

Norske Skog rebuilds PM 6 at Saugbrugs mill for kraftliner and SC paper, PM 4 and 5 to be shut down

EUWID + 08 October 2026 Bernd Hecht | Published in issue 42/2026

Norske Skog has decided to convert the decommissioned PM 6 at its Saugbrugs mill in Norway to produce TMP-based kraftliner and SC paper, with a view to bringing it into operation in the first half of 2028. PM 4 and 5, which are currently in operation and produce SC paper, will be decommissioned once the converted PM 6 comes on stream. To complement the Halden site, Norske Skog is exploring the possibility of establishing a data centre with a capacity of 80–100 MW alongside its ongoing fibre processing operations. Norske Skog estimates the cost of converting PM 6 at around NOK850m.



Norske Skog's Saugbrugs mill will enter the kraftliner market in 2028

PM 6, which has been out of operation since the rockslide in April 2023 and currently has a capacity of 260,000 tpy of SC paper, will have a flexible production capacity of around 300,000 tpy of TMP-based kraftliner or approximately 230,000 tpy of SC magazine paper following the conversion. Norske Skog explains that PM 6 is expected to incur significantly lower costs than PM 4 and 5 thanks to more efficient energy consumption, an optimised production process and reduced staffing requirements. The primary fibre kraftliner produced on PM 6 is aimed at the low-grammage product segment for lightweight packaging solutions suitable for food-contact applications, the company says.

The two paper machines, PM 4 (100,000 tpy) and PM 5 (110,000 tpy), both produce SC paper. They are to be decommissioned following the start-up of the refurbished PM 6, without causing any disruption to customer supplies.

As part of the restructuring of the Saugbrugs site, Norske Skog has sold parts of the Saugbrugs paper mill site to the Norwegian Authority for Decommissioning of Nuclear Facilities and Disposal of Radioactive Waste (NND). The proceeds from the sale amount to NOK770m, of which NOK400m will be used to repay short-term liabilities. Norske Skog intends to use the remaining funds to improve its liquidity. The sale comprises parts of the site adjacent to the

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research reactor in Halden, as well as the production hall housing the two paper machines, PM 4 and PM 5.

Norske Skog Saugbrugs may continue to use these areas for the operation of the two machines until the second half of 2028. They will be leased back until the handover in 2028.

The company also plans to sell the PM 6 production hall and the land, and to enter into a lease agreement for these assets. The sale of the administrative building is also being considered.

Norske Skog points to the growing market for fibre-based packaging as the reason for its decision to expand its product portfolio to include TMP-based kraftliner. The company already operates in the market for recycled corrugated case material with paper machines at its Bruck plant (210,000 tpy) in Austria and in Golbey (550,000 tpy), France.

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RYAM suspends production at Temiscaming pulp and board mill

09 October 2026 [Published in issue 42/2026](#)

US Specialty pulp producer Rayonier Advanced Materials (RYAM) has indefinitely idled production at its Temiscaming pulp and board mill in Québec, Canada.

Canadian trade union Unifor reported that "after weeks of uncertainty and an initial postponement of the shutdown", production has officially come to a halt on 4 October. Around 300 workers are affected by the stoppage. A small number of employees will remain on site to maintain essential operations, the trade union says.



The Témiscaming mill produced high-yield pulp and folding boxboard

RYAM had originally planned to halt production already on 15 September. However, additional orders allowed operations to continue until 3 October.

The Témiscaming mill has a capacity of 180,000 tpy of folding boxboard as well as 290,000 tpy of hardwood-based high-yield pulp, of which around 60,000 tpy were used internally. The mill also used to produce high purity cellulose in the past, but production was permanently discontinued in the first quarter of 2026.

When announcing the shutdown in early August, RYAM explained that market conditions for both pulp and folding boxboard were difficult. These difficulties were exacerbated by the additional US tariffs imposed on Canadian goods. According to the company, around 75 per cent of the board produced in Témiscaming was exported to the US.

Unifor is watching with concern as the number of production curtailments across the Canadian forestry sector continues to grow. The trade union said it was not giving up on the Temiscaming site.

"Several scenarios are currently on the table to secure the future of the mill and restart operations," it said, adding that these options would now be explored.

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KCPM's mill near Kyiv halts production following attack

🔗 **EUWID +** 13 October 2026 [Alexander Ungemach](#) | Published in issue 42/2026

Ukraine's Kyiv Cardboard and Paper Mill (KCPM) was hit by a missile strike on 7 October, the third attack on the mill in six months. The explosions caused fires, forcing the mill to suspend production. "Despite the significant material damage, we are above all relieved that none of our employees, who followed the safety procedures, were injured," the company said in a statement.

"Unfortunately, we are not yet able to assess the extent of the damage and its consequences. Only once the fire has been completely extinguished will

we be able to begin assessing the damage and determine which equipment and facilities remain intact and which will need to be replaced. However, it is already clear that substantial parts of the operational infrastructure, particularly buildings, technical equipment and utility networks, have been severely damaged," the company told EUWID in response to an enquiry.

Kyiv Cardboard and Paper is a producer of corrugated case material, cartonboard, corrugated packaging and tissue products. In 2025, the company produced around 50,000 t of tissue paper, 155,000 t of corrugated case material and cartonboard, and around 276 million m² of corrugated packaging. The site's designed production capacity is higher, though, standing at 90,000 tpy of sanitary and household paper from recycled and fresh fibres, 220,000 tpy of corrugated case material and cartonboard, as well as up to 335 million m² of packaging.



The Kyiv Cardboard and Paper Mill has been hit by missile strikes three times in six months.

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USDOC determines final dumping margin for The Navigator Company

13 October 2026 [Published in issue 42/2026](#)

On 6 October, the US Department of Commerce determined a definitive dumping margin of 2.70 per cent on exports of fine paper by The Navigator Company (TNC), thereby confirming the provisional finding from June this year.

In the annual review of existing anti-dumping measures, covering the period from 1 March 2024 to 28 February 2025, it was found that TNC's uncoated woodfree paper deliveries were being sold below their normal value.



TNC must now first lodge a cash deposit of 2.70 per cent of the relevant customs value for the affected paper shipments. For TNC's imports into the US during the investigation period from March 2024 to February 2025, the US authorities will then calculate the final duty amounts on an importer-specific basis. TNC's rate is below the general rate of 7.80 per cent and is therefore comparatively moderate. Whether additional payments or refunds will be due depends on the security deposits already provided and the final importer-specific duty calculations.

The original anti-dumping investigation was initiated in 2015. The current administrative review was launched in April 2025, and a provisional decision on this was reached in June of this year.

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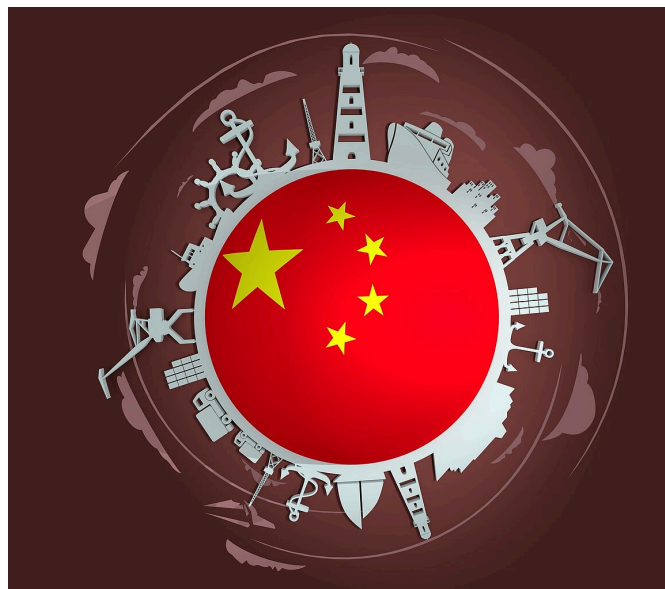
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China's paper and board output outpaces demand as exports rise further

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China's paper and board industry continued to expand production in 2025, but domestic consumption grew at a significantly slower rate. At the same time, paper and board imports fell sharply while exports increased further, according to the China Paper Association's (CPA) annual report for 2025.

China produced 141 million t of paper and board in 2025, an increase of 4 per cent compared with the previous year. Consumption rose by only 2 per cent to 139 million t. Per-capita consumption amounted to 99 kg, compared with around 97 kg in the previous year.



The increase in production and consumption did not translate into improved financial results. Across the pulp, paper and converted paper products industry, sales revenues decreased by nearly 3 per cent to CNY1.42tn (approximately €190bn) in 2025 and aggregate profits fell by 14 per cent to CNY44.3bn (approximately €6bn).

Paper and board manufacturers alone generated revenues of CNY806bn (approximately €107bn). Aggregate profits fell by 7 per cent to CNY23.6bn (approximately €3.2bn). Of the 2,553 paper manufacturers covered by the statistics, 730, or nearly 30 per cent, reported losses.

Linerboard shows strongest growth among major grades

Packaging grades continued to account for the largest share of China's paper and board market. Containerboard production increased particularly strongly, with linerboard rising by 6 per cent and fluting by 3 per cent to a total of 65 million t. Containerboard consumption, however, only went up by 2 per cent to 71 million t. Linerboard and fluting nevertheless remained by far the largest segments, together accounting for more than half of total paper and board consumption in China.

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In 2025, the Chinese corrugated industry's dependency on imports also decreased, which is reflected in import reductions of 18 and 15 per cent for linerboard and fluting, respectively. At a combined 6.85 million t, linerboard and fluting accounted for more the two thirds of China's total paper and board imports in 2025.

Growth was more moderate for bleached cartonboard. Production increased by 3 per cent to 18 million t, while consumption rose by 1 per cent to 15 million t. For coated bleached cartonboard, which accounts for the overwhelming majority of the segment, production rose by 2 per cent to 17 million t but consumption increased by just 0.5 per cent to 14 million t.

At the same time, exports of coated bleached cartonboard grades increased by 6 per cent to nearly 3 million t and imports further decreased by 23 per cent to roughly 400,000 t. Bleached cartonboard remains by far the most important export paper grade.

Production and consumption of packaging papers remained broadly at the previous year's level at roughly 8 million t. China continues to be a net importer of packaging paper with an import increase of 13 per cent to 520,000 t, while exports went up by 4 per cent to 260,000 t.

Strong increase in tissue and specialty paper exports

Tissue also continued to expand. Output increased by 4 per cent to 13 million t, while consumption rose by 2 per cent to 11.5 million t. Tissue exports increased by 25 per cent to 1.7 million t.

Specialty paper and board recorded one of the strongest increases in production, rising by 5 per cent to 5 million t. Domestic consumption, however, declined by 2 per cent to under 3 million t, widening the gap between domestic output and demand. Exports here increased by 14 per cent to 2.6 million t.

Printing paper markets largely stable, newsprint decline continues

The development of printing and writing papers was comparatively subdued. Production of uncoated and coated printing paper increased by 2 per cent to 19 million t and 7 million t, respectively. Consumption showed similarly modest growth, increasing by 1 per cent to 18 million t for uncoated printing and writing paper and to 5 million t for coated printing paper.

Exports of both grades increased by around 5 per cent to 1.4 million t for uncoated and 2.0 million t for coated printing paper.

Newsprint continued its structural decline. Production fell by 7 per cent to just 650,000 t, while consumption decreased by 13 per cent to 960,000 t.

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China becomes net exporter of paper and board

The difference between growth in production and domestic demand was also reflected in foreign trade. China exported 12 million t of paper and board in 2025, up 10 per cent year on year. Imports fell by more than 14 per cent to 9 million t. China consequently recorded a net paper and board export surplus of approximately 2.6 million t, after imports and exports had been almost balanced in 2024.

Converted products return to modest growth

Production of converted paper and board products returned to modest growth in 2025 after a sharp decline in 2024. Output increased by nearly 2 per cent to 66 million t, while consumption rose by under 1 per cent to 59 million t.

Exports continued to increase and reached 7 million t, up 10 per cent year on year, while imports declined to just 80,000 t.

China: Production and consumption of paper and board						
million t	Production			Consumption		
	2025	2024	Change %	2025	2024	Change %
Total paper and board	141.35	136.25	+ 4	138.79	136.34	+ 2
Newsprint	0.65	0.70	- 7	0.96	1.10	- 13
Uncoated printing and writing paper	18.75	18.45	+ 2	17.83	17.61	+ 1
Coated printing paper	7.20	7.05	+ 2	5.38	5.33	+ 1
Tissue	13.15	12.60	+ 4	11.50	11.28	+ 2
Packaging paper	7.85	7.75	+ 1	8.11	7.96	+ 2
Bleached cartonboard	17.60	17.15	+ 3	15.09	14.91	+ 1
Coated bleached cartonboard	16.70	16.35	+ 2	14.18	14.11	± 0
Liner	32.15	30.35	+ 6	36.53	35.82	+ 2
Fluting	32.55	31.45	+ 3	34.82	34.07	+ 2
Specialty paper and board	5.10	4.85	+ 5	2.69	2.75	- 2
Others	6.35	5.90	+ 8	5.88	5.51	+ 7
Converted paper and board products	66.18	65.14	+ 2	59.26	58.85	+ 1

Source: China Paper Association

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China: Imports and exports of paper and board						
million t	Imports			Exports		
	2025	2024	Change %	2025	2024	Change %
Total paper and board	9.30	10.87	- 14	11.86	10.78	+ 10
Newsprint	0.33	0.42	- 21	0.02	0.02	± 0
Uncoated printing and writing paper	0.47	0.49	- 4	1.39	1.33	+ 5
Coated printing paper	0.22	0.23	- 4	2.04	1.95	+ 5
Packaging paper	0.52	0.46	+ 13	0.26	0.25	+ 4
Bleached cartonboard	0.41	0.53	- 23	2.92	2.77	+ 5
Coated bleached carton board	0.40	0.52	- 23	2.92	2.76	+ 6
Tissue	0.05	0.04	+ 25	1.70	1.36	+ 25
Liner	4.57	5.60	- 18	0.19	0.13	+46
Fluting	2.28	2.68	- 15	0.01	0.06	- 83
Specialty paper and board	0.15	0.14	+ 7	2.56	2.24	+ 14
Others	0.30	0.28	+ 7	0.77	0.67	+ 15
Converted paper and board products	0.08	0.09	- 11	7.00	6.38	+ 10
Source: China Paper Association						

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Producers push for mark-ups in the German woodfree paper market

No new announcements for kraftliner after September increase

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In the woodfree paper market, some paper mills were relatively late in announcing price hikes as the start of the fourth quarter approached. Demand for uncoated and coated fine paper remains modest, but paper producers explain that they need a price increase because of their cost situation. In some cases, they are considering additional energy and transport surcharges.

Following an upward price step for unbleached kraftliner in September, prices were moving sideways at the beginning of October. The same was true for white-top kraftliner, although the hikes implemented for this grade in September had been somewhat smaller than those for unbleached kraftliner.

Fine paper producers trying to raise prices amid weak demand and soaring costs

On the German market for woodfree uncoated and coated paper, mills are trying to counteract the prevailing pressure with announcements of price hikes. They are calling for hikes of as much as €50/t.

The mood in the paper and printing industry has only improved marginally in recent days. Demand is modest, both presently and with a view to the entire fourth quarter, in the opinion of many players, who note that the overall market environment remains challenging. Most of them share the view that the graphic sector is not really on the road to recovery. There are no signs of an “autumn upswing” or a traditionally strong fourth quarter. Customers often have substantial inventories on hand, therefore order intake is not expected to surge in the coming weeks, respondents say.

Neither paper producers and merchants nor printing companies and publishers are satisfied with their situation, even though they have lowered their expectations in light of the structural demand decline. The earnings situation is dire in many cases and there is a strong need for consolidation and restructuring, market insiders agree.

Respondents in the market unanimously complain about the fossil fuel price crisis, which once again presents difficult-to-assess cost risks. For weeks now, these high prices have been a burden forcing paper mills, printing firms and logistics companies to raise their own prices.

Observers mainly report that paper manufacturers have been making rather gingerly attempts to adjust prices. Buyers confirm that pricing negotiations are taking place. But so far, these have only resulted in successful price

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increases in scattered cases, primarily in the uncoated paper segment. This is also confirmed by paper industry representatives.

In the coated paper segment, there was very little price movement in the market in September and the early days of October. The existing contracts remain valid, with the current price hike announcements for woodfree uncoated and coated papers generally applying only to non-contracted goods or when contracts are valid until further notice – and these deals represent just a small share of the market. Some market experts therefore believe the announcements are an attempt by paper producers to eliminate the so-called special prices from the market and push the general price level towards the upper end of the current range. Others believe this shows that producers are trying to prepare customers for noticeable price increases for the beginning of 2027.

Paper buyers fear that higher paper prices could lead to entire print projects being called into question. Paper industry representatives counter that even if these paper price hikes are implemented, it would not offset the higher costs in production, energy and logistics. Paper mills continue to spill red ink, EUWID was told.

And the development of energy prices and freight costs is uncertain. The structural problems in logistics are now causing a lot of additional complexity and expense. For example, just-in-time deliveries are no longer a given thing, EUWID was told. Paper producers are considering to implement freight and energy surcharges.

At the same time, there is also an ongoing influx of deliveries of cut sizes and folio sheets from overseas, especially from China, Korea and Indonesia. Paper producers from these countries are flooding the European market with low-priced paper, some respondents say. Although the volumes of paper coming from overseas remain modest in the overall market context, these supplies are increasing and thus have a growing influence on pricing in the German market, players agree. It has been clear for some time that Asian paper producers are not merely using the European market as an outlet, but that exporting is becoming an important pillar of their business model. This shift comes in response to the continued overproduction amid insufficient growth in the Asian market.

However, Asian suppliers are likewise facing substantial rises in freight and transport costs, experts point out, adding they expect surcharges will be introduced for overseas goods as well. Other respondents believe there is a real danger that the European market will become increasingly dependent on Asian imports. This is still a long way off, but the tendency is there, they say.

Moreover, there are mixed opinions about the joint venture between UPM and Sappi. In light of the slow decision-making process of the EU competition watchdog, some say the market for woodfree coated paper has fallen into a “shock-induced paralysis.” Some respondents take a highly critical view of the planned tie-up between the two market leaders, while others are losing hope that the JV will go through and lead to a controlled process of consolidation in the market. Since there is a massive oversupply of paper, industry experts are convinced that,

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despite the concerns expressed by the EU, printing companies will have no problems sourcing paper whether or not the JV goes ahead.

Nevertheless, it would provide greater planning certainty for players in the market if the European Commission would send a clear signal soon. Competitors are wondering about the future market conditions and structure, buyers want to know what portfolio the JV would offer and paper merchants need clarity to build sustainable, long-term partnerships.

No new price demands for kraftliner

After prices for unbleached kraftliner in Germany rose by an average of €80/t in September, stable prices were reported in early October. A flat trend was also seen for white-top kraftliner, but last month's mark-ups here were said to be slightly lower at around €60/t.

Market insiders predict the only segment that might see price movement in October is semi-chemical fluting. Players in the paper and corrugated industry told EUWID in calendar week 40 that the implementation of hikes for fresh-fibre fluting on the German market had not succeeded in September and was slated to take place in the current month. They expected that a large share – but not the full amount – of the targeted hike would be implemented.

Market insiders once again described the market as still tight. Players in the paper and corrugated industry say there is limited availability, especially of brown kraftliner, so additional demand can only be met with significantly longer lead times. Paper mills are even slightly pushing back deliveries of already budgeted volumes, according to sources in the corrugated segment.

The reasons for the tightening, especially for brown paper grades, have not changed substantially. Besides downtime at kraftliner factories, reduced US capacities continue to have an impact. Insiders are therefore not expecting the supply situation to ease anytime soon.

Following the latest price hikes, a few corrugated board producers said they were exploring further substitution potential with their customers. Market experts say this is a response to the ever-widening price gap between kraftliner and recycled corrugated case material.

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Printing industry sentiment in Germany worsens again

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Business sentiment in Germany's printing and media industry deteriorated again in September after a brief improvement in the previous month, according to industry association Bvdm.

The seasonally and calendar-adjusted business situation index fell by 2.0 per cent month-on-month to 88.2 points, although it remained 3.2 per cent above the level recorded a year earlier. Only 3 per cent of surveyed companies rated their current business situation as good, while 22 per cent described it as poor. 75 per cent said business was satisfactory. The balance of positive and negative assessments fell to -18 points.

Order books were also assessed more negatively, with 37 per cent of respondents describing them as poor. Only 4 per cent of business assess their order books to be good and 59 per cent to be satisfactory.

Earnings remained under pressure, although the assessment was somewhat better than a year earlier. 3 per cent of businesses said their earnings situation was good, 57 per cent consider it to be satisfactory and 40 per cent assess their earnings situation to be bad.

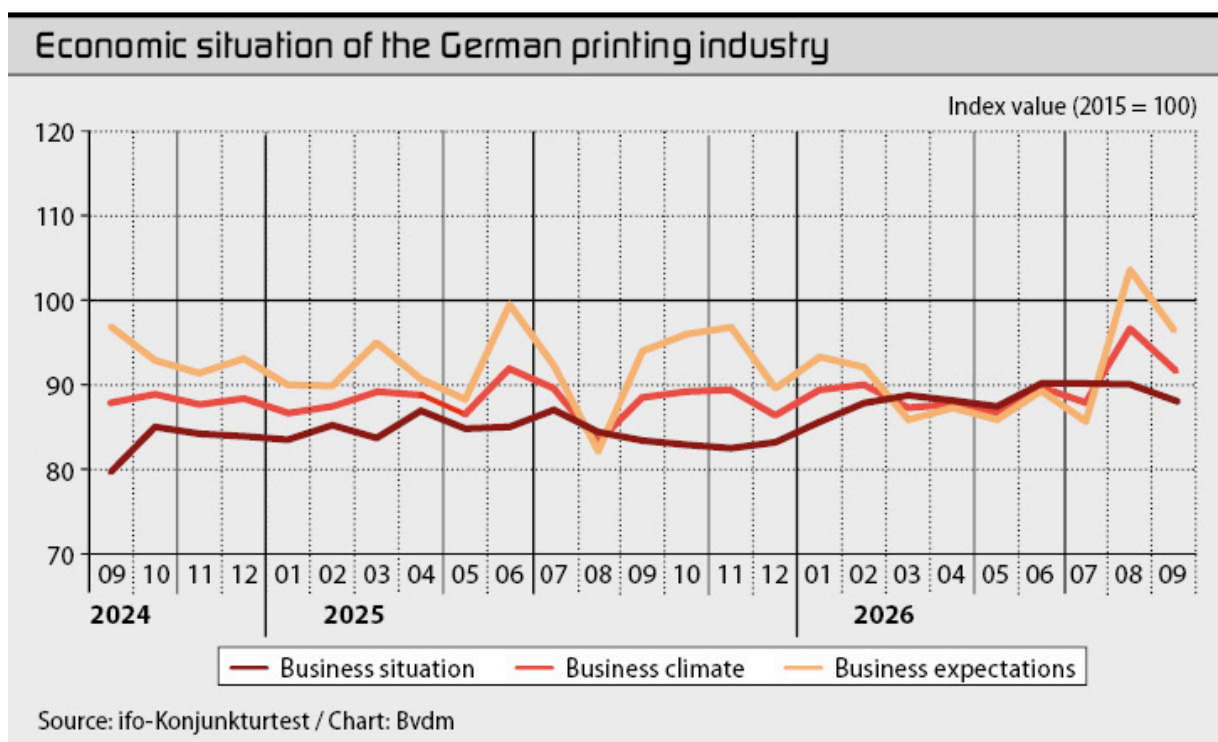
The resulting balance remained clearly negative at -37 points, although this was an improvement on the -51 points recorded in September 2025. Overall, business conditions, order books and earnings therefore remain under pressure.

Companies also became markedly more pessimistic about the next six months. The seasonally adjusted expectations index dropped by 9.2 per cent from August to 95.7 points. However, this is still 3.5 per cent above September 2026.

While 8 per cent of companies expect business to improve, 22 per cent anticipate a deterioration and 70 per cent expect conditions to remain unchanged. The resulting seasonally adjusted balance deteriorated to -15 per cent as a result.

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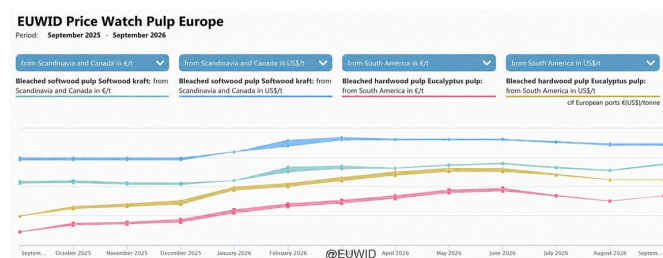
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September proved to be a month of stability for European pulp prices

NBSK and BHK manufacturers seeking to raise prices in Q4

EUWID+ 14 October 2026 Karolina Utracki | Published in issue 42/2026

September is widely seen as a transitional month on the pulp market in Europe. Although not all negotiations between suppliers and buyers in Europe had been put to bed by the time that this issue went to press, it currently appears that hardwood and softwood pulp prices will hold steady. Some suppliers' attempts to raise their prices had been unsuccessful to date.



For much of August, it looked as if softwood pulp prices would be left at July's level. However, buyers still secured price cuts of \$15/t in most cases in talks, some of which were only finalised mid-month and during or after the industry event taking place in Barcelona. This meant that August prices were retroactively revised downwards compared with July, bringing northern bleached softwood kraft (NBSK) prices to \$1,610-1,620/t for both August and September. Bleached hardwood kraft (BHK) pulp prices held steady at \$1,310/t in September.

EUWID Price Watch Pulp Western Europe			
September 2026			
CIF European ports	September 2026 ¹⁾	August 2026	September 2025
Bleached softwood pulp			
Softwood kraft			
from Scandinavia and Canada in €/t	1,438 - 1,447	1,386 - 1,395	1,279 - 1,296
from Scandinavia and Canada in US\$/t	1,610 - 1,620	1,610 - 1,620 ²⁾	1,480 - 1,500
Southern softwood from the US in €/t	1,384 - 1,393	1,335 - 1,343	1,244 - 1,253
Southern softwood from the US in US\$/t	1,550 - 1,560	1,550 - 1,560	1,440 - 1,450
Bleached hardwood pulp²⁾			
Birch pulp from Scandinavia in €/t	1,170	1,128	864
Eucalyptus pulp			
from Portugal/Spain in €/t	1,170	1,128	864
from South America in €/t	1,170	1,128	864
from South America in US\$/t	1,310	1,310	1,000
Southern hardwood in €/t	1,125 - 1,134	1,085 - 1,093	821 - 830
Southern hardwood in US\$/t	1,260 - 1,270	1,260 - 1,270	950 - 960
Hardwood BCTMP			
from Scandinavia and Canada in €/t	527 - 563	517 - 551	458 - 493
from Scandinavia and Canada in US\$/t	590 - 630	600 - 640	530 - 570

¹⁾ Exchange rate as of 9 October 2026: US\$1 = €0.893.
²⁾ Price negotiations were still ongoing at the end of week 41.
²⁾ Softwood pulp prices for August revised downwards following the late conclusion of negotiations.

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Meanwhile, pulp manufacturers are trying to secure higher gross prices for the fourth quarter. Ahead of the industry event in Barcelona, one NBSK producer had announced plans to charge \$60/t more. At least one other pulp producer has since also announced a price increase for Europe. Other producers are taking a wait-and-see approach to developments, telling EUWID that they might seek similar price increases for November.

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In the hardwood pulp segment, the market leader announced plans in late September to raise October prices by \$50/t in Europe. According to market sources, at least one other supplier has since also announced a price increase.

Buyers and sellers disagree on whether the proposed hikes can be implemented. Manufacturers point to production cutbacks and to an increase in buying activity in China. For their part, buyers still see little support from the European paper market and doubt that there is justification for a sustained upward trend in prices.

No additional price cuts for hardwood pulp in September

A few European paper manufacturers had hoped to secure another reduction in hardwood pulp prices in September, but this failed to materialise. Following cuts of \$50/t in both July and August, list prices held steady, according to EUWID contacts on both sides of the market. Monthly negotiations in this segment appear to be mostly complete.

It is still unclear whether the announced hikes might take hold as soon as October or not until November. It will likely take until talks at the end of the month for this to become clear. For now, buyers largely view the price increase announcements as an attempt to change expectations for the months ahead.

Sellers said that developments in China were one reason why they were seeking to charge more in Europe. Integrated paper and board manufacturers in the People's Republic had reportedly cut their own pulp production again because of problems sourcing wood chips and instead purchased additional market pulp. Stronger purchasing activity and rising prices in China prompted suppliers to divert more pulp to Asia.

Bleached eucalyptus kraft (BEK) pulp is reportedly trading at around \$600/t on the European spot market, with only limited additional volumes available. Merchants contacted by EUWID also reported unexpectedly tight spot availability and delayed deliveries. Nevertheless, overall supply is described as unproblematic.

One buyer pointed out that hardwood pulp manufacturers had managed to prevent substantial surpluses from building up despite weak demand for much of the year. Low stocks at paper mills had reportedly also limited buyers' ability to defer purchases for long. Opinions differ on whether the recent sharp increase in European port inventories changes the picture. Producers expect stocks to fall again in the fourth quarter.

EUWID Price Review Pulp Western Europe			
Third quarter 2026			
per tonne CIF European ports	Third quarter 2026	Second quarter 2026	Third quarter 2025
Bleached softwood pulp			
Softwood kraft			
from Scandinavia and Canada in €/t	1,386 - 1,447	1,405 - 1,454	1,271 - 1,297
from Scandinavia and Canada in US\$/t	1,610 - 1,640	1,650 - 1,660	1,480 - 1,510
Southern softwood from the US in €/t	1,335 - 1,393	1,354 - 1,402	1,228 - 1,254
Southern softwood from the US in US\$/t	1,550 - 1,580	1,590 - 1,600	1,440 - 1,460
Bleached hardwood pulp			
Birch pulp from Scandinavia in €/t			
	1,128 - 1,176	1,149 - 1,235	853 - 910
Eucalyptus pulp			
from Portugal/Spain in €/t	1,128 - 1,176	1,149 - 1,235	853 - 910
from South America in €/t	1,128 - 1,176	1,149 - 1,235	853 - 910
from South America in US\$/t	1,310 - 1,360	1,350 - 1,410	1,000 - 1,060
Southern hardwood in €/t	1,085 - 1,150	1,107 - 1,200	810 - 867
Southern hardwood in US\$/t	1,260 - 1,320	1,300 - 1,370	950 - 1,010
Hardwood BCTMP			
from Scandinavia and Canada in €/t	517 - 563	519 - 578	458 - 515
from Scandinavia and Canada in US\$/t	590 - 650	610 - 660	530 - 600
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Production cutbacks intended to support NBSK pulp prices

NBSK negotiations continued beyond the first full week of October. "If we were prepared to settle at unchanged prices, the negotiations would be over by now. We want more," one supplier remarked.

Manufacturers are chiefly basing their calls for higher prices on costs and tighter supply, but there has been no corresponding uptick in demand. Producers themselves acknowledge that this makes for protracted and difficult negotiations.

Views differ on how much impact the production curtailments are having. One supplier reported that producers were still actively offering spot tonnage in July and August, but customers were now increasingly asking about additional deliveries. Another seller confirmed that call-offs improved in September, but viewed this primarily as a recovery from the summer lull. Orders for September and October were in line with expectations, rather than exceeding them.

Sellers reported that the spot market has recently shown signs of both prices and sales volumes firming. A variety of market players still believe that the modest tightening of supply does not yet warrant higher contract prices. However, mill shutdowns are gradually starting to have an impact. Further downtime at a variety of NBSK mills through the fourth quarter and over the winter could help bring supply and demand more closely into balance.

Softwood pulp manufacturers also point to rising prices and stockbuilding purchases in China. That being said, EUWID sources had mixed views on whether the production cutbacks will be enough to secure price increases in Europe as soon as October.

Paper industry sees hardly any room for higher pulp costs

The mood in Europe's paper industry remains subdued. Buyers view the seasonal uptick in call-offs after the summer as no proof of an underlying recovery. The more optimistic outlook reported in some segments is not universally shared, either. "I'm not seeing signs of a lasting improvement anywhere," one pulp buyer commented.

Graphic paper manufacturers are reportedly still having a hard time passing higher costs on to customers. Weak purchasing power and competition from Asian imports are constraining sales of many products. This meant that additional hikes in paper prices might erode demand even more. Therefore, there was little room for paper manufacturers to absorb higher pulp costs. With demand remaining weak within Europe, paper producers see little justification for a sustained upward trend in pulp prices.

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Pulp inventories at European ports surge in August

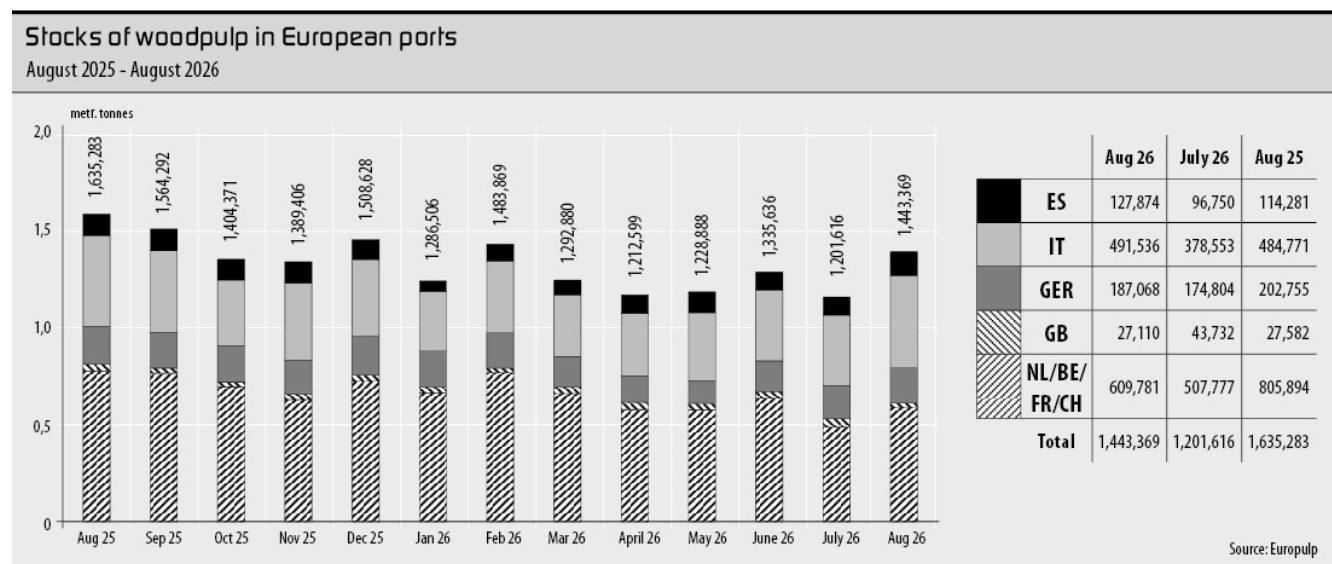
EUWID+ 14 October 2026 | Published in issue 42/2026

Pulp inventories at European ports rose sharply in August. Following the low reached in July, stocks increased markedly by around 242,000 t, or 20 per cent, to roughly 1.44 million t, according to Europulp. Compared with August 2025, however, inventories were still almost 12 per cent lower.

The increase in port stocks was driven primarily by developments in Italy and in the Netherlands/Belgium/France/Switzerland region. In Italy, port inventories swelled by around 113,000 t, or 30 per cent, from July to just under 492,000 t. This also put them slightly above the year-earlier level.

At ports in the Netherlands, Belgium, France and Switzerland, inventories rose by a combined 102,000 t, or 20 per cent, to just under 610,000 t. Compared with August 2025, however, this still represented a decline of just over 24 per cent. Port stocks also increased in Spain and Germany. In Spain, inventories rose by just over 32 per cent month-on-month to just under 128,000 t. In Germany, stocks increased by 7 per cent from July to around 187,000 t.

By contrast, inventories in the UK fell sharply. At around 27,000 t, they were 38 per cent lower in August than in July.



Pulp consumption at European mills falls sharply in August

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European paper mills used significantly less market pulp in August than in the previous month. Utipulp reports that consumption in its member countries amounted to around 661,000 t. This was just over 17 per cent lower than in July and almost 6 per cent below the level recorded in August 2025.

Consumption of bleached hardwood kraft pulp fell by just over 19 per cent from July to just under 433,000 t. Use of bleached softwood kraft pulp declined by around 14 per cent to just under 180,000 t.

Inventories at paper mills increased slightly in the same month. In August, companies covered by Utipulp held around 639,000 t of market pulp in stock, compared with around 633,000 t in July. Compared with August 2025, inventories were just over 7 per cent lower.

In terms of production days, total inventories were unchanged at 24 days. Stocks of bleached hardwood kraft pulp corresponded to 24 production days, up from 23 days in July. For bleached softwood kraft pulp, inventories fell from 24 to 22 production days.

Inventories and consumption of pulp consumers in Europe								
August 2026								
tonnes		UNBLEACHED		BLEACHED / SEMI-BLEACHED			Total	Previous year
		Sulphite & Kraft	Softwood sulphite	Hardwood sulphite	Softwood kraft	Hardwood kraft		
Inventories								
July	2026	11,634	32,079	10,432	171,715	407,168	633,028	686,069
August	2026	11,142	33,117	14,980	155,614	424,324	639,177	688,538
Consumption								
July	2026	8,020	31,555	13,930	209,870	536,781	800,156	813,938
August	2026	6,976	29,114	12,792	179,758	432,759	661,399	702,956
NB: Total and previous year total do not include DIP and CTMP, figures are constantly revised.								
Each national Association has to provide an estimation for 100% of the national volumes out of their samples (from 80% to 100% depending on the countries).								
Source: UTIPULP								

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Gesparec conference: Germany to remain net importer of recovered paper

Structural transformation leading to shifts in RCP flows and grade mix

 **EUWID +** 14 October 2026 | Published in issue 42/2026

The German paper industry will remain considerably dependent on recovered paper imports in future. At the same time, the composition of available recovered paper will likely continue to change as a result of the structural transformation in the paper industry, said Martin Drews of German paper industry association Die Papierindustrie, speaking at the recovered paper conference organised by German paper recycling organisation Gesparec (Gesellschaft für Papier-Recycling) in Rüsselsheim on 29 September.

Germany has been a net importer of recovered paper since 2010. German exports of recovered paper had previously peaked at around 4 million t and started declining considerably from 2009 onwards. Most recently, they amounted to only approximately 1.5 million t.

In 2025, domestic collections were not sufficient to meet demand for any of the main grades of recovered paper that the association monitors. The share of imports was especially high for mixed grades (62 per cent) as well as newspapers and magazines (41 per cent). Corrugated board and kraft grades continue to account for the largest share of recovered paper consumption in Germany.

Share of imports rises to 31 per cent

The ratio of imports compared to recovered paper consumption in Germany increased in 2025 to 31 per cent, up from 25 per cent in 2012. The main suppliers to Germany are Poland and the Netherlands. Imports from Poland in 2025 were up by 73 per cent compared with the 2020 level. After dropping off in 2023, imports from the Netherlands nearly reached the 2020 level again. However, it should be noted that the Netherlands serves as a European trading hub with high import and export volumes, so the volumes it supplies to Germany were not necessarily collected in the country.

At the same time, recovered paper procurement is increasingly focused on a few neighbouring countries. In 2025, the ten largest supplying countries accounted for 92 per cent of Germany's recovered paper imports. Nearly all imports come from Europe, with sources outside of Europe playing only a minor role.

Gains for supermarket paper and board grades, losses for deinking grades

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In addition to shifting trade flows, there are also significant changes in grade structures. In 2025, ordinary grades accounted for around 79 per cent of total recovered paper consumption in Germany. Consumption of kraft grades reached a new record high and are seeing a long-term upward trend, according to the association. Consumption of medium and higher grades, by contrast, was around one-third below the level recorded in 2010.

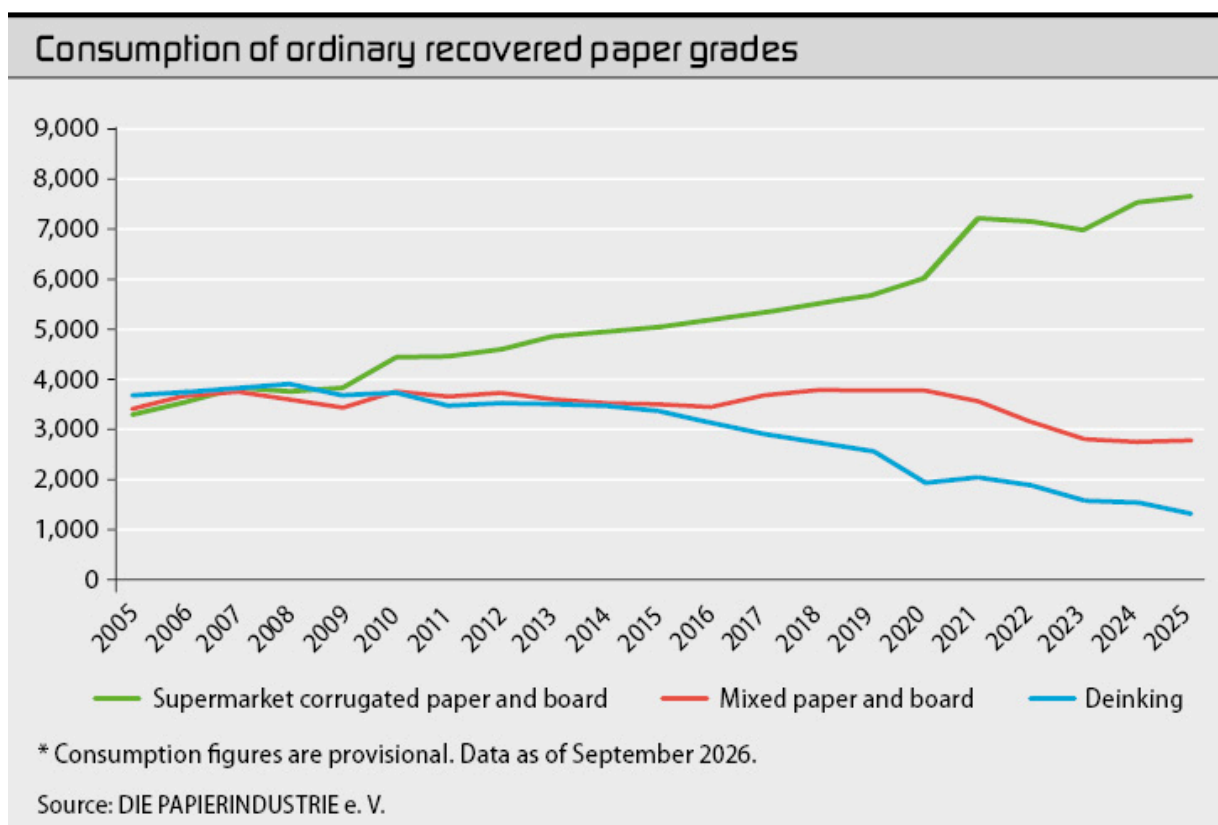
The shift was particularly evident within the ordinary grades: 2025 saw the highest consumption of supermarket paper and board grades over the entire period under observation since 2010. Deinking grades, on the other hand, have become less and less important since the middle of the last decade, reflecting the structural transformation in the market for printing and writing paper.

This was also reflected in the 2025 statistics for German paper production: Overall paper output fell by 2.5 per cent last year, but the manufacturing of graphic paper decreased by nearly 17 per cent. The share of graphic paper – which in 2007 still represented the largest group of grades within the German paper industry – declined to 18 per cent by 2025. Meanwhile, the share of paper and board for packaging applications increased to 67 per cent of total German production.

Mr Drews expects that the quality of recovered paper arisings will continue to change amid the ongoing contraction in the graphic paper segment and the development of new paper products. Once the structural transformation in the graphic paper segment is concluded, there will be renewed growth potential for paper production in Germany, he believes. This could happen in the near future, Mr Drews added.

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Industry coalition opposes linking free allocation of ETS allowances to investment requirements

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A joint initiative of German industrial and business associations – including the Die Papierindustrie association – has turned to Germany's Federal Environment Minister Carsten Schneider, Federal Minister for Economic Affairs Katherina Reiche as well as further representatives of the federal government and the EU Commission. The initiative unanimously expressed its opposition to linking the free allocation of emission allowances under the EU Emissions Trading System (EU ETS) to additional investment requirements, a proposal brought forward by the European Commission.

Reports indicate that the associations support the objective of low-carbon industrial production. Simultaneously, however, they warn against weakening carbon leakage protection by introducing additional conditions. In their opinion, the free allocation serves to compensate for competitive disadvantages compared to plants outside of Europe and does not constitute an instrument for funding transformation-related investments. The coalition of associations underlines that many preconditions required to be fulfilled for the transformation of industry have not yet been met.

In line with the above view, these preconditions particularly include competitive energy prices, the expansion of the required infrastructure as well as viable business models for climate-friendly technologies. Additional investment requirements would therefore not result in higher investments – rather, they would further aggravate the burden imposed on energy-intensive companies. Consequently, the coalition of associations demands that the federal government comes out against linking the free allocation of emission allowances under the EU ETS to the fulfilment of certain conditions.

In their statement the associations explain that the risk of continued deindustrialisation and associated job losses does are not sufficiently taken into account in the European Commission's proposal. Rising CO₂ costs are placing a burden on the sectors concerned at a time when they are confronted with their own weak competitiveness, high energy prices and considerable geopolitical uncertainty. Industrial value creation, investment activity and Europe's capacity for innovation are under increasing pressure in the long term. Against this backdrop, the proposed compensatory measures and investment requirements are regarded as counterproductive.

The coalition of associations says the assumption that the monetary value of freely allocated emission allowances can serve as a source of funding transformation-related investments is incorrect. From the point of view of the associations, free allocation does not constitute freely available capital but rather serves as an instrument to protect against carbon leakage. It does not provide companies with additional financial resources but merely offers partial

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relief from the costs arising under the EU ETS, which competitors outside the EU do not have to bear. In view of the associations, the introduction of additional investment requirements misjudges the fundamental purpose of free allocation and significantly undermines its effectiveness.

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Prices for sawdust in Germany rising markedly again at beginning of fourth quarter

More pronounced regional differences / Supply remains lower than average

 **EUWID +** 14 October 2026 | Published in issue 42/2026

In Germany, not all of the negotiations on follow-on contracts for deliveries of sawmill residues in October or in the fourth quarter had been brought to a conclusion by the beginning of October. Owing to suppliers' and buyers' sometimes widely diverging notions, negotiations have been deferred to a later date or the contract parties dispensed with a continuation of the deliveries for the time being. Where new contracts were concluded, substantial price increases for sawdust were generally accompanied by rollovers and, in some cases, slight price reductions for MDF/pulp woodchips.

EUWID Price Watch Sawmill Residues Germany October 2026					
€/loose m ³	8 Oct 2026	27 Aug 2026	16 July 2026	16 Oct 2025	% change 2026/2025
Southern Germany					
Woodchips*	23.50 - 26.00	23.50 - 26.70	23.50 - 26.00	19.50 - 21.00	+ 22.2
Sawdust*	28.00 - 30.50	25.00 - 27.50	24.00 - 26.00	20.00 - 22.00	+ 39.3
Northern/Western Germany					
Woodchips*	25.00 - 30.00	25.00 - 27.00	25.00 - 27.00	20.00 - 22.00	+ 31.0
Sawdust*	25.50 - 33.80	25.50 - 27.50	25.00 - 27.00	21.00 - 22.50	+ 36.3
Eastern Germany					
Woodchips*	24.00 - 26.50	23.50 - 26.50	23.50 - 26.00	19.50 - 21.00	+ 24.7
Sawdust*	28.50 - 31.00	24.50 - 27.00	23.00 - 25.50	20.00 - 21.00	+ 45.9
* without bark					
Average prices for sawmill residues sold to industrial clients, ex mill					
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Correspondingly, the difference in price between the two assortments has also risen again to €4-5/m³ or €30-35/t at the start of the fourth quarter. Another notable feature was the renewed predominance of quarterly contracts, with monthly agreements accounting for only a small share. Contracting parties broadly agreed that the underlying conditions on the sawmill residues market in Germany were unlikely to change fundamentally over the coming twelve weeks. Owing to a lack of any improvement in sales opportunities, the German sawmilling industry is sticking to its reduced level of cutting activity. Problems with the volume of sales of particleboard and MDF, on the other hand, are inducing wood-based panel manufacturers to adjust their capacity accordingly.

The driving force behind the latest development is a marked reduction in cutting activity by the Germany sawmilling industry, a recently high level of business activity and sharply higher prices on the German pellet markets. In addition, there is a reduced supply of industrial softwood due to a further sharp decline in the supply of damaged softwood this year. Added to this is the fact that, in a number of instances, residual-wood processors' creation of winter stocks has so far fallen short of their original plans.

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For sawdust in particular, a large proportion of sawmills' demands for further price increases in the region of €2-3/m³ or €15-20/t have only been accepted by buyers in the pellet industry whereas most buyers in the wood-based panel industry were not willing to pay these prices. After the increases already realised in one-month contracts for September, the agreed new prices in sales to the pellet industry currently span a range of around €29.50-33.80/m³ ex sawmill, which equates to around €220-240/t. The highest prices are currently being quoted from western Germany again, while the lowest are to be found in the northeast. Here, however, German sawmills must also compete with goods imported from Scandinavia at prices of €160-170/t free at port.

While sawdust prices have increased as described, prices for MDF/pulp chips have mostly been rolled over, although regional differences have again been evident. In the south and far north, price peaks from the previous quarter were reduced slightly by €4-5/t, while in the high-price regions of western Germany for sawdust, chip prices were in isolated cases also pushed higher. Nationwide, chip prices are currently in a range of around €24-28/m³ ex works.

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German packaging market shrinks again in 2025

 **EUWID +** 14 October 2026 | [Published in issue 42/2026](#)

The German packaging market contracted once again in 2025, according to GADV, the umbrella organisation of Germany's packaging industry associations. Production volumes reportedly declined by 2.4 per cent year-on-year to 16.7 million t. The value of production decreased by 1.7 per cent to around €36.4bn. In terms of production value, plastic packaging continued to be the largest packaging fraction with a share of 44.9 per cent. When measured by volume, paper and board packaging was dominant with a share of 47.1 per cent.

All packaging fractions, except plastic packaging, recorded declines in 2025, according to GADV. In the paper and board packaging segment, production volume fell by 3.4 per cent year-on-year, while the production value was down by 0.8 per cent.

GADV emphasises that packaging producers continue to face a challenging market environment. At the same time, new regulatory requirements are creating additional need for clarification, according to the industry associations. The German packaging market is especially affected by the application of the EU's Packaging and Packaging Waste Regulation (PPWR) and the entry into force of Germany's Packaging Law Implementation Act (Verpackungsrecht-Durchführungsgesetz, VerpackDG). In the view of the associations that belong to GADV, there is still considerable uncertainty throughout the industry with regard to the interpretation and application of the new rules.

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Niederauer Mühle launches testliner with recycled beverage carton fibres

🔗 **EUWID +** 14 October 2026 | Published in issue 42/2026

German recycled containerboard producer **Papierfabrik Niederauer Mühle** has launched a new white-top testliner under the name of Eifelliner Paperloop, containing a guaranteed minimum of 25 per cent of paper fibres from recycled beverage cartons. According to the company, it is the first and only testliner with a guaranteed content of fibres derived from beverage cartons. Niederauer Mühle is the last paper mill in Germany to process used beverage cartons and recycle their fibres into new paper.

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UPM Nordland Papier expands use of water-saving technology

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UPM's German fine paper mill **UPM Nordland Papier** is expanding the use of fresh water-saving sealing technology in collaboration with John Crane. According to John Crane, the mill's fresh water consumption currently stands at around 4 m³ per tonne of paper. The new technology can reportedly save up to 180 litres of fresh water per hour on each pump. Nordland Papier produces around 840,000 tpy of fine and specialty paper with 1,170 employees.

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China raises domestic fibre use while wood pulp imports grow in 2025

Domestic RCP use reaches 72 million t; recycled pulp imports decline

 **EUWID +** 14 October 2026 | Published in issue 42/2026

China's pulp and paper industry continued to expand domestic pulp production and the use of domestically recovered paper in 2025. At the same time, however, consumption of imported market wood pulp increased considerably, according to the China Paper Association's (CPA) annual report for 2025.

China's total pulp production rose by 4 per cent year on year to 98 million t in 2025, with output of wood pulp growing more strongly than recycled pulp production. Wood pulp output increased by 5 per cent to 28 million t, while recycled pulp production grew by 3 per cent to 65 million t. Production of non-wood pulp edged up by nearly 2 per cent to 5 million t.

The increase in domestic wood pulp output therefore continued, although growth was considerably slower than in 2024, when production had risen by 14 per cent.

Within the non-wood pulp segment, bamboo pulp continued to gain importance. Production increased from 2.6 million t in 2024 to 2.8 million t in 2025. By contrast, production of reed pulp, bagasse pulp and straw pulp declined further.

Wood pulp consumption rises by 6 per cent

Total pulp consumption in China increased by 4 per cent to 129 million t in 2025. Wood pulp consumption grew at an above-average rate of 6 per cent to 54.50 million t and accounted for 42 per cent of total fibre consumption, compared with 41 per cent in 2024.

Both domestic and imported wood pulp contributed to the increase. Consumption of domestically produced wood pulp rose by 4 per cent to just over 27 million t, while consumption of imported wood pulp rose twice as fast, by 8 per cent, to nearly 27.5 million t. Imported and domestic wood pulp thus each accounted for 21 per cent of total pulp consumption in 2025.

Recycled fibre remained the most important raw material for China's paper industry, accounting for 54 per cent of total pulp consumption. Recycled pulp use rose by 2 per cent to 69 million t.

The development differed markedly depending on the source. Consumption of domestically produced recycled pulp increased by 3 per cent to 66 million t, whereas imported recycled pulp fell by just over 10 per cent to nearly 4

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million t.

Domestic recovered paper use reaches new high

The amount of domestically collected recovered paper used by China's paper industry increased by 3 per cent to 72 million t in 2025, reaching another record high. The recovered paper collection rate edged up from 51.1 to 51.8 per cent, while the utilisation rate decreased slightly from 51.6 to 51.3 per cent.

China's use of domestic recovered paper has increased markedly since 2020, when imports of recovered paper were largely eliminated. In 2020, domestic recovered paper use stood at 55 million t; by 2025 it had increased by around 17 million t. Over the 2016-2025 period, the CPA puts the average annual growth rate at 4 per cent.

Imports of recovered paper themselves remained negligible at around 580,000 t in 2025, according to Chinese customs data cited by the CPA. Imports of pulp, by contrast, increased by nearly 6 per cent to 36 million t.

China: Pulp production and consumption by fibre source						
million t	Production			Consumption		
	2025	2024	Change %	2025	2024	Change %
Total	97.94	94.54	+ 4	128.91	124.15	+ 4
Woodpulp	27.49	26.26	+ 5	54.50	51.39	+ 6
Imported woodpulp*				27.48	25.44	+ 8
Domestic woodpulp				27.02	25.95	+ 4
Recycled pulp	65.26	63.18	+ 3	69.48	68.01	+ 2
Imported recycled pulp				3.72	4.14	- 10
Domestic recycled pulp				65.76	63.87	+ 3
Non-wood pulp	5.19	5.10	+ 2	4.93	4.75	+ 4
* Imported woodpulp used in paper and board production						
Source: China Paper Association						

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Eikemeier parts with Wellpappenwerk Gittersee

 **EUWID +** 14 October 2026 | [Published in issue 42/2026](#)

Eikemeier Packaging has divested corrugated packaging producer Wellpappenwerk Gittersee in a management buyout (MBO). Managing director Frank Schleicher has acquired 100 per cent of the shares, making the company fully independent from its former parent group.

The business has been operating as Wellpappenwerk Dresden since 1 September 2026 and continues operations with 16 people and eight packaging production lines at its existing site, Mr Schleicher confirmed to EUWID. Financial details of the transaction were not disclosed.

Mr Schleicher, who has headed the company since 2001, said the new ownership structure would allow the business to further develop its activities in customised packaging and logistics services as an independent company.

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Autajon Simply Carton to move headquarters to new site

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Autajon Simply Cartons is preparing to open a new manufacturing site and headquarters in the Giltbrook area of Nottingham in 2027. The UK folding carton producer said the facility is currently being refurbished and will become the company's new manufacturing site and head office. Further details on the size of the facility, planned production capacity and machinery have not yet been disclosed. It is also not yet clear what will happen to Simply Cartons' existing operations once the new site comes on stream, or whether the project will result in a net increase in production capacity.

Simply Cartons, which is based in Nottingham, produces printed and highly finished folding cartons for markets including luxury goods, health and beauty, food and confectionery, wines and spirits and pharmaceuticals.

The company has been part of French packaging group Autajon since 2023. Autajon acquired Simply Cartons together with Dutch folding carton producer Tendero in September 2023, marking the group's entry into the UK market.

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Walter Verpackungen begins search for investor

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The search for an investor for insolvent German packaging manufacturer Walter Verpackungen has begun. Provisional insolvency administrator Alexander Eggen said he was cautiously optimistic about finding a buyer for the company. The aim was to ensure long-term continuation and commercial stabilisation of the business, law firm Schultze & Braun told EUWID. Business operations are said to continue without restrictions.

Walter Verpackungen filed for provisional insolvency proceedings on 24 August 2026. The company had taken over the business only on 1 July 2025. The buyer at the time was WV Verpackungen, but the company was subsequently renamed Walter Verpackungen. The shareholder of today's Walter Verpackungen is the Foit Holding.

The insolvency administrator cites the loss of some customers arising from the prior insolvency as the cause of the company's renewed financial distress. The resulting decline in sales had created a liquidity shortfall that the company had been unable to cover on its own, despite restructuring measures already implemented, he said. As part of the restructuring initiated before the insolvency filing, the company's second site in Offenbach am Main was closed at the end of August 2026.

Walter Verpackungen produces folding cartons and confectionary packaging for chocolate, pralines and macarons, amongst others.

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Russian strike destroys Snow Panda warehouse

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Ukrainian tissue converter Bloomy LLC, a company behind the Snow Panda brand, says its warehouse complex in the Odesa region has been hit and completely destroyed in another Russian attack. In a short Facebook post on 22 September, the company said the complex had been attacked for the second time. No one was injured, according to the company. The company did not provide any further information on the attack or possible impact on business activities in the post.

The September-attack followed an earlier missile strike at the start July that destroyed part of the company's production and warehouse premises. According to earlier company information, production and storage areas were significantly damaged and several employees suffered minor injuries.

Bloomy LLC is based in Odessa and produces toilet paper, paper towels, paper napkins and wet wipes under the Snow Panda brand.

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Kama files for bankruptcy, production continues

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German manufacturer of finishing, punching and gluing machines for the packaging and job-order industries Kama has filed for insolvency proceedings. On 25 September, the Dresden District Court ordered start of preliminary proceedings and appointed Reinhard Klose of Flöther & Wissing as provisional insolvency administrator.

Kama is continuing operations under existing conditions for the time being, said a spokesperson for the insolvency administrator. However, the company's order backlog is currently insufficient to fully utilise production capacity. The insolvency filing has for far had no adverse impact on operations. The company hopes that the insolvency process will allow it to continue the investor search already underway under simplified conditions, the spokesperson added.

Almost 90 employees are affected by the company's financial difficulties. Efforts are underway to secure continued production.

Kama GmbH manufactures die-cutting and embossing machines as well as systems for hot-foil stamping. Its portfolio also includes folding and gluing machines used, among other applications, in folding carton production.

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K-C developing alternative natural fibre for hygiene products

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Kimberly-Clark (K-C) is developing a new natural fibre that could serve as an alternative to wood-based fibres in tissue paper and hygiene products. The US company has created a patented technology platform that converts fibres from the hesperaloe plant into a material suitable for use in hygiene applications. To further develop the technology, K-C is currently building a pilot plant in Yuma, Arizona. The company is reportedly also working with farmers and technical experts in Arizona, California and other parts of the southwestern US to assess the potential of hesperaloe as a year-round agricultural fibre source.

Hesperaloe is a drought-tolerant succulent plant native to the southwestern United States, with long, fibre-rich leaves. According to K-C, hesperaloe requires less water than several crops currently grown in the region. The alternative fibre could broaden the raw material base for hygiene products as well as reduce dependence on traditional fibre sources. The company did not respond to a query from EUWID on which fibre sources are to be substituted.

K-C employs around 38,000 people worldwide and generated sales of around \$16.4bn in 2025. The company is producing tissue and hygiene products with popular brands such as Huggies, Kleenex and Kotex.

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Mercer defers interest payment, Rosenthal pulp mill still idle

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Forest products group Mercer International is negotiating with a group of noteholders on a comprehensive recapitalisation and a significant injection of new capital. The group aims to address its upcoming debt maturities, enhance liquidity and substantially reduce both its funded debt and the associated interest expense. In light of the ongoing negotiations, Mercer International elected not to make the \$25.8m interest payment due on 1 October on its senior notes due 2028, instead opting to use the 30-day grace period provided under the indenture governing the notes. According to the group, this does not constitute an “event of default” that would allow the notes to be declared immediately due and payable.

In its 2 October filing with the US Securities and Exchange Commission (SEC), Mercer said the participating noteholders collectively held more than 75 per cent of the aggregate outstanding principal amount of its notes due 2028 and 2029. The two issues have a combined principal amount of more than \$1.27bn. Of this, \$400m comprises the 12.875 per cent senior notes maturing in October 2028. The remaining \$875m comprises the 5.125 per cent senior notes maturing in February 2029.

Mercer described the negotiations as advanced and expressed optimism that it would be able to announce a transaction in the near term. However, the group said there was no assurance that a definitive agreement would be reached with the participating noteholders, or as to its timing or terms.

According to Mercer, business continues in the ordinary course. Customers continue to be served and suppliers, contractors and employees paid as usual. The group does not expect the proposed recapitalisation to affect its relationships with, or obligations to, these stakeholders.

The negotiations follow a loss-making first half. In August, the group said it was working with advisers and key stakeholders to explore financing options to strengthen its capital structure.

Mercer has an annual production capacity of 2.1 million t of bleached softwood and hardwood kraft pulp, spread across the Rosenthal and Stendal mills in Germany and the Celgar and Peace River mills in Canada. The group also has annual capacity to produce 2.4 million m³ of lumber, 210,000 m³ of cross-laminated timber, 45,000 m³ of glulam, 17 million pallets and 230,000 t of biofuels.

Restart of Rosenthal pulp mill delayed

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Production at Mercer's Rosenthal 360,000 tpy NBSK pulp mill in Germany remains meanwhile suspended. The company shut down production in early September for what was originally scheduled to be an extended, four-week maintenance stoppage. During the restart on 1 October, however, discolouration was reported near the wastewater discharge point into the river Saale. Mercer subsequently suspended wastewater discharge into the river and halted the restart process.

In coordination with the relevant authorities, Mercer gradually resumed wastewater discharge from its on-site treatment plant from 3 October and continued preparations to restart the pulp production line. As of the editorial deadline on 13 October, Mercer had not provided a specific date for the resumption of pulp production at Rosenthal mill.

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SCA upgrades cooking plant at Östrand pulp mill

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SCA has upgraded the cooking plant at its Östrand NBSK pulp mill in Timrå, Sweden. The work was carried out during the mill's annual maintenance shutdown, which began in late September, and the plant resumed operations in calendar week 41.

According to the company, the upgrade is intended to increase production output, improve pulp quality and make operations more efficient and reliable. The measures are designed to reduce chemical consumption and the carbon footprint, better preserve the fibres' natural strength and improve wood yield. SCA also expects fewer unplanned shutdowns and faster restarts following production interruptions, improving delivery reliability.

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Pulpex opens fibre bottle production site in Glasgow

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British packaging technology developer Pulpex officially opened its first commercial fibre bottle manufacturing facility near Glasgow on 8 October. The plant initially has a production capacity of up to 40 million bottles per year. According to Pulpex, more than 90 per cent of the initially available production capacity for the current financial year has already been sold. With the opening of the plant, Pulpex says it has moved from the development and pilot phase to industrial-scale production. Around 39 jobs have been created at the Glasgow site.

The patented fibre bottle is made from sustainably sourced wood pulp and contains no hidden plastic components, according to the company. A thin internal barrier coating is designed to provide the necessary protective properties without compromising recyclability in the recovered paper stream. The bottles are also said to be compatible with existing filling equipment.

Partnership with Alternicq to develop Indian market

Alongside the start-up of production in Scotland, Pulpex is expanding its international partner network. On 6 October, the company announced an exclusive agreement with Alternicq, one of India's largest manufacturers of rigid plastic packaging.

The two companies initially intend to explore market opportunities for fibre bottles in India and lay the groundwork for local production. In addition to India, the exclusive agreement covers the Gulf Cooperation Council (GCC) countries, with a possible extension to Australia.

The agreement is intended as a precursor to a comprehensive manufacturing licence. No concrete investment decision on a production facility has yet been announced.

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