

Lucart to install new tissue machine in France

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Lucart plans an expansion of its Laval-sur-Vologne mill in France

Italian tissue products manufacturer Lucart Group plans to install a new tissue machine at its mill in Laval-sur-Vologne, France. The company says the investment will drive its expansion in the French market. At the same time, processes on the new machine are to be electrified in order to reduce CO2 emissions.

The new Toscotec-supplied machine will have a capacity of 75,000 tpy. According to Toscotec, it can operate at speeds of up to 1,800 m/min and will

produce tissue paper with basis weights of 15-22 g/m² for high-quality toilet and towel paper. Start-up of the new PM 15 is scheduled for the end of 2027. The investment is part of the group's strategy to increase its tissue production capacity to 400,000 tpy by the end of 2027.

A key feature of the new installation is the electrification of the drying process, facilitating a progressive transition to low-carbon energy sources. The heat required for the energy-intensive drying process will be supplied by a new electric steam generator. According to Lucart and Toscotec, the new line can therefore operate on 100 per cent electricity, thereby minimizing its overall carbon footprint.

The Laval-sur-Vologne paper mill, which has been part of the Lucart Group since 2008, is celebrating its 150th anniversary this year. According to Lucart, the mill was one of the first sites in Europe to produce tissue from recycled beverage cartons in 2011. Lucart currently operates two paper machines and nine converting lines at the site. A logistics centre is located in nearby Saint-Dié-des-Vosges for shipping products to France, Germany, the Benelux countries and northern European markets.

Lucart employs 350 people in France and generated sales of €125m with its French business in 2025.

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Sappi announces new CEO for North American business

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Kirk Ross will become CEO of Sappi North America next year

Sappi has appointed Kirk Ross as new President and CEO of its Sappi North America business division, effective 1 January 2027.

He will take over from Mike Haws, who will retire in February 2027. Mr Haws has been Sappi North America's President and CEO for seven years.

Mr Ross currently serves as Vice President Manufacturing for Sappi North America. He brings nearly three decades of industry experience and two

decades of leadership within Sappi to his new role, the company says.

Sappi North America is headquartered in Boston, Massachusetts. The company runs the Somerset, Cloquet and Westbrook production sites in the US, the Matane mill in Canada as well as several sales offices, a technology centre and a sheeting facility in the US. Sappi North America employs around 2,000 employees. Its product portfolio includes packaging papers, specialty papers, graphic papers and pulp.

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Fedrigoni CEO Marco Nespolo to step down; Rolf Stangl named executive chairman

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[Marco Nespolo](#) will step down as CEO of Fedrigoni and chairman of the group's board on 6 October to pursue new professional opportunities, the Italian producer of specialty papers and self-adhesive materials for labels and packaging has announced.

After nearly eight years in the roles, Mr Nespolo will be succeeded as executive chairman by [Rolf Stangl](#) on the same date.

Together with the group CFO and the CEOs of Fedrigoni's operating units, Mr Stangl will oversee the group's strategy aimed at further profitable growth.

Mr Stangl has more than two decades of leadership experience in the global packaging industry. He served as CEO of SIG Group AG from 2008 to 2020 and most recently worked as a senior adviser to Apollo Global Management.



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Norske Skog completes Saugbrugs asset sale to NND

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Norske Skog completed the agreed-upon sale of portions of the Saugbrugs industrial site to the Norwegian agency Norsk Nukleær Dekommisjonering (NND) in the third quarter of 2026. The proceeds from the sale amount to NOK770m, of which NOK400m will be used to repay short-term debt. The remaining amount will be used to strengthen liquidity, Norske Skog announced.

The sale includes certain areas of the industrial site neighbouring the research reactor in Halden, as well as the building housing paper machines PM 4 and PM 5. Norske Skog Saugbrugs will have access to the areas until the second half of 2028 to continue operating the two machines, the company explained in a filing with the Euronext stock exchange in Oslo.

NND needs the land for the decommissioning of the Halden nuclear research reactor, which was shut down in 2018. The work is expected to take 25 to 30 years. Norske Skog Saugbrugs will lease the properties until handover and has certain obligations related to this.

According to Norske Skog, the transaction results in a book gain of approximately NOK330m, which the company will recognise in the third quarter and which will have a positive impact on Ebitda.

Norske Skog Saugbrugs runs two publication paper machines, PM 4 and PM 5, with a total installed capacity of approximately 200,000 tpy of SC paper. The company is considering [restarting paper machine PM 6 at its Saugbrugs mill in Norway](#), which has been idle since a rockslide in April 2023, and converting it into a swing machine capable of producing both SC paper and kraftliner.

A decision on the project, originally scheduled for the second quarter, is now expected in the second half of the year.



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Changes at the helm of Cepi

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Cepi, the Confederation of European Paper Industries, has appointed [Francesca Stevens](#) as director general.

She took up the role on 28 September, succeeding Jori Ringman, who had led the association since 2019.

Ms Stevens joins Cepi from Europen, the European Organisation for Packaging and the Environment, where she had served as secretary general since 2020.

In Brussels, Ms Stevens was a recognised advocate, active on some of the EU's most important policy debates, notably sustainability, circularity, competitiveness and the Single Market, Cepi said.



Francesca Stevens löst Jori Ringman als neue Cepi-Generaldirektorin ab

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Antalis to acquire Papyrus operations in Germany and Central and Eastern Europe

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Paper merchant Antalis is set to acquire Papyrus' paper distribution activities in Germany, Switzerland and eight Central and Eastern European countries. The two companies have signed a binding agreement for the transaction.

The deal covers Papyrus operations in Germany, Switzerland, the Czech Republic, Slovakia, Hungary, Poland, Romania, Estonia, Latvia and Lithuania. The businesses generated combined net sales of around €215m in 2025 and employ 255 people. The companies operate twelve warehouse locations, serve more than 13,000 customers and offer around 21,000 products, mainly in printing and office papers.



Completion remains subject to customary closing conditions and approval by the relevant European competition authorities. Until then, the businesses will continue to operate independently.

Antalis CEO Hervé Poncin said the acquisition would strengthen the company's presence and distribution capabilities in the region. Combining the customer bases, teams and logistics networks would also help expand the company's offering and support customers more effectively.

Antalis is part of Japan's KPP Group Holding and employs around 4,300 people in 34 countries. It serves some 100,000 customers through 120 distribution centres worldwide. KPP reported consolidated sales of JPY650bn (€3.6bn) for the financial year ended 31 March 2026.

Papyrus belongs to Sweden's Optigroup and specialises in the wholesale distribution of paper, packaging and related products.

Optigroup is a pan-European distributor of packaging, graphic and office paper, cleaning and hygiene products, safety equipment and medical supplies. The group employs more than 2,300 people and generated net sales of €1.42bn in 2025. According to Optigroup, Papyrus and Scaldia operations in Netherlands, Belgium and Luxemburg, Sweden, Denmark, Norway and Finland are not part of the deal and will remain within Optigroup.

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EU reiterates concerns over UPM/Sappi JV, companies aim to address these further

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In a Letter of Facts, the European Commission has reiterated its concerns regarding the planned joint venture between the graphic paper divisions of UPM and Sappi. The two companies stated that they were continuing to work on addressing these concerns.

In a press release, UPM said that the two companies were in the process of carefully analysing the EU's Letter of Facts and preparing a response. The

company said it did not share the Commission's preliminary assessment and would continue to participate actively in the investigation. The proposed joint venture would strengthen long-term competitiveness, sustainability and resilience of the European graphic paperboard industry, UPM stressed.

To address the Commission's concerns, the parties plan to submit proposals for specific remedial measures, but – given the reasons for the transaction – no divestments.

Sappi has made similar comments, stating that the proposed joint venture is an appropriate response to the structural decline in the European markets for graphic papers. By pooling complementary assets and expertise, it would be possible to create a more efficient and sustainable production platform, enable orderly capacity management in line with market demand, and help ensure a reliable supply of graphic board to customers across Europe.

UPM points out that the proposed joint venture is being assessed at a time when the European Commission is updating its competition policy approach to better reflect Europe's changing economic and strategic environment in an increasingly fragmented world. According to UPM, the Commission leadership has rightly called for merger reviews that, while safeguarding effective competition, also give due weight to resilience, innovation and investment as well as longer-term market dynamics. This approach is reflected in the draft of the Commission's revised Merger Regulation, which was published on 30 April 2026.



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The company believes that the planned joint venture represents a rational response to these market realities. It would enable a more orderly adjustment of industry capacity, while at the same time ensuring reliable supply to customers and delivering significant efficiency gains. Without the joint venture, UPM expects conditions in the European graphic paper industry to deteriorate further: European manufacturers would come under growing pressure, accelerating capacity closures and potentially leaving customers more dependent on imports in the short term as the range of paper grades produced in Europe shrinks sharply. Persistent market decline and overcapacity would make it increasingly difficult to maintain a competitive and reliable European supply base, according to UPM.

UPM and Sappi announced [plans for a joint venture](#) in 2025 and signed the definitive agreement for the transaction in May 2026. The transaction requires, amongst other things, approval from the competition authorities. Most countries, including China, South Africa and the US, have already approved the transaction, according to UPM. The European Commission's final decision is expected by the end of the year or shortly thereafter. UPM and Sappi intend the joint venture to begin operations the transaction has been completed.

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Sappi announces paperboard price increase

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Sappi Europe has announced a price increase of €89/t for its entire paperboard portfolio.

The increase is set to apply to all new orders and deliveries from 1 November.

Sappi cites ongoing cost pressures as the reason for the move, stating that a price adjustment is necessary despite productivity gains, efficiency measures and cost-cutting initiatives.



Sappi offers a portfolio of paperboards, including Solid Bleached Board (SBB) and Solid Bleached Sulphate (SBS), for packaging and graphic applications.

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Igepa shareholders acquire Freytag & Petersen

06 October 2026 [Alexander Ungemach](#) Published in issue 41/2026



Freytag & Petersen, a long-established German wholesale company specialising in print media and packaging materials, is changing hands.

Its sole shareholder, Heinrich Hugo Best, is transferring his entire stake to Igepa Großhandel Beteiligungs GmbH. This company is jointly owned by the four Igepa Group shareholder companies 2H, Vph, E. Michaelis & Co. and Geiger.

Freytag & Petersen runs sites in Cologne, Dortmund and Trier and employs more than 250 people. Over the coming weeks and months, Freytag & Petersen and the group's operating company Igepa Großhandel GmbH will gradually be brought together. Structures and processes will be aligned, existing strengths combined and synergies realised, Igepa reports.

As part of the succession arrangements, shareholdings in other Igepa companies are also being reorganised. The stakes previously held by Freytag & Petersen will be transferred to the four remaining Igepa shareholder companies. These companies will thus jointly assume responsibility within Igepa, including for Freytag & Petersen's regional presence and further development.

The joint company will be led by the existing managing directors, Ralf Höllmann, Sven Kaufmann and Ingo Osterheld. Customers, suppliers and business partners will retain their usual contacts.

"We are confident that these succession arrangements set the right course for the future. They combine continuity with clear and reliable ownership structures and strengthen Igepa as it continues to develop," the company said in statement.

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Igepa Group offers industrial, commercial and trade customers a broad range of paper, signage products and packaging throughout Europe. It employs around 2,950 people at more than 79 locations in 23 countries. Including all strategic partners, its Europe-wide turnover amounted to approximately €1.6bn in 2025.

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Papelera de Oiartzun takes on part of Papresa's insolvency debts

EUWID+ 06 October 2026 Valeria Buß | Published in issue 41/2026

Papelera de Oiartzun, part of Spain's CL Grupo Industrial, has assumed selected insolvency claims and liabilities as part of its acquisition of the production assets of insolvent paper manufacturer Papresa. According to information now published by the insolvency administration, the claims assumed add up to around €15.5m.

The new owner assumed payment of the claims held by creditors Gestcompost (€1.1m), Prefabricados Ferrobloque (€0.2m) and Aguas del Añarbe (€1.3m). In addition, it assumed obligations arising from leasing contracts with Link Capital 2000 and Santander Alternative Investments amounting to €7.2m and €5.8m, respectively.

The remaining insolvency debts remain with insolvent Papresa. Papelera de Oiartzun had only acquired Papresa's production unit and the assets associated with it. According to the insolvency administration, total claims against Papresa amount to €146.3m, of which the insolvency administration recognises €129.2m.

Papelera de Oiartzun now operates former Papresa mill

The former Papresa mill in Erreñería has been operated by Papelera de Oiartzun since July 2026. Spanish group CL Grupo Industrial founded Papelera de Oiartzun specifically to handle the acquisition. The transfer of the production unit to the company was approved by the commercial court of Donostia-San Sebastián in June and became legally binding on 16 July.

A court order states that Papelera de Oiartzun took over all industrial and operational assets required to continue the business, including PM 4 and PM 5 at the site. The company also undertook to maintain business activities for a period of at least three years and to continue operating both production lines. The document also indicates that Papelera de Oiartzun is retaining 167 of the mill's employees instead of the 148 originally envisaged.



The former Papresa mill continues to produce newsprint and containerboard following its acquisition by Papelera de Oiartzun.

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This means that production of newsprint is now continuing in Erretería alongside the production of corrugated case material. In initial takeover talks with Papresa, CL Grupo Industrial had said it intended to acquire only the packaging paper business and discontinue newsprint production, but later revised this position.

Papresa entered insolvency proceedings in April this year. CL Grupo Industrial subsequently submitted a takeover offer and acquired the company's production assets for around €39m.

The Erretería mill was once dedicated exclusively to newsprint production. In 2022, the PM 5 was converted to the production of recycled corrugated case material. The PM 4 continues to produce newsprint. According to earlier information, total capacity of the two machines amounts to 375,000 tpy. A third paper machine at the site was shut down a few years ago, according to industry insiders.

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Italian recyclers call for fuel price cap for road haulage

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Italian recycling association Unirima has called for recent measures to cap fuel prices in Italy to be extended to road haulage companies, warning that higher transport costs are adding to pressure on the waste management and recycling sector.

Unirima said fuel was one of the main operating costs for companies collecting recyclable waste from businesses, leaving them particularly exposed to recent price increases. The sector is already under pressure from falling secondary raw material prices and the crisis in the plastics industry, the association added.

The Italian government has called on energy companies to cap fuel prices, prompting measures from Eni, Socar and Q8. Eni has capped petrol and diesel prices at participating Enilive filling stations and separately introduced a 20 per cent discount, excluding value added tax, on fuel for the agricultural and fishing sectors until 31 October, with a possible extension until the end of the year. Q8 Italia has introduced a 30-day cap on petrol and diesel prices from 1 October. The measures have largely been aimed at motorists and households.

Unirima argues that road haulage has been left out of the measures announced so far, which it says have benefited private customers and selected sectors. Commercial transport companies also obtain diesel through supply channels outside the ordinary retail filling-station network and therefore do not necessarily benefit from price caps at filling stations. "The sharp increases of recent months are having a heavy impact on the collection of recyclable waste from commercial and industrial (C&I) waste generators," said Unirima director general Francesco Sicilia.

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Third-quarter coreboard prices rise in Germany

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Some coreboard manufacturers in the German market raised prices again at the end of the third quarter, following the hikes that occurred in the second quarter.

However, the latest increases were not always scheduled to take effect by the end of September, but in some cases only from early October. As a result, market prices still do not reflect a uniform upward movement. In addition, some players which already pushed through an increase of €40/t in September apparently want to implement a second step at the beginning of the fourth quarter. The wide range of price demands, spanning €60 to €90/t, is also considered unusual.

According to converters, availability of coreboard remains good despite the closure of the Schulte and Cenpa plants. Buyers say they are still able to meet their requirements without difficulty, mainly because demand remains weak and has shown no significant improvement in recent weeks and after the holiday period. Market sources say that supply would be tighter under normal demand conditions. Availability appears to be constrained only for grammages used in the production of tissue cores.

For cores producers, such a rapid succession of price increases is rather unusual, especially given the prospect of further hikes in October. The increases would therefore have to be passed down the value chain relatively quickly. Even though higher costs are now an issue in all industries, passing them on to their own customers is by no means automatic, cores producers say.

EUWID Price Watch Germany Coreboard September 2026			
Prices in € per tonne free delivered	30 September 2026	2 July 2026	25 September 2025
Coreboard 250 l/m ² , 0.7 mm	640 - 740	640 - 700	610 - 650
© 2026 EUWID Europäischer Wirtschaftsdienst GmbH All rights reserved		EUWID assumes no liability for the accuracy of pricing information.	

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Cost pressure prompts starch manufacturers to seek hefty price hikes from paper industry

Starch plants push up prices for fourth-quarter deliveries

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With demand for native wheat starch healthy, starch manufacturers are in the process of passing on higher costs, particularly for energy and transport, to paper mills. The latest round of negotiations on fourth-quarter delivery terms therefore culminated in across-the-board price increases that often exceeded 10 per cent. In light of the poor harvest throughout Europe and reduced availability, producers of native corn and potato starch are convinced that they will succeed in raising their prices, too. In this context, several insiders reported that pea starch was being offered selectively to the paper industry at competitive prices.

EUWID Price Watch Western Europe Native Starch			
Third quarter 2026			
Prices in € per tonne	Third quarter 2026	Second quarter 2026	Third quarter 2025
Potato starch	600 - 800	650 - 850	850 - 1,050
Corn starch	450 - 490	425 - 460	420 - 450
Wheat starch	420 - 460	390 - 440	415 - 445
© 2026 EUWID Europäischer Wirtschaftsdienst GmbH All rights reserved		EUWID assumes no liability for the accuracy of pricing information	

The prospect of a successful outcome of the latest round of price talks for starch manufacturers has lifted sentiment in the sector. That being said, multiple starch industry representatives cautioned that it was unclear whether the hikes would be enough for them to return to profit-making territory. Business had not been sufficiently profitable for starch manufacturers in recent years. Even now, the situation remained challenging and unusual, they said, adding that not all manufacturers had secured adequate price increases. In addition, the burden arising from numerous additional costs was adding up.

Starch industry insiders underscored rising fertiliser prices. They said that the poor harvest had been a particularly significant factor in sending raw material costs higher. Moreover, they stressed that the international trade in wheat and maize had been disrupted noticeably by the war in Ukraine.

Other cost hikes were also apparent, with sources highlighting high gas and diesel prices that affected the starch business as a whole. Production and transport had become much more expensive, contacts said. Higher logistics costs are said to be prompting starch producers to focus sales more on smaller catchment areas. This was dampening overall competition and could explain regional price differences, market players pointed out. Experts added that the prospects of the market easing and of potential relief on the cost front were not good.

Starch suppliers pushing for Q4 price hikes

EUWID sources unanimously confirmed that the paper industry's demand for native wheat starch has risen noticeably in recent months. At the same time, supply was adequate, but tended to be lower than last year, contacts said. Starch suppliers are therefore said to have greater scope and stronger arguments to prioritise margins. Observers noted that sellers had become more confident and that their demands had increased during the latest round of talks, not least given upcoming talks for the first quarter of 2027.

In talks about fourth-quarter prices, starch manufacturers originally sought increases of up to €100/t for native wheat starch. Paper manufacturers quickly pushed back, in some cases strongly. While there was a certain degree of understanding that suppliers faced additional costs, they denied the claims of tightening availability often raised by suppliers.

Nonetheless, buyers from the paper industry said that they had little room to manoeuvre in the latest talks. After having to swallow hikes of €20-40/t for the third quarter, buyers of native wheat starch confirmed that fourth-quarter prices saw another increase by €50/t or more. The size of the increase generally depended on the starting price and on the extent of regional competition among suppliers, contacts told EUWID. In many cases, buyers reported discussions on increases of €60-70/t, or even up to €100/t.

While prices around the €500/t mark are being considered possible for large buyers of native wheat starch, the prices ultimately agreed with many paper mills were mostly in the range of €510 to €520/t. In the DACH region, deliveries are also often made at prices between €520 and €540/t.

Starch industry sources described the regional variations in Europe as very pronounced, with sometimes higher prices in southern and western Europe than in the DACH region.

Structural changes looming in neighbouring segments

The availability of corn has deteriorated sharply. The poor harvest has resulted in a tight market and high starch prices. Buyers confirm that the impact was felt quickly in the market. Prices for fourth-quarter deliveries of native corn starch could rapidly climb above the €550/t mark, following increases of at least €50/t and often as much as €100/t that were under discussion at the end of September. However, there are also several reports of supply agreements being inked at lower prices.

Industry insiders expect the shortfall in supply to be offset in part by wheat starch. The substitution of native and cationic corn starch with wheat-based alternatives has gathered pace.

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The potato starch business is also affected by reduced availability. Sources reported that, following a decline in cultivation area, the harvest had also been poor. With raw material costs rising accordingly, potato starch has become less attractive to the price-sensitive paper industry. Manufacturers can no longer sustain the recently lucrative spot prices. Quoted fourth-quarter prices for native potato starch start at €650/t, while starch industry representatives frequently cite €800/t as the benchmark. As a result, cationic potato starch is often offered at around €1,000/t or more.

Sources told EUWID that interest from the paper industry remained undiminished, at least for speciality paper grades. By and large, though, the use of potato starch in paper production continues to decline.

Positive momentum in demand

All things considered, the order situation has developed favourably during 2026 from the starch industry's perspective. While potato and corn starch suppliers had cause for complaint, demand for wheat starch had performed well, market players noted. Demand had strengthened, particularly from the packaging sector, and ordering activity among corrugated case material producers had improved markedly. Insiders also mentioned additional interest from neighbouring segments for wheat starch. The switch from corn to wheat starch is continuing.

Insiders say that pea starch is increasingly emerging both as an alternative and a competitor. Pea starch was now being offered at comparatively attractive prices.

Additionally, starch suppliers report positive momentum from the food-contact packaging segment, where starch-based barrier solutions for food-contact paper are in strong demand.

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Some label paper prices continued to climb in Q3 in Germany

Further price hike announcements not specifically scheduled for the start of Q4

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The market momentum seen in the previous two quarters continued to play out in the German label paper market during the third quarter of 2026. Paper

producers active in Germany told EUWID that capacity utilisation was consistently very high. Demand remained particularly strong for wet-strength and alkali-resistant paper. However, demand for non-wet-strength label papers was also described by industry sources as “healthy to stable.” This turn of events was reportedly still rooted in the closure of the German label paper producer Feldmuehle’s at the end of last year and the subsequent redistribution of volumes among other suppliers. This also affected the formerly strong export business of the Feldmuehle paper mill. Moreover, the long, hot summer had given a noticeable boost to beverage consumption, and thus demand for labels.

Market players reported that lead times for label papers lengthened in some cases during the heatwaves of high summer, especially for wet-strength grades. Paper manufacturers quoted lead times of up to eight weeks, while one converter even reported up to 10 weeks. By the end of September, however, the situation had eased: lead times had returned to five to six weeks for wet-strength papers and four to five weeks for non-wet-strength grades.

Even though demand is mostly weaker for seasonal reasons, label paper manufacturers do not anticipate a significant drop in demand in the fourth quarter. “We think that we will keep running until the year’s end,” one source remarked to EUWID.

No uniformity in pricing

The picture on pricing in the third quarter was mixed. Not all relevant paper manufacturers are said to have sent customers notices informing them of higher prices with effect from 1 July. Producers that did announce increases were reportedly able to implement their demands, although not in full. Depending on the supplier, prices for wet-strength and alkali-resistant label papers rose by €60-80/t, while non-wet-strength grades became €30-50/t more expensive. In some cases, prices were set in stone until the end of the year; in others, the agreed terms were reportedly valid only for the third quarter.

EUWID Price Watch Germany Label Paper			
Third quarter 2026			
Prices in € per tonne free delivered	Third quarter 2026		Second quarter 2026
			Third quarter 2025
Wet-strength and alkali-resistant 70-80 g (reels)	2,370	- 2,420	2,290 - 2,420
Non wet-strength 70-100 g (reels)	2,120	- 2,180	2,030 - 2,150
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A similarly mixed situation appears to be on the cards for the fourth quarter, as well. Converters said that the paper industry had attempted to seek higher prices at the start of the final quarter, although they claimed to have “fended them off.”

As EUWID conducted research for this market report in late September, few producers had announced further price increases, and these were not specifically due to take effect at the start of the fourth quarter. For instance, one paper manufacturer disclosed plans to charge at least 7 to 8 per cent more for all new orders on 31 August. Another intends to raise label paper prices with effect from 1 November and is seeking to tack on €37/t for non-wet-strength label paper and €97/t for wet-strength and alkali-resistant grades. The adjustments are to apply to new orders and deliveries from that date. Paper producers justified their plans by pointing to rising costs, especially for energy, logistics and a variety of raw materials, including pulp.

Observers believe that rising energy and logistics costs were likely weighing on recycled label paper suppliers, as well. Insiders said that prices in this segment had remained broadly unchanged in the third quarter.

The industry is awaiting the European Commission’s decision on the UPM-Sappi joint venture with keen interest. Sappi’s Gratkorn mill, including its label paper production, is included in the planned joint venture. Sappi’s Alfeld and Carmignano mills are outside the transaction’s scope. At UPM’s Jämsänkoski site, only PM 6 is included, while the label and speciality paper operations will remain with UPM.

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Prices for brown recovered paper grades rise in Poland towards end of Q3

Market players divided over outlook through year-end

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The Polish recovered paper market was largely quiet in the third quarter, although prices for the main brown grades rose moderately in September after a broadly stable summer. Lower collection volumes and demand from some paper mills seeking to replenish stocks supported the increases, with further rises now taking shape for October. Sorted graphic paper for deinking and white recovered paper grades, by contrast, saw little price movement.

EUWID Price Watch Recovered Paper Poland				
Third quarter 2026				
Prices in PLN/€ per tonne free delivered	Third quarter 2026		Second quarter 2026	Third quarter 2025
Supermarket corrugated paper/board in PLN/t (1.04)	410 -	560	400 - 500	510 - 560
Supermarket corrugated paper/board in €/t (1.04)	94 -	128	93 - 116	120 - 131
New shavings of corrugated board in PLN/t (4.01)	435 -	585	425 - 525	550 - 600
New shavings of corrugated board in €/t (4.01)	99 -	134	99 - 122	129 - 141
Sorted graphic paper for deinking in PLN/t (1.11)	800 -	900	800 - 900	850 - 950
Sorted graphic paper for deinking in €/t (1.11)	183 -	206	186 - 209	199 - 223
White woodfree uncoated shavings in PLN/t (3.18.01)	2,000 -	2,050	2,025 - 2,075	2,100 - 2,150
White woodfree uncoated shavings in €/t (3.18.01)	457 -	469	470 - 482	493 - 504
Exchange rate as of 2 October 2026: 1 PLN = €0.2287				
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The price increases expected for supermarket corrugated paper and board (1.04) at the beginning of the third quarter failed to materialise, at least on the Polish market. Instead, prices remained largely unchanged in July and August, according to traders. Paper mills reported only isolated adjustments of a few euros over the summer. The market began to move in September, when increases of around €5-15/t were reported. Recovered paper sellers typically cited increases of €5-10/t for deliveries to Polish paper mills, compared with around €5/t for sales to customers elsewhere in Europe.

Over the third quarter, prices for supermarket corrugated paper and board ranged from PLN410-560/t free delivered to the Polish mill, equivalent to around €94-128/t at the exchange rate on 2 October 2026. Prices at the lower end of the range were recorded early in the quarter, while the higher levels were seen in September. Prices for new shaving of corrugated board (4.01) followed a similar pattern, as usual.

Some paper mills have raised their purchase prices by a further €10/t for October or announced plans to do so. Recovered paper sellers expect other buyers to follow suit. One paper mill reported an increase of PLN20-40/t for grade 1.04.

Higher transport costs are adding to the pressure. Haulage costs have risen significantly again since the second half of September, adding around €5-7/t depending on the route, according to one recovered paper merchant. Tight lorry capacity is compounding the problem. Transport companies have pointed to other loads available to them and refused to make concessions on price. With plenty of other work available, logistics providers were unwilling to negotiate and were untroubled by customers declining their offers, one merchant said.

Expectations for the rest of the fourth quarter are divided. Some recovered paper sellers expect relatively low collection volumes in Poland, export opportunities and paper mills' need to build stocks ahead of Christmas to continue supporting higher prices. Some buyers, by contrast, expect supply to improve in October and prices to stabilise thereafter. A few believe that prices could even edge lower in November if mills have built up sufficient stocks.

Paper mills already stocking up for year-end

Recovered paper collection volumes fell during the summer holiday season, according to market participants, but views differ on how the situation has developed since then. Several recovered paper traders continue to describe collections in Poland as weak and expect no significant improvement in October. Others market participants, including some paper mills, however, reported higher collection volumes in September and said stocks were already increased significantly.

Not all Polish paper producers that ran down their stocks over the summer are thought to have replenished them sufficiently. These paper mills are therefore expected to step up buying in the coming weeks, as they need to secure sufficient supplies by mid-December, before collections and logistics become more restricted over Christmas. One buyer nevertheless questioned whether higher recovered paper prices would help, arguing that they would not bring additional volumes onto the market but merely intensify competition.

The main source of competition for Polish paper mills is exports of recovered paper to the Far East. Prices for 1.04 exported by container stood at €115-120/t ex works, well above domestic prices. Shipments to Ukraine, meanwhile, are reportedly broadly stable. These shipments mainly originate in southern and south-eastern Poland, where Ukraine is a natural outlet for logistical reasons.

Deinking prices stable as demand outlook becomes less certain

The market for deinking grades was largely stable in the third quarter, with prices for grade 1.11 at €190-210/t free delivered. Merchants surveyed by EUWID reported no significant difficulty sourcing or selling their usual volumes, while additional loads also found buyers.

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Domestic demand for sorted graphic paper for deinking in Poland remains subdued, with a large share of volumes continuing to go to customers in Germany and Austria, according to recovered paper sellers. The market is now facing some uncertainty after a major customer announced lower requirements as it considers changes to its production mix.

One recovered paper merchant believes concerns about oversupply are premature. When IP Kwidzyn and Wepa Piechowice, previously the largest buyers of deinking grades in Poland, dropped out of the market, significant surpluses were expected, but never materialised. The market adjusted, with almost all volumes subsequently finding buyers abroad. With less recovered graphic paper also becoming available, lower consumption would not necessarily lead to an oversupply, the merchant said.

The market for white recovered paper grades was also quiet in the third quarter. Merchants described supply and demand as stable, with no significant surpluses. Prices for white woodfree shavings (3.18.01) were most commonly quoted at €430-460/t free delivered.

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Autumn business fails to meet expectations on Poland's paper and board markets

Packaging continues to grow as fine paper and publication paper volumes fall

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The autumn recovery that insiders had hoped to see has yet to take hold on Poland's paper and cartonboard markets. While business picked up again in many places in September after a quiet summer, developments remain mixed. The corrugated board and folding carton segments continue to be the driving forces: demand for corrugated board and packaging is still growing, folding carton plants are operating at very high utilisation rates and are also benefiting from orders being redirected to Poland.

EUWID Price Watch Poland						
Third quarter 2026						
Prices in PLN/€ per tonne free delivered	Third quarter 2026		Second quarter 2026		Third quarter 2025	
Graphic paper						
Woodfree uncoated						
Copy paper 80 g A4 C grade in PLN/t	3,500	- 3,750	3,575	- 3,875	3,450	- 3,900
Copy paper 80 g A4 C grade in €/t	800	- 858	830	- 900	809	- 915
Offset sheets 80 g in PLN/t	3,800	- 4,100	3,875	- 4,100	3,875	- 4,275
Offset sheets 80 g in €/t	869	- 938	900	- 952	909	- 1,003
Offset reels 80 g in PLN/t	3,625	- 3,825	3,625	- 3,825	3,700	- 4,100
Offset reels 80 g in €/t	829	- 875	842	- 888	868	- 962
Woodfree coated						
Sheets, double coated, 100 g in PLN/t	4,000	- 4,300	3,875	- 4,300	4,050	- 4,475
Sheets, double coated, 100 g in €/t	915	- 983	900	- 998	950	- 1,050
Reels, double coated, 100 g in PLN/t	3,800	- 4,000	3,700	- 4,000	3,750	- 4,050
Reels, double coated, 100 g in €/t	869	- 915	859	- 929	880	- 950
Publication paper in €/t						
Standard newsprint 45 g	580	- 605	560	- 585	560	- 590
LWC offset 60 g	750	- 785	750	- 785	750	- 775
SC offset 56 g (A)	630	- 670	630	- 670	660	- 685
Packaging paper in €/t						
Primary fibre corrugated case material						
Unbleached kraftliner from Europe 175 g	830	- 940	770	- 860	740	- 790
White-top kraftliner 140 g	990	- 1,090	950	- 1,090	940	- 1,030
Recycled corrugated case material						
Recycled fluting	500	- 615	500	- 555	480	- 555
Testliner 2	540	- 645	540	- 585	440	- 585
Testliner 3	520	- 625	520	- 565	460	- 565
White-top testliner 140 g	560	- 650	560	- 610	560	- 620
Cartonboard in €/t						
GD 2	750	- 800	750	- 800	790	- 860
GC 2	1,000	- 1,130	1,000	- 1,130	1,100	- 1,150
Exchange rate as of 2 October 2026: 1 PLN = €0.2287						
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By contrast, graphic paper volumes remain on a downward path. At the same time, many manufacturers are pushing for higher prices amidst high costs and inadequate margins. Producers implemented significant price increases for corrugated case material in September, with scanner supply of newsprint also strengthening suppliers' hand. In other segments, though, surplus capacity and competition with imports from Asia are limiting the room for manoeuvre.

Fine paper manufacturers announce fresh price hikes after a lacklustre summer

As generally expected, slack demand continued to leave its mark on Poland's fine paper market in the third quarter. Paper producers reported that the price increases instituted in the spring had largely held. Concessions were made particularly where more substantial hikes had previously been implemented. However, these concessions were smaller than in other countries. Several manufacturers have announced further price hikes for the fourth quarter, although sources had mixed views about how much of these increases will actually take hold.

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"The third quarter was an absolute disaster," one manufacturer said, describing demand for woodfree coated paper in Poland. August was especially weak, with sales volumes tumbling by 25 per cent compared with the same month last year. Although deliveries did pick up again in September, experts said that the hoped-for strong autumn recovery had so far failed to materialise. As one EUWID contact said, companies had to come to terms with the fact that the once clearly defined peak season and the familiar pattern of the business year were now a thing of the past.

Despite making some concessions, producers managed to retain at least a portion of the spring price hikes in Poland over the summer. However, slack demand has not made things easy for manufacturers. Printers are competing for the limited number of orders and are passing this price pressure on to the industry via paper merchants. Low-priced offers from South Korea are intensifying competition. Insiders told EUWID that shipments from South Korea to Poland had not increased, but low-priced imports were exerting greater pressure in an already weak market.

In conversations with sources in the market, EUWID found that the hikes actually achieved in the second quarter varied widely by supplier and customer. While some sellers reported mark-ups of up to €100/t, most contacts tended to put the hikes at €40-50/t. Insiders doing business in Poland mostly quoted gross prices of over €1,000/t before discounts and rebates for double-coated sheets. Strategic accounts and direct deliveries are said to be priced below that level. Different local and centrally agreed rebates apply depending on the merchant group in question. In some cases, sheets are reportedly even cheaper than reels.

With their latest price increase plans, manufacturers are seeking to narrow price disparities across the market and announced hikes of five to seven per cent. One producer feels that increases of €20-40/t are realistic in Poland. Other sources are less confident. As long as stocks purchased by merchants at the old prices remain available, implementation is likely to be delayed, several market observers felt. Some major printing customers were also said to have secured unchanged prices until at least the end of October and in some cases even longer.

The summer unfolded largely as expected for the woodfree uncoated paper business. Volumes remained weak, with no significant changes reported in either prices or deliveries. One supplier said that there was no general move towards discounting, either. Manufacturers had little room to make further concessions, especially as lower prices would hardly drum up additional sales volumes. Sources described the downturn in consumption as the main reason for the weak demand.

Some paper mills have unveiled plans to charge more for uncoated fine paper across Europe, although several key suppliers to the Polish market have yet to communicate any price plans. Manufacturers announcing price hikes cited higher energy, raw material and transport costs, as well as unsatisfactory financial results. Lower pulp prices had reportedly provided a little relief in the meantime, but not enough to offset higher costs. One source viewed these announcements primarily as an attempt to stave off additional price cuts. Scarcely any signs of tangible progress were evident to date.

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Competition from Asia is also intensifying, especially for office paper and copy paper. Insiders are reporting price gaps of around €100/t compared with paper made in Europe. Asian suppliers were also said to be improving their logistics capabilities. Buyers had now learned to manage longer delivery routes and procurement risks by sourcing from multiple companies and combining European and Asian paper in their portfolios.

Looking ahead to October and November, woodfree uncoated paper producers expect the Polish market to pick up compared with the summer months, but there are still no signs of a substantial recovery. European paper mills continue to operate at inadequate capacity utilisation, insiders said, although some suppliers believed that they were better placed than their competitors.

Newsprint supply tightens, LWC remains readily available

Developments on Poland's publication paper market were diverging as the third quarter drew to a close. Newsprint has become much harder to source, with some suppliers also experiencing limited availability of SC paper. By contrast, LWC remains readily available. As a result, prospects for higher prices in the fourth quarter vary considerably. Producers initially announced plans to charge more across all segments. However, EUWID sources regarded proposed hikes of as little as €20/t, sometimes reduced to €10/t after initial talks, as a largely symbolic move.

Manufacturers still had little room to manoeuvre in price talks over the summer. Buyers were able to draw on inventories, while seasonally lower demand reduced the pressure to place orders. Around mid-year, SC and LWC paper prices stayed largely the same in Poland. Some buyers had to accept increases of €15-20/t for newsprint, while other customers continued to buy at existing terms. This meant that a few standard newsprint contracts for July already contained prices above €600/t, although many agreements were concluded at lower levels.

The newsprint market, in particular, has tightened more quickly than some sources had expected. Although the structural downturn in printing volumes continues, Polish printers are still in a relatively good position compared with the rest of Europe and reaping the rewards of orders being shifted from Germany and the UK. That being said, scantly supply now means that the remaining paper mills are operating at much better capacity utilisation. As the quarter drew to a close, buyers and suppliers mentioned that supply was much tighter. Some suppliers are unable to accommodate any additional volumes for October. "Machines are overloaded," one supplier said, describing the situation.

Several factors are coinciding to create this situation. Vipap Videm's insolvency has trimmed supply in Central and Eastern Europe, and the announced conversion project at Palm is already influencing the market, at least psychologically: Customers are looking for other suppliers, even though this machine is due to continue manufacturing until the year's end. One source also pointed to lower shipment volumes from Canada. Another

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contact told EUWID that demand from publishers had increased as they switched to improved newsprint for cost reasons.

Manufacturers are seeking to invoice up to €50/t more amidst the more balanced market and higher costs. In the final days of September, many talks were still in progress in Poland. Insiders reported that the first deals contained hikes of €20-25/t, with new prices of up to €640/t being under discussion. Buyers also reported unchanged prices below 600 €/t for the fourth quarter. Existing six-month contracts remain unchanged. In current negotiations, however, the outcome continues to depend on starting prices and contract terms. Unlike earlier in this year, sources see better prospects for price increases.

Availability of SC has also deteriorated at the third quarter's end, although insiders continue to say that printers and publishers largely have good amounts on hand. Prices in Poland remained stable on the whole in the third quarter.

So far, the fourth quarter appears set to bring only moderate change. One supplier reported a hike of €10/t after an initial proposal for twice that amount. If newsprint prices climb more, the price gap between the two grades will narrow, something that one source felt could affect customers' choice of grade.

This tightening is not evident in the coated magazine and catalogue paper segment. Order intake had improved a little after a slow summer but remained at low levels. Contacts told EUWID that supply was ample.

All relevant manufacturers have officially announced somewhat higher prices from October onwards, citing higher costs and inadequate earnings. However, achieving these hikes remains challenging. One supplier reported that even a gap of €10/t could prompt printers to move significant orders elsewhere. The risk of losing market share was massive. Overcapacity and alternative sources of supply continue to keep competition intense.

Additional enquiries received by some suppliers are likely to reflect, at least in part, uncertainty over the proposed Sappi-UPM joint venture. Customers are looking to diversify their sourcing base. Sources do not expect the market to change fundamentally until there is greater clarity on potential capacity changes.

All corrugated case material grades see significant hikes after a stable summer

After several months of stable prices, the main corrugated case material grades became much more expensive across the board in Poland in September. Paper manufacturers managed to secure substantial hikes they had sought for both recycled corrugated case material and kraftliner, citing cost and margin pressures. Comparatively healthy operating rates, relatively low inventory levels and constrained supply all helped underpin the increases.

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The Polish corrugated board market has expanded by more than three per cent since the start of the year, making it still one of the fastest-growing major European markets. Paper suppliers interviewed by EUWID did not report a significant upswing in September, with order levels varying from one company to another. Market players expect demand to follow its normal seasonal trend in the weeks ahead.

Recycled corrugated case material prices stayed largely the same between April and the end of August. Several buyers tried to negotiate more favourable terms for the summer months, but they were unable to secure widespread discounts. There were no summer discounts, one supplier said, summing up the situation. However, some concessions of up to €10/t had reportedly been made for additional volumes in limited cases. This did not result in any general downward trend, though.

Recycled corrugated case material suppliers benefited from a better balance between supply and demand. Additional volumes from new machines that are now operating more smoothly were largely offset by closures of older facilities. In addition, overseas exports had helped to limit supply in Europe.

Recycled corrugated case material manufacturers implemented hikes of €60/t in Poland, too, with effect from 1 September. Market players interviewed by EUWID indicated that higher prices had taken hold without significant delay. "All the increases have been accepted and are holding," one respondent said. It was the third round of price rises this year after hikes of €40/t in March and €60/t in April.

Uncoated white-top testliner prices largely became €40/t more expensive on the Polish market in September. Some suppliers are reportedly aiming to tack on another €20/t for October.

A few EUWID contacts now feel that producers might try again to raise prices in the fourth quarter in order to reach their initial goal of €80 or €100/t. Suppliers felt that continued cost pressure and healthy paper machine operating rates supported such moves, although this momentum has weakened of late. Energy costs remained high, but have softened somewhat. No substantial increases in recovered paper costs have been observed yet, either. However, market insiders say it remains unclear whether prices in Poland will rise further before the end of the year.

Corrugated board manufacturers in Poland are pinning their hopes on business stabilising. Several insiders think that falling prices might even be possible in November or December if upcoming annual talks and the anticipated additional volumes intensify sales pressure.

Looking ahead, observers are also raising the question of new paper capacity in Poland. While companies had made and continue to make significant investments in corrugated board, not a single machine has come online in the country since the start-up of Stora Enso's PM 5 in Ostrołęka at the start of 2013. Instead, investments had been limited to rebuilds and expanding existing machines. With demand growing in Poland, experts think that a new paper

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machine is conceivable, although no firm projects are currently known.

Brown kraftliner prices also edged higher in September, rising by €80/t. Suppliers had previously increased prices by €60/t in April and another €60/t in mid-June. Including the €20/t price cut instituted in January, prices are €180/t higher than they were at the start of the year.

Converters in Poland are again reporting exceptionally little scope for negotiation in this segment. This increase had “come through like a steamroller,” one buyer said. Market players do not anticipate the situation to ease in the near term. Capacity closures in North America are said to be diverting more European kraftliner to overseas markets, particularly North and South America. This was limiting supply in Europe. International demand was thus expected to keep European prices high in the fourth quarter, too.

White-top kraftliner became €60/t more expensive at the same time as unbleached grades.

The wider gap to testliner prices is also creating a greater incentive to replace kraftliner with recycled grades. Experts said that customers were prepared to test alternatives where technical requirements allowed.

Higher paper costs put pressure on corrugated board manufacturers

Poland’s corrugated board and packaging market continues to enjoy growth, although companies are also battling dwindling margins. The latest available data show year-to-date deliveries running around 3.6 per cent ahead of last year. This keeps Poland among the fastest-growing major European markets, although growth so far has tended to come in at the lower end of the range forecast for 2026.

Converters reported that business was weak over the summer, especially in August. A minor upturn surfaced in September, although it did not live up to expectations everywhere. One manufacturer described order intake as erratic. The autumn recovery had so far been a little weaker than in 2025 and was much weaker than during the packaging boom in 2022 and 2023. Insiders hope that the fourth quarter will bring a normal seasonal improvement.

At the same time, the hikes in paper prices instituted in September are intensifying cost pressure. One converter does not expect higher packaging prices before the second half of October at the earliest. Customers were reportedly trying to defer adjustments, while index-linked contracts with fixed review dates meant that producers might have to absorb higher costs for several months. Mounting energy and transport costs are adding to the pressure on converters.

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Significant overcapacity in Poland is keeping price competition intense. Some EUWID sources put it at around 30 per cent, while others deemed this figure to be overstated. At any rate, growth has so far not been strong enough to fully utilise the capacity already in place. Insiders said that corrugated sheet suppliers were engaged in especially fierce competition. Their low prices are giving non-integrated packaging companies an edge over firms that make their own corrugated board. Manufacturers thus had to sacrifice margins to maintain volumes.

Nonetheless, additional investments appear to be on the cards. Market players are reporting that three corrugated board plants are planned over the next one to two years. One is intended to replace an existing plant, while two would create additional capacity. None of these projects has been publicly confirmed. While some converters intend only to replace older machines in view of spare capacity, others appear to be continuing to pursue growth. Competition for capacity utilisation is therefore unlikely to ease in the near term.

GC and GD manufacturers unveil a fresh round of price increases

Many European cartonboard producers have also informed their customers in Poland of plans to charge more in the fourth quarter. At the end of September, it was still unclear how much of these substantial proposed increases could actually be achieved. Rather weak market conditions across Europe, available capacity at cartonboard mills, overseas imports and the resulting battle for volumes are all constraining producers' pricing opportunities.

Most suppliers surveyed by EUWID described demand for cartonboard from folding carton producers in Poland as better than in many other European markets in the third quarter. Some folding carton plants said that they were operating at full capacity in September. Intra-group transfers of orders to Poland, particularly from sites in neighbouring countries, are also playing their part. Nonetheless, cartonboard suppliers provided mixed assessments of demand in the third quarter. While some of them described summer business as solid and reported healthy order books for October, others saw only a slight improvement after weak summer months.

Capacity utilisation rates at mills making folding boxboard (FBB, GC) are similarly mixed. Industry sources told EUWID that some GC board mills are extremely well booked. Technical troubles at some other mills in Europe are also extending lead times. However, a general shortage cannot be inferred from this, with significant spare volumes still available, especially at recently added capacity.

Price hikes and surcharges instituted for GC this spring largely still applied over the summer in Poland. However, the pressure that customers were putting on prices remained high, producers noted. Isolated low-priced offers were reported, especially for reels, but sometimes for sheets, too. Market players stressed that these special deals did not point to a general reduction in prices in the third quarter.

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The latest round of price increases varies from one supplier to another in terms of the amount and timing. One producer with manufacturing operations in Poland has announced hikes of €75/t for GC from 1 October onwards. Two Scandinavian suppliers are officially seeking to charge €85/t and €100/t more from the start of November. Suppliers cited higher costs by way of explanation and also underscored the tighter supply situation after the latest capacity closures. That being said, not all relevant producers had announced price hikes by the end of September.

Experts anticipate that it will likely take several months for the price increases to take hold. Some customers have price commitments in place until the end of November or until the year's end. One supplier stressed that it would honour these commitments, with these customers not digging deeper into their pockets until December or January. Sources also reported agreements with an increase in two instalments: a first hike of €30/t from October and another €30/t from January at the latest. One market participant considers a mark-up of €50-60/t by January to be more realistic in Poland.

Existing temporary surcharges also had to be taken into account. Observers in Poland told EUWID that different suppliers still impose surcharges of up to €30/t for GC. The new round of price talks is expected to incorporate these surcharges into base prices, either in full or in part.

One EUWID contact stated that Folbb's insolvency filing has had only limited or indirect effects on business in Poland. Additional enquiries relate only to smaller volumes and specialty grades. Insiders have so far seen no major shifts in supply flows in Poland given Folbb's limited shipment volumes to the country.

White-lined chipboard (WLC, GD) prices remained under some pressure in Poland over the summer. Some GD board suppliers managed to hold onto the price levels achieved in April and May, while others offered special terms for selected volumes. One manufacturer still sees "enormous overcapacity". Soft demand was intensifying the fight for volumes and making it hard to charge prices that covered costs.

Looking to October, several producers have announced price increases of €75 to €80/t for recycled cartonboard grades with effect from or during October despite or perhaps because of these factors. Manufacturers cited higher costs for energy, recovered paper, chemicals and logistics in support of their plans.

Expectations of success remain muted. Customers are comparing offers and taking their time over negotiations, especially since annual negotiations are just around the corner or already under way. As with GC board, some suppliers have proposed two-stage increases: €30/t in October, followed by a further €30/t at a later date. For some customers, the full increase is reportedly being deferred until year-end. Polish folding carton producers expect to absorb closer to half of the announced hikes, and in some cases less. At the end of September, the outcome of the latest price round remained uncertain.

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Germany: Unclear price trend for recycled corrugated case material in October

Widely diverging positions in publication paper price talks

EUWID+ 07 October 2026 | Published in issue 41/2026

In the German market for LWC and SC paper, players have not yet reached agreement about the delivery conditions in the fourth quarter. Paper mills started pushing late but vehemently for price hikes, or floating the idea of energy surcharges. The general market environment remains difficult, but the conditions of business deals cannot be loss-making, say representatives of the paper industry.

The price trend for recycled corrugated case material in October is still unclear. While some producers are already negotiating further mark-ups, other players expect stable prices. Sellers point to increased energy

costs as the main reason for the latest announcements. In the German market for GC 2, it is still not entirely evident whether the price announcements from cartonboard producers are meant to lay the groundwork for the annual talks with the folding cartons industry, or whether actual steps could already take place in the fourth quarter. Given the low capacity utilisation rates and unspectacular demand for folding boxboard, quite a few buyers believe this is an attempt by cartonboard producers to fend off potential price pressure.

Energy costs weigh heavily on publication paper mills

In the German market for LWC and SC paper, some paper mills were relatively late in announcing their desired pricing in the negotiations for the fourth quarter. In a few cases, a special energy surcharge was being discussed. Paper industry representatives stress the need to offset rising production and logistics costs.

Demand, which is slightly better at the moment but generally in a phase of structural decline, is only providing minimal support for the paper producers' plans. Especially in the market for LWC, there has been a lack of positive impetus for far too long, say observers.

EUWID Price Watch Germany			
September 2026			
Prices in € per tonne free delivered unless otherwise stated	September 2026	August 2026	September 2025
Fine paper			
Woodfree uncoated			
A4 C-grade, branded paper	810 - 900	810 - 920	800 - 900
A4 C-grade, non-branded paper	780 - 810	780 - 810	790 - 850
Offset sheets 80 g	890 - 970	890 - 990	920 - 1,010
Offset reels 80 g	870 - 930	870 - 940	890 - 950
Woodfree coated			
Sheets, double coated, 100 g	880 - 960	880 - 970	920 - 1,010
Reels, double coated, 100 g	870 - 910	870 - 920	880 - 930
Publication paper			
Newsprint 45 g (coldset)	600 - 635	600 - 635	585 - 610
Newsprint 42.5 g (coldset)	610 - 645	610 - 645	595 - 620
Newsprint 45 g (heatset)	610 - 650	610 - 650	580 - 610
LWC offset 60 g	795 - 840	795 - 840	770 - 805
SC offset 56 g (A)	675 - 695	675 - 695	670 - 695
SC rotogravure 56 g (A)	675 - 705	675 - 705	670 - 695
Corrugated case material			
Primary fibre corrugated case material			
Unbleached kraftliner from Scandinavia 175 g	1,050 - 1,070	970 - 990	870 - 910
Semi-chemical corrugated medium ¹⁾	815 - 1,080	815 - 1,080	795 - 1,000
White-top kraftliner 140 g	1,210 - 1,290	1,150 - 1,230	1,090 - 1,170
Recycled corrugated case material			
Schrenz	700 - 710	640 - 650	560 - 580
Wellenstoff	730 - 740	670 - 680	590 - 610
Testliner 2	760 - 770	700 - 710	620 - 640
Testliner 3	740 - 750	680 - 690	600 - 620
White-top testliner, coated	930 - 950	930 - 950	930 - 950
White-top testliner, 140 g, ISO 70-75	850 - 865	810 - 825	810 - 825
Cartonboard			
Unlined chipboard	815 - 835	815 - 835	815 - 855
GD 2	870 - 940	870 - 940	890 - 960
GC 2	1,140 - 1,195	1,140 - 1,195	1,220 - 1,255

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

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In light of the oversupply of coated and uncoated magazine paper, printing companies often entered negotiations envisioning stable prices. Buyers surveyed by EUWID said that object deals had also been possible until now with prices that were, as usual, below the “official” market prices. A few market experts said this was also true for larger contracts that had been negotiated relatively early on. Against this backdrop, the printing industry believes there is no reason for prices of LWC and SC paper to rise. Overall, the mills’ pricing plans are meeting with considerable resistance.

However, the paper industry is adamantly sticking to its demands, EUWID was told. For one thing, they say, players had done a lot to reduce supply. For example, UPM started producing newsprint at its Caledonian LWC paper mill, which reduces the capacity for coated magazine papers. Similarly, Perlen and Sappi had added further products to the portfolios of their LWC machines. Moreover, the high energy costs were such a burden that there was no alternative but to pass them along, suppliers told EUWID. There appear to be two potential approaches here: a general price increase or a special energy surcharge.

Publishing houses and advertisers repeatedly emphasise the predicament that media companies find themselves in. The structural shrinking demand for magazines and paper advertising is being accelerated by AI, they say. High paper prices and production costs are fuelling this trend, say buyers, who plead for a roll-over of the existing LWC and SC paper prices. Print customers are price-sensitive when placing orders, they argue. So if prices rise, even existing projects would see volume adjustments, they believe.

In several cases, the price round between paper producers and printing companies had not yet been concluded by the first days of October. The outcome is still up in the air, say market experts.

Some corrugated case material producers mulling second price step in October

After prices rose for brown recycled corrugated case material and uncoated white-top testliner in September, it relatively quickly became apparent that this step may not be sufficient. Paper mills argue that the demands that led to the hikes in September were presented at a time when the full magnitude of the exploding energy costs was not yet foreseeable. The hike implemented in September only partially offset this development, they said. However, during the EUWID market survey in late September, there were not yet any signs that paper producers were taking a uniform approach.

Some companies said they had not presented pricing announcements to the market for October, but were discussing a further mark-up in their conversations with customers. Other players surveyed as of the afternoon of 30 September told EUWID they were expecting stable prices in October and were not presenting or negotiating any new demands. There were also reports that pricing notices were sent out for October, but further details could not be determined in the EUWID survey of market participants.

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The only grade with unchanged prices in September was coated white-top testliner. Producers say their aim for October is to realise the necessary step here as well. When the EUWID survey was conducted in the last days of September, it was not yet clear which direction prices would be heading in October. In this context, respondents also mentioned the pending takeover of the RDM Arnsberg mill by Mayr-Melnhof, saying that GD liner is being used as a substitute for coated white-top testliner.

Capacity utilisation at the paper mills is still described as good. However, the industry continues to speculate whether this is due to actual high order intake from European and international customers or to slower running speeds on the paper machines. The German corrugated board market, at least, is not seeing the kind of demand that would lead to high capacity utilisation.

Price hikes for recycled cartonboard are being negotiated

During September, producers of recycled cartonboard issued calls for price hikes as of October. The buyers and sellers in Germany were still negotiating the implementation of this step when the market survey was conducted in calendar week 40. According to EUWID information, most of the price hike announcements were within a range of €70-80/t, but in rarer cases could be even higher. Market experts say the envisaged mark-ups for white-lined chipboard (WLC) and unlined chipboard are primarily cost-driven. In particular, the high energy and logistics costs are “no longer bearable,” so suppliers feel forced to pass these along in the supply chain.

Sources in the cartonboard industry expressed some optimism about being able to implement part of these increases for GD 2 and unlined chipboard in the near future. Packaging companies told EUWID they did acknowledge recycled board producers’ need to offset rising production costs, but said they would try to argue against the hikes by citing muted demand.

EUWID Price Review Germany				
Third quarter 2026				
Prices in € per tonne free delivered unless otherwise stated	Third quarter 2026		Second quarter 2026	Third quarter 2025
Fine paper				
Woodfree uncoated				
A4 C-grade, branded paper	810	- 920	800	- 940
A4 C-grade, non-branded paper	780	- 810	790	- 890
Offset sheets 80 g	890	- 990	930	- 1,050
Offset reels 80 g	870	- 940	890	- 980
Woodfree coated				
Sheets, double coated, 100 g	880	- 980	900	- 1,050
Reels, double coated, 100 g	870	- 940	880	- 950
Publication paper				
Newsprint 45 g (coldset)	600	- 635	585	- 610
Newsprint 42.5 g (coldset)	610	- 645	595	- 620
Newsprint 45 g (heatset)	610	- 650	585	- 610
LWC offset 60 g	795	- 840	795	- 805
SC offset 56 g (A)	675	- 695	670	- 695
SC rotogravure 56 g (A)	675	- 705	670	- 695
Corrugated case material				
Primary fibre corrugated case material				
Unbleached kraftliner from Scandinavia 175 g	970	- 1,070	850	- 930
Semi-chemical corrugated medium ¹⁾	815	- 1,080	775	- 1,020
White-top kraftliner 140 g	1,150	- 1,290	1,070	- 1,170
Recycled corrugated case material				
Schrenz	640	- 710	640	- 630
Wellenstoff	670	- 740	670	- 660
Testliner 2	700	- 770	700	- 690
Testliner 3	680	- 750	680	- 670
White-top testliner, coated	930	- 950	890	- 950
White-top testliner, 140 g, ISO 70-75	810	- 865	810	- 845
Cartonboard				
Unlined chipboard				
GD 2	815	- 835	775	- 855
GC 2	870	- 940	870	- 960
GC 2	1,140	- 1,195	1,140	- 1,275

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

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Industry insiders said that, especially for GD 2, they were also negotiating a potential two-step solution. Therefore, there is reportedly a possibility that a further upward step might come later. According to buyers and sellers, this could depend on factors such as the development of energy prices in the fourth quarter and the price steps implemented as of October. In the early days of October, it was not yet possible to get a clearer picture of the success of this price round.

There are still varying reports from suppliers about capacity utilisation on GD board machines. Additional demand can apparently be met on short notice, with delivery times averaging 2-4 weeks. The machines making unlined chipboard reportedly have weaker bookings.

In the folding boxboard (FBB) market, relevant suppliers have also made price hike announcements – sometimes focused on 1 October and sometimes as of 1 November. Market participants noted, however, that quite a few contracts for GC 2 board are binding until the end of the year. They thus opined that the announcements may be intended to lay the groundwork for the upcoming annual talks, without adjusting the existing contracts in the fourth quarter.

Simultaneously, some observers surmised that this may be a tactical move on the part of cartonboard producers to get one step ahead of potential price pressure and obviate the need to discuss price reductions at the turn of the year.

At the start of the fourth quarter, it was still unclear what the reason was for the long delivery times for FBB from Scandinavia. Industry experts still report lead times of 8-10 weeks, which are increasingly being called into question in light of the demand situation and utilisation rates at FBB mills. The long delivery times are mainly affecting customers who need to shift volumes following the closure of the two Folbb mills.

The buyers surveyed by EUWID were uncertain about the extent to which they could potentially pass along any additional cartonboard costs in their own prices for folding cartons. They point to the ongoing tough market situation. Packaging producers gave mixed assessments of demand for packaging towards the start of the fourth quarter. While some reported relatively good bookings thanks to orders from the food segment, others talked about ongoing fierce competition in the folding cartons industry, which often resulted in less-than-ideal activity levels and shifting volumes.

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Aspapel warns of rising energy costs and growing competitive pressure

Value of paper and board exports falls by 9.5 per cent

📄 **EUWID +** 07 October 2026 | Published in issue 41/2026

Spanish pulp, paper and board association Aspapel is warning of a growing double burden on the sector. Significantly higher energy costs are being compounded by increasing competitive pressure, both within Europe and from suppliers in third countries.

According to the association, the effects of the difficult market and cost environment are already evident in production and foreign trade figures for the first half of 2026. Spanish paper and board production fell by 3.2 per cent year-on-year, while pulp production was 3.9 per cent lower.

The decline was even more pronounced in exports. Citing data from the Spanish tax authority Aeat, Aspapel reports that paper and board exports fell by 5.7 per cent in volume terms. Their total value declined by 9.5 per cent, while the average export price per tonne fell by 4 per cent.

For pulp, export volumes decreased by 10.3 per cent, while the value of exports fell by 14.7 per cent. The average export price per tonne declined by 4.9 per cent.

The development is particularly significant for the Spanish industry given the importance of export markets. According to Aspapel, Spain exported 41 per cent of its paper and board production and 56.9 per cent of its pulp output in 2025.

Energy costs weigh on competitiveness

Since the start of the crisis in the Middle East, gas prices have been significantly above the levels seen in recent years, according to Aspapel. The association reports increases of at least 50 per cent, with prices at times almost 100 per cent higher.

According to estimates by the Alliance for the Competitiveness of Spanish Industry, of which Aspapel is a member, higher gas and electricity prices could add around €7.4bn to the energy costs of Spain's manufacturing industry by the end of 2026. The Alliance estimates that around 70 per cent of this burden could arise between September and December alone.

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Aspapel also sees additional competitive pressure within Europe. According to the energy cost barometer published by Spanish energy-intensive industry association Aege, and taking account of government support measures, the final electricity price for a comparable energy-intensive consumer in France is 28 per cent below the Spanish level. In Germany, the corresponding difference is 13 per cent.

Imports from Turkey and China increase sharply

Alongside declining exports, imports from third countries have become more significant. Although total Spanish paper and board imports fell slightly by 0.6 per cent in volume terms in the first half of the year, imports from individual countries increased substantially.

Imports from Turkey rose by 48.5 per cent and accounted for 12.1 per cent of imports from non-EU countries. Deliveries from China increased by 26 per cent, reaching a share of 18.3 per cent. Overall, imports from Asia excluding Turkey rose by 42.5 per cent.

Aspapel sees this as a further argument for a more competitive cost structure for Spanish industry, both within the European market and in competition with producers from third countries.

Association calls for support for heat-intensive industry

In the short term, Aspapel is calling for measures to cushion the impact of high energy costs on production costs. In the medium and long term, the association is advocating a dedicated framework for heat-intensive industries, comparable to the existing framework for electricity-intensive consumers.

According to Aspapel, such a framework should cover both gas and biomass users and support investment in the technological adaptation of industrial plants as well as the gradual replacement of fossil fuels with renewable alternatives. The aim would be to advance decarbonisation without undermining industrial competitiveness.

Aspapel represents companies accounting for around 95 per cent of Spanish pulp, paper and board production. The country's pulp, paper and board industry comprises a total of 72 mills and generated sales revenues of approximately €5.1bn in 2025.

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Estimated additional energy costs for the Spanish industry in 2026 in €bn			
Period	Gas	Electricity	Total
March-August	1.45	0.89	2.34
September-December	2.77	2.29	5.06
Total	4.22	3.18	7.40
Estimates based on TTF, OMIE and REE data as well as futures prices as of 15 September 2026			
Source: Aspapel, citing Alliance for the Competitiveness of Spanish Industry			

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Less paper collected for recycling in Europe in 2025

📄 **EUWID +** 07 October 2026 | Published in issue 41/2026

The amount of recovered paper collected in Europe fell slightly in 2025. According to EPRC figures published by Cepi, the amount of material collected in the EU, the UK, Norway and Switzerland declined by 0.3 per cent year-on-year to 53.9 million t. Paper and board consumption fell by 0.4 per cent to 70.5 million t over the same period.

As recycling volumes and paper and board consumption fell at broadly the same rate, the recycling rate remained unchanged at 76.4 per cent. The rate compares the amount of used paper recycled, including net trade in paper for recycling, with consumption of new paper and board. The 2025 figure thus remained above the voluntary industry target of 76 per cent set for 2030 under the European Declaration on Paper Recycling.

The recycling rate has risen markedly over the longer term, climbing from 40.3 per cent in 1991 to 51.8 per cent in 2000 and 71.9 per cent in 2010. It stood at 72.8 per cent in 2020 and reached 79.3 per cent in 2023.

The number of European countries with recycling rates above 70 per cent rose from 17 in 2024 to 20 in 2025. Meanwhile, the number with rates below 60 per cent fell from five to three. Germany recorded a recycling rate of 80 per cent in 2025, according to figures from the German paper industry association, Die Papierindustrie.

Paper and board packaging had the highest recycling rate of any packaging material in the EU in 2023. According to Eurostat figures cited by the EPRC, the rate stood at 87 per cent, compared with 77.2 per cent for metal, 74.9 per cent for glass and 41.7 per cent for plastic. In absolute terms, more paper and board packaging was recycled than all other packaging materials combined, according to the EPRC monitoring report.

Europe remains the world leader in paper recycling, with a recycling rate of 76.4 per cent, compared with 67 per cent in North America and 60.3 per cent in Asia. Paper fibres went through an average of 4.2 recycling and use cycles in Europe in 2025, compared with a global average of three cycles in 2024.

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New push for end-of-waste status for recovered paper: pilot project starts in October

Germany and Austria test joint quality assurance system

🔗 **EUWID +** 07 October 2026 | Published in issue 41/2026

The paper and waste management industries in Germany and Austria are launching a fresh attempt to establish end-of-waste status for recovered paper. A joint pilot project will seek to develop a practical quality assurance system, using the quality requirements of EN 643 as a benchmark, that could serve as the basis for more end of waste rules. Martin Drews of German paper industry association Die Papierindustrie announced the initiative at the Gesellschaft für Papier-Recycling (GesPaRec) recovered paper conference in Rüsselsheim at the end of September.

According to Mr Drews, the joint pilot project will start on 5 October. Participants on the German side include the paper industry and waste management associations BDE and Bvse, while Austria is represented by Austropapier and associations from the waste management sector.

The partners aim to develop a system that is easy to implement and cost-efficient and that could, where possible, build on existing structures, Mr Drews explained. The system should provide transparent evidence that individual recovered paper consignments, for which end-of-waste status is claimed, actually meet the relevant requirements. The jointly developed concept is then to be discussed with the environment ministries in Germany and Austria, with the aim of paving the way for an end-of-waste regime.

The Dutch association has also signalled its support, Mr Drews said, adding that the initiative should be developed with a European perspective from the outset.

The participants intend to agree the further timetable at the kick-off meeting. Implementation should take place as quickly as possible in order to take advantage of the current circular economy policy initiatives.

Mr Drews sees an opportunity in particular in the EU's planned Circular Economy Act, which is also expected to address end-of-waste rules. A concept backed by both the paper and waste management industries could help provide policymakers with concrete solutions.

Bvse sees potential for relief across the value chain

Andreas Otto of Bvse highlighted the benefits of an end-of-waste regime at the event. In addition to improving the status of recovered paper as a raw material and strengthening the value chain as a whole, he pointed in particular to

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potential to reduce the administrative burden on cross-border shipments. If recovered paper ceases to be classified as waste, this would also remove the requirements under the Digital Waste Shipment System (Diwass) and those associated with the Annex VII accompanying document. Mr Otto said both suppliers and paper mills could benefit. Requirements relating to contracts, confirmation of receipt and recovery, and the associated responsibilities affect several parties in the supply chain. However, recovered paper could only be shipped outside the waste regime if end-of-waste status were recognised both at the point of dispatch and at the destination.

Mr Otto rejected concerns that waste management companies would automatically face additional product liability risks once recovered paper had achieved end-of-waste status. Product liability law primarily covers damage to life, physical integrity or health as well as certain types of property damage in the private sphere, he said. Deliveries of recovered paper to paper mills, by contrast, are business-to-business transactions. End-of-waste status would therefore not in itself create new product liability towards an industrial customer merely because the material had acquired product status, he added.

Mr Otto also pointed to benefits beyond cross-border trade. He said permitting could be simplified for plants using the material, as they would no longer need to be authorised as waste treatment facilities.

Practical implementation would nevertheless require organisational adjustments at plants. This would include keeping qualifying material separate from recovered paper that continues to be classified as waste and ensuring continued compliance with the relevant requirements.

Paper industry calls for verifiable quality assurance

Thomas Greitenevert of paper producer Palm said recovered paper could only be granted product status if suppliers had a verifiable quality assurance system in place. "End-of-waste status does not come for free," he stressed. A quality assurance system would have to document how the requirements of EN 643 were actually being met. Compliance would have to be documented throughout the process, from material intake and internal operations to dispatch. Evidence should be provided by the supplier rather than being established only through checks at the paper mill.

Mr Greitenevert pointed to non-paper materials and contaminants that paper mills encounter in practice. Suppliers seeking product status for recovered paper would have to use appropriate controls and documentation to ensure that the agreed quality was consistently met. Procedures could be adapted to different material streams and make use of existing certifications or operational systems. For grades in EN 643 groups 1 to 4, there would have to be a clear record of how quality checks were carried out.

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Mr Drews also stressed that the approach would be voluntary. No company should be forced to seek end-of-waste status for its recovered paper. There would continue to be a market for grades that did not meet the relevant requirements. The aim was to provide companies with an additional option, and each business would have to decide for itself whether to use it.

End-of-waste criteria have already been established in the German states of Bavaria, Lower Saxony and North Rhine-Westphalia. However, the Federal Environment Ministry would need to be brought on board for a nationwide solution. The existing arrangements in individual states are based on administrative decrees and have created a regulatory patchwork, Mr Drews said. In previous discussions, the German Environment Ministry had called in particular for robust evidence that EN 643 requirements were actually being met in practice. Simply stating that recovered paper had met the specifications was not sufficient.

Remondis warns of additional costs

Fredrik Jastremski of Remondis warned against making documentation and quality assurance requirements too complex. Waste management companies already supplied material that largely complied with the relevant grade specifications, meaning the main task was to provide evidence of this using simple and cost-efficient procedures. As one possible tool, he cited AI-based image recognition. Images taken at dispatch and on receipt could be used to verify compliance with the agreed quality specifications.

A national harmonisation could only be an interim step towards a European solution, Mr Jastremski added. If German companies were required to demonstrate quality using particularly complex and bureaucratic procedures while businesses in other countries faced simpler requirements, this could create competitive disadvantages. Additional costs could ultimately also make recovered paper more expensive.

Cepi also supports EU-wide end-of-waste criteria for recovered paper in principle. However, the European paper industry association says product status should be limited to recovered paper from separate collection that complies with EN 643 and is delivered directly to a paper mill without further mixing. Cepi also calls for a quality management system to verify compliance with both EN 643 and relevant product legislation. Final recycling should continue to take place at the paper mill.

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Pack UK completes first full year of UK packaging EPR

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Pack UK, the scheme administrator for the UK's extended producer responsibility system for packaging, has completed the first full year of operation of the UK's extended producer responsibility scheme for packaging (EPR), establishing the core structures and processes needed to administer producer fees, make payments to local authorities and prepare for recyclability-based fee modulation.

According to its annual report for the period from 1 April 2025 to 31 March 2026, Pack UK established its governance and reporting structures, published producer base fees, issued the first notices of liability and set up the systems for collecting fees and distributing funds to local authorities.

The scheme administrator also continued work on the recyclability assessment methodology (RAM), which will determine how packaging recyclability affects future EPR fees. RAM 2027 was subsequently published on 1 July 2026 and places greater emphasis on actual collection and recycling outcomes.

Another key step was the appointment of UK Packaging PRO as the scheme's Producer Responsibility Organisation. Its formal appointment took effect on 1 April 2026, with functions to be transferred gradually. Pack UK will retain responsibility for key decisions, including producer fees and local-authority payments.

Defra closes funding gap to avoid EPR fee recalculation

Financially, Pack UK raised around £1.41bn in waste disposal fees from obligated producers and paid around £1.34bn to local authorities during the year. Defra provided an additional £102m on an exceptional basis after revised producer data reduced obligated packaging tonnage and created a funding shortfall. The intervention meant Pack UK did not have to recalculate producer fees upwards in the first scheme year.

The first year was also marked by operational problems. In December 2025, a direct debit error resulted in some producers being charged three times. Around 11 per cent of obligated producers were affected, with total overcharges of £143m. Pack UK said the payments were refunded within days and that system and procedural changes had been introduced to prevent a recurrence.

According to Pack UK, the next phase will shift the focus from implementation towards longer-term environmental outcomes. Its forthcoming five-year strategy is intended to guide work through to 2031, including fee modulation,

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improved recyclability, more efficient collection and recycling services, infrastructure investment and behaviour-change campaigns.

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Net-zero emissions possible by 2050, but €80bn and supportive policies needed, says Cepi

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Europe's pulp and paper industry could reach net-zero emissions by 2050, but doing so would require an estimated €80bn in investment and better access to competitively priced fossil-free energy, according to a study by Vision Hunters for industry association Cepi. In the new outlook, electrification is expected to become the main driver of further reductions after 2030. Other measures include process improvements, fuel switching and technologies such as carbon capture, utilisation and storage.

Cepi reports that direct CO₂ emissions had fallen by approximately 30 per cent by 2025, putting the pulp and paper industry ahead of the trajectory envisaged in its earlier 2011 roadmap. Cleaner energy, improved efficiency and modernisation have driven the reduction. However, the study also highlights the contribution of structural changes: since 2011, European paper and board capacity has declined by around 9 million t, while production has fallen by 14 million t. Closures of older graphic (fine and publication) paper mills have helped lower emissions.

The original 2011 roadmap explored an 80 per cent reduction in emissions by 2050 compared with 1990. This covered direct emissions, emissions from purchased electricity and transport, with combined emissions modelled to fall from 60 million t to 12 million t of CO₂. In 2011, the European pulp and paper industry represented by Cepi had 659 companies with 983 mills and 1,364 paper and board machines. In 2025, the industry counted 620 companies, 740 mills and 1,142 paper and board machines.

Electrification is the key, biggest potentials in non-integrated mills

While fuel switching delivered most emission reductions over the past decade, the next decarbonisation phase will rely primarily on electrification as fossil-free electricity becomes more widely available and new technologies reach commercial scale. The greatest remaining reduction potential lies in non-integrated or stand-alone paper mills relying on natural gas. Together, these account for more than 55 per cent of the sector's capacity and almost 75 per cent of its current greenhouse gas emissions, according to the Vision Hunters study. Key measures include heat pumps at recycled paper and board mills, and equipment replacement, fuel switching and electrification at fresh-fibre paper and board mills. Chemical pulp mills offer additional potential through the capture and storage of biogenic CO₂, with annual carbon removals estimated at 2.5 to 10 million t of CO₂-equivalents by 2050.

Investment requirements are estimated to reach €5bn by 2030, €50bn by 2040 and €80bn by 2050. Cepi warns that the remaining emissions will be harder and more expensive to eliminate. Progress will depend on energy availability,

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expanded electricity grids, CO2 transport and storage infrastructure, and supportive policies.

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Refresco France considers to close plant

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Beverage bottler **Refresco France** is considering closing its French site in La Roche-sur-Foron, which specialises in the production of juices in carton packaging. The move is due to a significant and sustained decline in demand in the French market for fruit juices and nectars, as well as a shift in consumer preferences away from carton packaging, the company says. The remaining production volumes from La Roche-sur-Foron are to be gradually distributed amongst the group's other plants, primarily to Nuits-Saint-Georges and Le Quesnoy.

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Saica invests in die-cutting technology at Ashbourne site in Ireland

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Saica has commissioned a new rotary die cutter at its corrugated packaging plant in Ashbourne, Ireland. The company cited, among other factors, growing demand for efficient and automated packaging solutions as a reason for the investment. The company operates five sites across the island of Ireland. Ashbourne is one of the group's key production sites in the country.

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Felix Schoeller mulls biomass plant

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German decor and speciality paper manufacturer **Felix Schoeller** is planning to build a biomass power plant at its Osnabrück-Lüstringen site for in-house steam and electricity consumption. The envisaged power plant will use waste wood as fuel and will be rated to generate around 30 MW.

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Graphic Packaging appoints new Chief Accounting Officer

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Graphic Packaging Holding Company has appointed **Aditya Gandhi** as Vice President and Chief Accounting Officer with effect from 28 September. Gandhi was Chief Accounting Officer at the Aptar Group. Prior to that, he spent five years at Sonoco Products Company and held senior positions at Westrock.

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Russ Torres leaves Kimberly-Clark

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At US hygiene products manufacturer **Kimberly-Clark**, a number of management changes are on the horizon following the planned acquisition of Kenvue. Among other things, President and COO Russ Torres will be leaving the company in November. His responsibilities relating to the integration of the North American feminine hygiene products manufacturer Kenvue are to be distributed amongst several managers in future. Carlos De Jesus, who is currently Kenvue's manager for North America, is set to take charge of the North American business once the transaction is completed. In the EMEA region, Leonardo Curado is set to take over the reins from January 2027. The completion of the Kenvue acquisition, valued at around US\$40bn, is expected in the fourth quarter of 2026.

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Competition authority clears RDM Arnsberg takeover

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From the perspective of the German competition authorities, there are no obstacles to the planned acquisition of Reno de Medici's (RDM) Arnsberg cartonboard mill by Mayr-Melnhof (MM). On 24 September, the German Federal Cartel Office gave the go-ahead for the deal.

In mid-August, the two companies had announced plans for MM Board & Paper to acquire the mill as part of an asset deal. According to earlier statements, the companies expect the transaction to be completed in the fourth quarter of 2026.

The Arnsberg cartonboard plant has an output capacity of around 230,000 tpy of recycled cartonboard and is specifically designed for the production of GD liner. MM described the planned takeover as an investment in its core business, from which it expects to derive synergy effects in the coming years. The plant is strategically located close to its Neuss mill, where the group converted BM 5 to liner production a few years ago.

The RDM Group currently operates eight board mills, three of which are in Italy, two in the Netherlands, and one each in Germany, Spain and Sweden. Total production capacity stands at almost 1.4 million tpy of recycled cartonboard.

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Suzano to increase pulp prices

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Brazilian pulp producer **Suzano** plans to increase prices for bleached eucalyptus kraft pulp (BEK) in global markets. October prices are set to rise by \$50/t in Europe and the Americas, and by \$20/t for customers in Asia, the company announced.

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Elisabet Alier returns as president of Aspapel

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Spanish Paper Association **Aspapel** has appointed **Elisabet Alier**, Corporate Director of Sustainable Growth at Alier, as its new president. She succeeds Jordi Aguiló of Ence and thus returns to the position at Aspapel which she previously held from 2020 to 2022. **Miguel Ángel Tapiador**, CEO of Iberpapel, was appointed vice president. He succeeds Miguel Ángel Jiménez of Saica Paper.

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Mondi sells two former Schumacher Packaging plants

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As part of efforts to optimise its site network, Mondi is divesting two converting plants in Germany, in Bielefeld and Leipzig, a group spokesperson confirmed to EUWID. The Austrian paper and packaging producer took over both sites as part of its acquisition of Schumacher Packaging's Western European operations.

The plant in Bielefeld changed hands with effect from 1 October 2026 and is now owned by German folding box and packaging manufacturer ASS GmbH friedrichs druck + verpackung. A spokesperson for the company confirmed the acquisition to EUWID. She said the deal would expand ASS's capacities in the folding carton and POS segments, she added.

The sale of the Leipzig plant to MEP Holding is still pending. Mondi said an agreement on the sale has already been reached and that the transaction is expected to be completed in the coming weeks, subject to customary closing conditions. According to earlier information, the former Schumacher plant in Leipzig converts solid board.

Mondi did not disclose any transaction values. The group said the divestments supports its strategy of increasing site specialisation, streamlining its product portfolio and focussing on areas where it can create the greatest value for customers.

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Insolvency proceedings for Mayer Kartonagen opened

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Following its provisional insolvency filing in July, full insolvency proceedings have been initiated for German company Karl Mayer Kartonagenfabrik. The local court of Tübingen issued the opening order on 1 October and appointed Dr Sebastian Mielke as insolvency administrator. The Menold Bezler lawyer had previously served as provisional insolvency administrator.

Packaging production is continuing as normal for the time being during the insolvency proceedings, a spokesperson for the insolvency administrator told EUWID. According to earlier information, no redundancies are planned for the company's 110 employees.

The investor process launched before the insolvency filings is also continuing. Talks are currently underway with several interested parties, the spokeswoman added.

Mayer Kartonagen produces board packaging for commercial and industrial customers. In addition to the company headquarters, the company has a packaging site in Ottersweier and a warehouse in Altensteig-Spielberg.

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