though, suppliers said they were satisfied with demand for ordinary recovered paper grades. If domestic outlets could not be found, Asian buyers were willing to step in, they said. German buyers were also reportedly showing interest in the lower-priced French material. Consequently, supply and demand were broadly balanced and the suppliers said they were not seeing any stock build up at their collection centres.

### Copyright notice

The individual articles, tables and other contents published by EUWID are protected by copyright and are provided exclusively for the client's own use and the use of the client's employees. In the absence of a more extensive licence agreement, only one copy may be printed for circulation at a single business location designated by the client. Digital distribution of EUWID contents, especially by intranet or by e-mail, within a company, throughout a group of companies, or outside a company is not permitted and constitutes an infringement of copyright law. Read more in our FAQ.

## Upward price step expected in October

Nevertheless, most market participants surveyed believe that the relatively wide gap between French prices and those on the export market and elsewhere in Europe cannot be maintained for long. While OCC on the Far East export market was fetching up to €115 and sometimes as much as €120/t ex works, the price for this grade in France was generally up to €90 in September.

Most respondents told EUWID that they expect an upward price adjustment in October on the French market. Buyers would need to raise their prices to keep volumes in France, they said. The price increase achieved for corrugated case material could give producers enough leeway to make such an adjustment, EUWID was told.

In September, exporters were seeing good demand from Asia for OCC. Turkish buyers had recently also shown greater interest, they said. The suppliers surveyed said they had increased their export volumes slightly, also because prices were attractive. Export prices rose by a few euros compared with August.

Stable prices were reported in September for sorted graphic paper for deinking (1.11). Demand for this grade eased slightly in France, but insiders expected it to pick up again once customers had worked through the RCP stocks they had built up over the summer. Prices on the French market, which had risen as recently as July, did not change.

Suppliers said they were satisfied with demand for sorted graphic paper for deinking from neighbouring countries. Business was proceeding as usual, they said. In most cases, export prices for this grade were also stable, although some respondents noted slight upward price pressure.

## Good demand for coloured letters

For a while now, waste management firms in France have expressed satisfaction with the coloured letters (2.06) business. Demand in September was described as steady and good. The tissue industry was buying its usual volumes and material was also flowing towards Asia. A few suppliers believe that price mark-ups might be possible in this segment in the near future.

Demand for multi printing (3.10) was stable but less satisfactory for suppliers. Business is said to be ticking over as usual: Volumes sold were limited, but collection volumes are also weak and all of the material that comes in can be sold, explained one respondent. The market was thus balanced and prices for this grade were unchanged.

Demand for white woodfree uncoated shavings (3.18.01) was said to be modest. It was not easy to find off-takers, suppliers reported yet again this month. On the whole, however, there was very limited supply, so the market was in equilibrium and prices remained stable.

### Copyright notice

The individual articles, tables and other contents published by EUWID are protected by copyright and are provided exclusively for the client's own use and the use of the client's employees. In the absence of a more extensive licence agreement, only one copy may be printed for circulation at a single business location designated by the client. Digital distribution of EUWID contents, especially by intranet or by e-mail, within a company, throughout a group of companies, or outside a company is not permitted and constitutes an infringement of copyright law. Read more in our FAQ.

# Varying price trends for brown and white sack kraft paper in Q3 2026

## Paper mills present new cost-driven demands for October

🔗 **EUWID +** 30 September 2026 | [Published in issue 40/2026](#)

**In the European markets for sack kraft paper, producers of paper sacks are being confronted with further price hikes. Prices for brown and white paper grades already rose in the second quarter of 2026, and the upward price trend continued into July. Paper mills are coming under mounting cost-side pressure, so they have now announced another round of hikes as of October.**

Despite the upward price trend, demand is anything but dynamic, say industry insiders. Producers of paper sacks surveyed by EUWID at the end of September said in most cases that activity levels in the third quarter could be better. Moreover, with the cold-weather season on the horizon, industry insiders anticipate the typical seasonal slowdown, especially for sacks in the cement/building materials segment.

Packaging producers say demand right now is relatively stable at a subdued level. But there is no impetus to drive a market-wide rebound, experts say. This is true not only for Germany but also all of Europe, though there are some regional nuances. In general, business in countries such as Italy and Poland is somewhat better. Insiders say, however, that demand in Italy – which is the largest market for paper sacks in Europe, ahead of Germany – is also not satisfactory. Overall, demand for sacks in the food and animal feed segments is said to be relatively steady. The chemical industry still lacks momentum, EUWID was told.

The subdued market development is also reflected in the reports from paper industry sources. Producers told EUWID that bookings were relatively good on the machines making sack kraft paper. But for the brown grades, market participants attribute this mainly to demand from the e-commerce segment, and less to orders from the paper sack industry. Other paper mills described the market as “decent” at best during the late September market survey.

### Paper mills cite cost pressure to justify new mark-ups

Meanwhile, paper mills are concerned about rising cost pressure. Logistics and energy prices, in particular, are squeezing profit margins, they say. Moreover, wood prices have increased markedly. This trend is more apparent in Central Europe than in Scandinavia, for example. Market experts therefore say the latest price hikes for sack kraft paper are primarily cost-driven.

#### Copyright notice

The individual articles, tables and other contents published by EUWID are protected by copyright and are provided exclusively for the client's own use and the use of the client's employees. In the absence of a more extensive licence agreement, only one copy may be printed for circulation at a single business location designated by the client. Digital distribution of EUWID contents, especially by intranet or by e-mail, within a company, throughout a group of companies, or outside a company is not permitted and constitutes an infringement of copyright law. Read more in our FAQ.

For the third quarter, players from Germany and Central Europe report a new round of increases. For brown sack kraft paper, these were usually within a range of €30-50/t, while insiders mentioned a hike of €40-50/t for white grades.

However, not all respondents confirm this movement: Numerous players say prices were unchanged in the third quarter in southern Europe and Italy, especially for white paper. The size of the implemented mark-ups was determined by the previous price level and was dependent on, among other things, individual agreements in the second quarter, insiders explained.

One producer of paper sacks told EUWID he had also received new price hike announcements for the fourth quarter, which he described as an unusual development. Business towards the end of the year is traditionally weaker, primarily due to the slowdown in construction activity, insiders say. The paper mills are said to be targeting increases of around 8-12 per cent, according to unanimous reports.

Sack producers describe the moves by paper producers as “dramatic measures,” and say they doubt they can pass on further cost increases via higher packaging prices. Given the price steps that had already been implemented this year, it was questionable how much more the market could take, stressed one buyer. At the time of the EUWID market survey, negotiations were underway to determine the conditions for deliveries as of October.

| EUWID Price Watch Europe Sack Kraft Paper                               |                    |                                                                     |                    |
|-------------------------------------------------------------------------|--------------------|---------------------------------------------------------------------|--------------------|
| Third quarter 2026                                                      |                    |                                                                     |                    |
| Prices in € per tonne                                                   | Third quarter 2026 | Second quarter 2026                                                 | Third quarter 2025 |
| Sack kraft paper, brown, 70- 90 g, semi-extensible                      | 910 - 1,100        | 910 - 1,050                                                         | 890 - 1,080        |
| Sack kraft paper, white, 70-90 g, semi-extensible                       | 1,230 - 1,420      | 1,230 - 1,370                                                       | 1,190 - 1,400      |
| © 2026 EUWID Europäischer Wirtschaftsdienst GmbH<br>All rights reserved |                    | EUWID assumes no liability for the accuracy of pricing information. |                    |

#### Copyright notice

The individual articles, tables and other contents published by EUWID are protected by copyright and are provided exclusively for the client's own use and the use of the client's employees. In the absence of a more extensive licence agreement, only one copy may be printed for circulation at a single business location designated by the client. Digital distribution of EUWID contents, especially by intranet or by e-mail, within a company, throughout a group of companies, or outside a company is not permitted and constitutes an infringement of copyright law. Read more in our FAQ.

# Prices rise for woodfree envelope paper in third quarter of 2026 – but not in all cases

## Increases announced for brown shipping bag paper as of October

🔗 **EUWID +** 30 September 2026 | Published in issue 40/2026

**Demand in the German market for envelope and shipping bag paper continued to soften in the third quarter of 2026. The summer months are traditionally weaker, especially in the envelope industry, but many EUWID respondents believe this year's volume decline exceeds the industry's long-term structural contraction. The demand trend in the eCommerce packaging sector, where industry insiders see growth potential, is more positive.**

Players in Germany's envelope industry surveyed in late September described the third quarter as a weak one. Market participants told EUWID that in some cases the ongoing demand downtrend had become a real "erosion of volumes." Others said utilisation rates of production capacities for envelopes and shipping bags were exceptionally low. The seasonal slowdown in demand was expected in the summer months, but this year's drop-off was starker than usual, respondents said.

Market insiders say that one driving factor here is Germany's legislation making electronic invoicing mandatory, which is having an increasingly noticeable effect on demand for envelopes. Consequently, envelope factories are often having problems with capacity utilisation. Only a handful of industry respondents describe their activity levels as good considering the current market circumstances. Market contacts also mentioned shrinking demand for brown shipping bags, though the downturn was not as pronounced as for classic envelopes.

### **Rising cost pressure coincides with weak utilisation at paper mills**

Players in the paper industry also report sluggish demand. Order intake, especially for woodfree white envelope paper, had been subdued recently, paper mills confirmed to EUWID. By contrast, the recycled envelope paper segment is seeing somewhat better utilisation and generally longer delivery times. Respondents in the market attributed this to knock-on effects from the insolvency of Papierfabrik Hainsberg and the resulting shrinking pool of suppliers.

Looking ahead to the fourth quarter, there was no sign yet of any upturn, said players surveyed in the last full week of September. As one sceptical paper producer put it: "Where would that come from?" Simultaneously, paper producers are facing growing cost pressure, especially due to higher prices for energy and logistics.

#### **Copyright notice**

The individual articles, tables and other contents published by EUWID are protected by copyright and are provided exclusively for the client's own use and the use of the client's employees. In the absence of a more extensive licence agreement, only one copy may be printed for circulation at a single business location designated by the client. Digital distribution of EUWID contents, especially by intranet or by e-mail, within a company, throughout a group of companies, or outside a company is not permitted and constitutes an infringement of copyright law. Read more in our FAQ.

### **Mixed pricing developments for white woodfree envelope paper**

Mixed price trends were seen for envelope paper in Germany during the third quarter of 2026 which is reportedly having effects on the negotiations currently underway for the fourth quarter of the year. This primarily applies to white woodfree grades. A few – albeit not all – paper mills have announced cost-driven price increases as of October. However, it appears that implementation depends on how prices developed in the third quarter in each individual case.

EUWID respondents from both the customer and paper industry sides confirm that price increases averaging €30/t were implemented as of July in some cases for woodfree white grades. In these instances, respondents agreed that suppliers would not be pursuing any further demands as of October. However, other producers who reportedly had stable prices in the third quarter are now planning renewed price steps as of October.

For recycled envelope paper, EUWID respondents also did not see any widespread price movement in the market during the period from July until the end of September. This was also true for brown shipping bag paper VP4, for which there are also occasional announcements of hikes as of October.

For shipping bag kraft paper VKP3, players throughout the supply chain did not observe any market-wide price changes during the third quarter, after slight increases took effect at the start of the year. Market insiders said that paper mills had sometimes pursued mark-ups as of July, but were unable to implement these on a widespread basis. Buyers report that they are now discussing such steps as of October.

## **Note to readers:**

### **Price reporting to end for recycled envelope paper in Germany**

In order to reflect changes in the market EUWID will discontinue price reporting for 80 g recycled envelope paper Germany. The final price survey for 80 g recycled envelope paper will be published in the EUWID Price Watch for the third quarter of 2026.

#### **Copyright notice**

The individual articles, tables and other contents published by EUWID are protected by copyright and are provided exclusively for the client's own use and the use of the client's employees. In the absence of a more extensive licence agreement, only one copy may be printed for circulation at a single business location designated by the client. Digital distribution of EUWID contents, especially by intranet or by e-mail, within a company, throughout a group of companies, or outside a company is not permitted and constitutes an infringement of copyright law. Read more in our FAQ.

**EUWID Price Watch Germany Envelope and Shipping Bag Paper**

Third quarter 2026

| Prices in € per tonne               | Third quarter 2026 | Second quarter 2026 | Third quarter 2025 |
|-------------------------------------|--------------------|---------------------|--------------------|
| White woodfree envelope paper, 80 g | 1,730 - 2,020      | 1,730 - 1,990       | 1,750 - 1,990      |
| Recycled envelope paper, 80 g       | 1,320 - 1,470      | 1,320 - 1,470       | 1,320 - 1,470      |
| Shipping bag paper VKP 3            | 1,330 - 1,480      | 1,330 - 1,480       | 1,350 - 1,500      |
| Shipping bag paper VP 4             | 1,290 - 1,450      | 1,290 - 1,450       | 1,300 - 1,450      |

© 2026 EUWID Europäischer Wirtschaftsdienst GmbH  
All rights reserved

EUWID assumes no liability for the accuracy of pricing information,

**Copyright notice**

The individual articles, tables and other contents published by EUWID are protected by copyright and are provided exclusively for the client's own use and the use of the client's employees. In the absence of a more extensive licence agreement, only one copy may be printed for circulation at a single business location designated by the client. Digital distribution of EUWID contents, especially by intranet or by e-mail, within a company, throughout a group of companies, or outside a company is not permitted and constitutes an infringement of copyright law. Read more in our FAQ.

# Kraftliner price increase is not being implemented in full in Germany

## Tense situation facing newsprint producers and printers

🔗 **EUWID +** 30 September 2026 | Published in issue 40/2026

**Negotiations about newsprint prices in Germany have entered a critical phase. Many buyers are pretty unhappy with the price increases sought by paper mills. Producers point to recent developments in both supply and costs, saying that their goal is to safeguard production and make business profitable.**

Another price hike has been implemented for brown kraftliner, although the full €100/t increase did not take hold in any cases. However, the market remains tight, with paper producers already asking customers to confirm November volumes in what was an unusually early move.

### Intense negotiations over newsprint prices

Talks about fourth-quarter newsprint prices gathered pace in Germany towards the middle of September and entered a critical phase in the penultimate week of the month. Several paper mills had opened talks by seeking hikes of up to €50/t, saying that higher prices were urgently needed given market conditions and the cost climate. What's more, paper industry representatives repeatedly pointed out that supply and demand had returned to a state of balance. Any short-term machine outages could severely disrupt the supply chain, they noted, adding that this made it all the more important to ensure that the newsprint business was profitable.

The deteriorating cost situation was also weighing heavily on the market. Paper industry insiders are expressing concern about current gas and electricity prices, remarking that the paper business was already barely profitable and maintaining output was becoming increasingly difficult. Costs might rise again in the fourth quarter. Paper industry insiders also told EUWID that the availability of recovered paper had not improved, requiring manufacturers to invest significant effort in collecting and storing. In addition, differing prices of coldset and heatset newsprint remain an issue in the current round of negotiations.

Customers often described paper mills' price plans as excessive. In their view, rising paper prices were hard to reconcile with a newsprint market that was still contracting on the whole. As a result, there was "limited" acceptance of their plans to charge more.

Buyers told EUWID that they did not expect the market to return to a state of balance until next year, once King's Lynn stops making newsprint. They are not presently seeing any lasting problems with sourcing newsprint, although

#### Copyright notice

The individual articles, tables and other contents published by EUWID are protected by copyright and are provided exclusively for the client's own use and the use of the client's employees. In the absence of a more extensive licence agreement, only one copy may be printed for circulation at a single business location designated by the client. Digital distribution of EUWID contents, especially by intranet or by e-mail, within a company, throughout a group of companies, or outside a company is not permitted and constitutes an infringement of copyright law. Read more in our FAQ.

they did confirm some delivery delays for a variety of reasons. Buyers agree that higher paper prices could fuel the existing trend of dwindling demand.

Publishers are printing fewer and fewer newspapers. Overall, the decline was said to be relatively steady, but the trend was clear and continued year after year, insiders said. Experts did not rule out even larger fluctuations, underscoring the risks that AI posed for newspaper publishers. At the same time, advertising printing is showing a surprisingly sharp decline in 2026. Several insiders report that demand for heatset newsprint has recently fallen by almost 10 per cent, adding that the German market has performed better than the European average.

Market players said that while some printers are doing quite well, others are grappling with insufficient capacity utilisation as print customers continue to cut their budgets. Several sources feel that commercial printers have reached a critical juncture. Things are anything but calm in the printing sector, experts told EUWID, listing volumes, margins and costs as critical factors. Advertising print customers, in particular, are reportedly often citing costs when reducing their order volumes.

Buyers said that high paper prices were putting further pressure on an already severely strained market. They are finding it really hard to pass mounting costs on to their print customers. Observers added that the liquidity position of many companies continued to worsen.

### **Brown kraftliner still in tight supply in Germany**

The market had expected the latest price increase for unbleached kraftliner to be implemented relatively early on. Negotiations therefore centred less on resisting or delaying the increase than on limiting its scale. EUWID sources note that the full €100/t increase was not implemented.

The brown kraftliner market remains tight in Germany. It is not yet genuinely facing a shortage or scarcity, but producers and converters said that no extra volumes were available. Budgeted volumes are being delivered on time, although customers now need to order much earlier to secure supply commitments, it is learnt. Producers are reportedly already asking customers about their November volumes, which is said to be unusually early. Anyone wishing to place volumes above their normal allocations is unable to obtain confirmation, even for November, respondents told EUWID.

In light of this situation, some companies said that they could have instituted their price plans in full, with the smaller adjustments simply representing a concession to customers. Some sources also said that the hike had not been implemented in full because another round was being planned. For now, this remains highly speculative, and sources cite a range of possible reasons for another announcement. Nevertheless, the market is not expected to ease materially in the remainder of the year.

#### **Copyright notice**

The individual articles, tables and other contents published by EUWID are protected by copyright and are provided exclusively for the client's own use and the use of the client's employees. In the absence of a more extensive licence agreement, only one copy may be printed for circulation at a single business location designated by the client. Digital distribution of EUWID contents, especially by intranet or by e-mail, within a company, throughout a group of companies, or outside a company is not permitted and constitutes an infringement of copyright law. Read more in our FAQ.

Demand provided less support for higher white-top kraftliner prices, with producers instead pointing primarily to substantial cost pressure. There is no talk of a tight market, but supply is not described as plentiful either. Unlike for brown grades, availability was reportedly not the main factor driving the price adjustment.

By contrast, the picture is clearer for primary-fibre semi-chemical fluting prices. Negotiations point to a price adjustment no earlier than the start of October.

**Copyright notice**

The individual articles, tables and other contents published by EUWID are protected by copyright and are provided exclusively for the client's own use and the use of the client's employees. In the absence of a more extensive licence agreement, only one copy may be printed for circulation at a single business location designated by the client. Digital distribution of EUWID contents, especially by intranet or by e-mail, within a company, throughout a group of companies, or outside a company is not permitted and constitutes an infringement of copyright law. Read more in our FAQ.

# Smurfit Westrock restructures Lurgan packaging plant

 **EUWID +** 30 September 2026 | [Published in issue 40/2026](#)

Smurfit Westrock has confirmed plans to restructure its corrugated packaging plant in Lurgan, Northern Ireland. According to the company, up to 55 employees could be affected, although the consultation process is still ongoing and the final number has not yet been determined. The Lurgan plant manufactures corrugated packaging for industries including food, beverages and cosmetics.

The restructuring forms part of a planned investment programme over the next 18 months aimed at strengthening and modernising operations. According to Smurfit Westrock, the measures are intended to support the company's long-term commitment to customers while maintaining its focus on service, quality and innovation. The restructuring is expected to be completed by the end of 2026.

"The proposed restructuring is focused on securing a resilient and sustainable future for the business and our customers," said Eddie Fellows, CEO of Smurfit Westrock Ireland & UK.

The measures come against the backdrop of broader capacity optimisation within the group. When presenting its second-quarter results at the end of July, Smurfit Westrock said it was in the process of closing eight converting facilities in Europe and North America.

The company also closed its SSK containerboard mill in Birmingham at the end of July 2026. The site had capacity to produce around 200,000 tpy of fluting and liner for the UK and Irish corrugated packaging markets.

## Copyright notice

The individual articles, tables and other contents published by EUWID are protected by copyright and are provided exclusively for the client's own use and the use of the client's employees. In the absence of a more extensive licence agreement, only one copy may be printed for circulation at a single business location designated by the client. Digital distribution of EUWID contents, especially by intranet or by e-mail, within a company, throughout a group of companies, or outside a company is not permitted and constitutes an infringement of copyright law. Read more in our [FAQ](#).

# Steirerpack enters insolvency proceedings

 **EUWID +** 30 September 2026 | [Published in issue 40/2026](#)

Reorganisation proceedings without self-administration have been opened on 21 September for Austrian corrugated packaging producer Steirerpack, according to the Austrian creditor protection association KSV1870. Lawyer Helmut Fetz from Fetz & Partner was appointed as the insolvency administrator.

Steirerpack has 67 employees and produces different packaging products, including corrugated packaging and folding boxes. Its product range includes die-cut packaging, fruit and vegetable crates, paper bags as well as shipping, transport and bulky board packaging.

According to KSV, Steirerpack said the insolvency was due to a difficult market environment as well as high margin pressure. Moreover, it cited financing and liquidity needs, declining order intake and technical downtimes.

According to the available information, the firm's business activities are slated to continue. Restructuring measures are planned, including resizing the business operations and focusing on production and customer segments that are economically viable in the long term, KSV said. In parallel, talks are reportedly taking place with financing partners. The insolvency administrator must now examine whether continuing business operations is in the interest of the creditors and whether the submitted reorganisation plan is achievable. The responses of the insolvency administrator were not yet available as of EUWID's editorial deadline.

## Copyright notice

The individual articles, tables and other contents published by EUWID are protected by copyright and are provided exclusively for the client's own use and the use of the client's employees. In the absence of a more extensive licence agreement, only one copy may be printed for circulation at a single business location designated by the client. Digital distribution of EUWID contents, especially by intranet or by e-mail, within a company, throughout a group of companies, or outside a company is not permitted and constitutes an infringement of copyright law. Read more in our [FAQ](#).

# Crown Paper Mill starts up first tissue machine in Dammam

📅 **EUWID +** 30 September 2026 | [Published in issue 40/2026](#)

Saudi tissue producer Crown Paper Mill (CPM) started operations at its new tissue mill in Dammam, Saudi Arabia, on 9 September. The facility is the company's first production site outside the United Arab Emirates and is intended to serve growing demand in the Saudi and regional tissue markets.

The new mill is equipped with a Valmet Advantage DCT 200 tissue machine with a working width of 5.6 m and a design speed of up to 2,200 m/min. According to CPM, the machine has an initial annual production capacity of 65,000 tpy, bringing the company's total tissue capacity to 165,000 tpy.

CPM already operates three tissue machines at its Abu Dhabi mill, with a combined annual capacity of 100,000 t.

## Copyright notice

The individual articles, tables and other contents published by EUWID are protected by copyright and are provided exclusively for the client's own use and the use of the client's employees. In the absence of a more extensive licence agreement, only one copy may be printed for circulation at a single business location designated by the client. Digital distribution of EUWID contents, especially by intranet or by e-mail, within a company, throughout a group of companies, or outside a company is not permitted and constitutes an infringement of copyright law. Read more in our [FAQ](#).

# Sappi to increase prices for label paper

📄 **EUWID +** 30 September 2026 | [Published in issue 40/2026](#)

**Sappi Europe** wants to increase label paper prices. The company announced a price hike of €37/t for its wet glue label paper grade Parade Label Pro and of €97/t for its wet strength label paper grade Parade Label WS. The increases are set to apply to new orders and deliveries as from 1 November. Sappi cites rising costs as the reason for this move.

## Copyright notice

The individual articles, tables and other contents published by EUWID are protected by copyright and are provided exclusively for the client's own use and the use of the client's employees. In the absence of a more extensive licence agreement, only one copy may be printed for circulation at a single business location designated by the client. Digital distribution of EUWID contents, especially by intranet or by e-mail, within a company, throughout a group of companies, or outside a company is not permitted and constitutes an infringement of copyright law. Read more in our [FAQ](#).

# Essity is looking for a new CFO

 **EUWID +** 30 September 2026 | [Published in issue 40/2026](#)

**Fredrik Rystedt** will relinquish his positions as CFO and executive vice-president of Essity in the course of 2027. Mr Rystedt has informed the company of his desire to retire next year, according to a company statement. He has been CFO and executive vice president of Essity for more than nine years. He will continue in his current roles until a successor is appointed and handover is completed.

## Copyright notice

The individual articles, tables and other contents published by EUWID are protected by copyright and are provided exclusively for the client's own use and the use of the client's employees. In the absence of a more extensive licence agreement, only one copy may be printed for circulation at a single business location designated by the client. Digital distribution of EUWID contents, especially by intranet or by e-mail, within a company, throughout a group of companies, or outside a company is not permitted and constitutes an infringement of copyright law. Read more in our [FAQ](#).

# Dietmar Heinisser resigns from Andritz executive board

 **EUWID +** 30 September 2026 | Published in issue 40/2026

**Dietmar Heinisser** resigned from the executive board of Austrian technology group Andritz with effect from 21 September for personal reasons. Mr Heinisser was responsible for the Environment & Energy and Group Manufacturing Management business units on the board. Company CEO Joachim Schönbeck will take over Mr Heinisser's former duties until further notice. Andritz did not initially provide any information on a replacement.

## Copyright notice

The individual articles, tables and other contents published by EUWID are protected by copyright and are provided exclusively for the client's own use and the use of the client's employees. In the absence of a more extensive licence agreement, only one copy may be printed for circulation at a single business location designated by the client. Digital distribution of EUWID contents, especially by intranet or by e-mail, within a company, throughout a group of companies, or outside a company is not permitted and constitutes an infringement of copyright law. Read more in our FAQ.

# KlingeLe builds new logistics and service center

 **EUWID +** 30 September 2026 | [Published in issue 40/2026](#)

Germany's **KlingeLe Group** is building a new logistics and service location for KlingeLe Plus in the Staffel district of Limburg, Germany. The new building is scheduled for completion in mid-2027. The previous location in Villmar-Aumenau is then to be relocated to Limburg. The new location includes a 17 m tall high-bay warehouse and fully automated conveyor technology. The new building in Limburg will be built to meet Germany's KfW 40 high-efficiency energy standard and will be equipped with photovoltaic systems.

## Copyright notice

The individual articles, tables and other contents published by EUWID are protected by copyright and are provided exclusively for the client's own use and the use of the client's employees. In the absence of a more extensive licence agreement, only one copy may be printed for circulation at a single business location designated by the client. Digital distribution of EUWID contents, especially by intranet or by e-mail, within a company, throughout a group of companies, or outside a company is not permitted and constitutes an infringement of copyright law. Read more in our FAQ.

# Södra Cell upgrades recovery boiler at Mörrum pulp mill

📄 **EUWID +** 30 September 2026 | [Published in issue 40/2026](#)

**Södra Cell** has carried out maintenance and upgrade work on the recovery boiler at its Mörrum pulp mill in Sweden during the site's scheduled annual maintenance shutdown. According to technology supplier **Valmet**, part of the furnace floor of the recovery boiler was replaced after lifecycle assessments had identified wear in the area. The measure is intended to improve the long-term reliability of the recovery boiler and reduce the risk of unplanned downtime. Södra Cell Mörrum operates two fibre lines with an overall capacity of around 470,000 tpy of paper pulp and dissolving pulp for textile and other applications.

## Copyright notice

The individual articles, tables and other contents published by EUWID are protected by copyright and are provided exclusively for the client's own use and the use of the client's employees. In the absence of a more extensive licence agreement, only one copy may be printed for circulation at a single business location designated by the client. Digital distribution of EUWID contents, especially by intranet or by e-mail, within a company, throughout a group of companies, or outside a company is not permitted and constitutes an infringement of copyright law. Read more in our [FAQ](#).

# Akarton starts up production at Schüttorf packaging complex

📅 **EUWID +** 30 September 2026 | [Published in issue 40/2026](#)

Dutch corrugated packaging manufacturer Akarton has commenced production at the Schüttorf packaging park in Germany after announcing a partnership with Progroup earlier this year.

Until now, Akarton has focused on developing and making custom corrugated packaging and smaller production runs for customers in industry, logistics, fulfilment and e-commerce. The new plant in Schüttorf adds high-volume manufacturing capabilities to Akarton's capacity. One of the converting lines was designed to produce up to 800 corrugated packaging units per minute.

Akarton said that the two plants would retain distinct roles in the future, while complementing each other in both sales and technological capabilities.

Alongside high-volume products initially envisaged, Akarton said that it was already seeing demand for other types of packaging, including rotary and flatbed die-cut packaging.

The company is therefore considering whether to bring forward elements of a second expansion phase, originally scheduled for a later date. However, its immediate priority was to stabilise operations and bring existing production up to its planned capacity.

## Copyright notice

The individual articles, tables and other contents published by EUWID are protected by copyright and are provided exclusively for the client's own use and the use of the client's employees. In the absence of a more extensive licence agreement, only one copy may be printed for circulation at a single business location designated by the client. Digital distribution of EUWID contents, especially by intranet or by e-mail, within a company, throughout a group of companies, or outside a company is not permitted and constitutes an infringement of copyright law. Read more in our [FAQ](#).

# Perlen starts distribution of Pulpex bottles in Germany

 **EUWID +** 30 September 2026 | Published in issue 40/2026

In March this year, UK packaging technology company Pulpex and Swiss Perlen Industrieholding, which includes paper manufacturer Perlen Papier, agreed to cooperate in the area of paper bottles. Now Perlen reports that Pulpex fibre bottles are already available in Germany, currently in standard sizes of 300, 500 and 750 ml. Further sizes are in the planning stage and will expand the range available to 200 up to 1,000 ml in the future.

In addition, Perlen Papier is investigating the possibility of producing the bottles at its Perlen plant in the Swiss canton of Lucerne from the end of 2027. The aim is to establish a local production base close to the company's customers in Germany.

In March this year, Perlen Industrieholding secured the exclusive right to produce Pulpex paper bottles in the extended DACH region. The agreement covers Switzerland, Austria, Italy as well as southern Germany. In June, Pulpex announced that it was soon opening its first commercial-scale paper bottle factory near Glasgow, Scotland and that it was planning to supply the first commercial products in the course of this summer.

According to Perlen Papier, the recyclable fibre-based bottles are suitable for a broad range of products including water and other non-sparkling beverages, milk-based products and oil, wine and spirits, cosmetics and personal care products. The bottles are reported to be waterproof and therefore suited for refrigerator storage and e. g. bathroom applications.

## Copyright notice

The individual articles, tables and other contents published by EUWID are protected by copyright and are provided exclusively for the client's own use and the use of the client's employees. In the absence of a more extensive licence agreement, only one copy may be printed for circulation at a single business location designated by the client. Digital distribution of EUWID contents, especially by intranet or by e-mail, within a company, throughout a group of companies, or outside a company is not permitted and constitutes an infringement of copyright law. Read more in our FAQ.