

DS Smith orders ABB solution for PM 3 at Kemsley mill

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UK paper and packaging company DS Smith, now part of International Paper, has selected ABB to supply electrification, automation and digital solutions for a new stock preparation line at its Kemsley paper mill in Kent, UK. The project forms part of the papermaker's £50m investment in a new fibre line for the PM 3 at Britain's largest recycled paper mill. Under the contract, ABB will supply a distributed control system (DCS), along with low-voltage motor control centres, motors, drives, safety systems and the digital Asset Performance Management platform. The new systems will be connected with Kemsley's existing ABB-based control infrastructure to enable end-to-end process visibility and control.

The new F-Line, set for commissioning in 2026, will supply high-quality recycled fibre to the mill's paper machine PM 3, which has a capacity of 290,000 tpy of white-top testliner, plasterboard liner and other corrugated case material (CCM) grades, according to information given earlier.

Proampac buys bag converting business from International Paper

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Global flexible packaging producer Proampac, based in Cincinnati, USA, is acquiring International Paper's bag converting business. The acquisition will significantly expand Proampac's converting capacity. It also supports the company's strategy to shift towards paper- and board-based packaging solutions, a company press release says.

The business acquired from International Paper includes manufacturing sites on the US West Coast (California and Oregon), and in Texas. These facilities specialise in kraft paper bags for grocery stores, convenience retailers and quick-service restaurants, including handled shopping bags, self-opening sacks and small packaging formats. The financial terms of the transaction were not disclosed.

Saica breaks ground on US packaging plant in Indiana

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Spanish packaging producer Saica Group has begun construction of its second corrugated packaging plant in the United States. The new Saica Pack facility in Anderson, Indiana, represents an investment of more than \$110m.

Factory operations are scheduled to begin in the fourth quarter of 2026. Within the first two years of operation, Saica expects to create more than 50 full-time jobs, with total employment projected to exceed 100 positions once the plant reaches full capacity. The almost 32,500 m² site will include manufacturing, converting, and ware-housing operations, and will be equipped with a rail connection for paper roll shipments. It will also serve as a backup facility for Saica Pack Hamilton (Ohio) to strengthen supply chain security.

According to the Indiana Economic Development Corporation (IEDC), Saica's plans to create more than 100 new jobs by 2030 have qualified the company for up to \$2m in incentive-based tax credits, \$150,000 in training grants, and \$300,000 from the Industrial Development Grant Fund to support local infrastructure improvements.

The investment forms part of Saica's broader strategy to expand in the US market, where the company plans to invest around \$800m over the coming years.

"This investment is proof that we are moving forward with our plans in the US," said Susana Alejandro, President and CEO of Saica Group. "We are confident that our experience in lightweight containerboard and corrugated packaging will enable us to deliver high-performance, resource-efficient solutions that stand out in a competitive market."

Weak European business weighs on Billerud's Q3 results

Company faces challenges from overcapacities in cartonboard market

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Swedish company Billerud posted weak results for the third quarter and described market conditions in Europe as particularly challenging. "We continue to meet completely different market realities in our two regions," said CEO Ivar Vatne. According to him, market conditions in Europe remained difficult, whereas business in North America performed well.

Overall, Billerud posted a net loss of SEK63m for the third quarter of 2025, compared with a profit of SEK565m the same quarter of 2024. The loss also burdened the net result for the first nine months of the year, which fell by more than half year-on-year to SEK407m. Operating profit and Ebitda for the first three quarters decreased by 43 and 17 per cent to SEK1.47bn and SEK3.61bn respectively. Sales, by contrast, eased only slightly by 2 per cent to SEK31.99bn.

Billerud continues to face difficult market conditions in Europe and points to muted packaging consumption, cost inflation and currency headwinds. The company also complains about structural overcapacities in the cartonboard sector, which it attributes to recent capacity expansions, and the shifting of trade flows following the introduction of US import tariffs. Billerud says it had cut production in various segments. As a result, deliveries declined, compounded by lower sales prices. The majority of the production curtailments are said to have taken place in the cartonboard mills. Maintenance stops at the Gävle and Karlsborg plants in the third quarter had a negative impact on costs, the company said.

Within the European businesses, all of Billerud's product categories except market pulp booked lower sales in Q3 than in the previous year. The decline in the cartonboard segment was the largest at 22 per cent, whereas revenue from market pulp sales increased by 20 per cent. Operating profit in the Europe region fell by a full 75 per cent to SEK153m compared to Q3 of 2024. At SEK552m, the nine-month result dropped by 50 per cent from the same period last year.

According to Billerud, business in North America was stronger. Market conditions had improved in the region, the company said. Since the US import tariffs came into force in August, customer interest had continued to increase, it added. Billerud said its strategic decision to refocus its portfolio in North America towards packaging materials has been validated and added that the realignment was progressing well.

With sales of around SEK9bn, Billerud generated an operating profit of SEK1.23bn from its North American business in the first nine months, an increase of 19 per cent year-on-year. However, operating profit in the third quarter fell by 19 per cent compared with Q3 of 2024 to SEK314m.

Billerud aims to address the challenges in various markets through a recently announced cost- saving programme, among other measures. The programme aims to generate annual savings of SEK800m and is expected to have a noticeable positive contribution from the first quarter of 2026. The company also continues to focus on new products and innovations.

For the coming quarter, Billerud retains expectations of solid market conditions for its North American operations, but also continued headwinds in Europe. The company also expects the cost of pulpwood to fall further, which would relieve the burden on business in Europe.

Billerud results

million SEK	July - Sept		January - Sept	
	2025	2024	2025	2024
Key figures				
Sales	9,905	10,798	31,250	31,985
EBITDA	708	1,555	3,008	3,605
Operating result	9	851	835	1,470
Net result	-63	565	407	941
Business area review				
Region Europe				
Sales	6,231	6,980	19,842	20,911
liquid packaging board	2,097	2,369	6,734	7,544
containerboard	1,251	1,490	3,823	4,069
kraft and specialty paper	882	999	2,797	2,981
sack paper	775	841	2,553	2,387
cartonboard	563	725	1,968	2,092
market pulp	615	512	1,767	1,648
EBITDA	652	1,106	2,039	2,520
Operating result	153	629	552	1,103
Deliveries, 1,000 t	624	662	1,920	2,046
Region North America				
Sales	2,960	3,138	9,041	8,947
graphic paper	2,136	2,140	6,318	6,232
label paper	507	547	1,634	1,563
market pulp	286	452	1,045	1,153
EBITDA	467	575	1,769	1,585
Operating result	314	387	1,232	1,036
Deliveries, 1,000 t	246	236	725	668
Other				
Sales	714	680	2,367	2,127
EBITDA	-411	-126	-800	-500
Operating result	-458	-165	-949	-669

Source: Billerud

Weak demand pushes Metsä Board further into the red in the third quarter of 2025

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Against the backdrop of persistently challenging conditions in the packaging board market, Finnish company Metsä Board slipped deeper into the red in the third quarter of the current fiscal year. According to the financial report published in late October, weak customer demand, the US government's tariff policy, and ongoing overcapacity in the markets for primary fibre cartonboard and white kraftliner all weighed on the company's results.

For January-September 2025, Metsä Board reported sales revenues of €1.38bn, down from €1.49bn in the same period of 2024. Ebitda for the period declined to €33.4m (€149.4m). Overall, Metsä Board posted a net loss of €69.8m for the first nine months of 2025, compared with a profit of €41.9m one year earlier.

Earnings were affected by various factors, among them the closure of the Tako board mill in June, the temporary idling of the Simpele board mill for conversion and investment projects, as well as the downtime at the Husum mill. Comparable operating profit was additionally impacted by lower average prices for market pulp, reduced deliveries of board and market pulp as well as market-related production cuts. Maintenance costs were also higher than in the previous year.

Year-to-date deliveries of folding boxboard totalled 704,000 t (770,000 t) by the end of September. The drop in production volume was more pronounced at 684,000 t (811,000 t). In comparison, the situation for white-top kraftliner was more stable, with deliveries easing only slightly to 356,000 t from 360,000 t in the same period of 2024.

Metsä Fibre posts higher sales, but negative operating profit

In the pulp segment, Metsä Fibre reports higher sales revenue, partly reflecting increased pulp deliveries, but operating profit turned negative due to weaker pulp prices and higher wood costs. Sales totalled €2.01bn, up from €1.69bn in the same period of 2024, while Ebitda fell to €143m (€187.6m). The division posted an operating loss of €61.1m, compared with a profit of €7.8m a year earlier. Pulp deliveries rose to 2.22 million t (2024: 1.76 million t).

Overall demand for pulp declined significantly in April following the announcement of US import tariffs, but has gradually recovered since June, supported by stronger intake from China. In Europe, recovery in demand was delayed especially by weak demand for paper and paperboard, Metsä writes. In China, demand picked up in the summer, but at a significantly lower price level than at the beginning of the year.

Tissue deliveries rebound in Q3 2025

For Metsä Tissue, earnings for hygiene and greaseproof papers improved in the third quarter 2025 compared to both the previous quarter and the same period last year, bolstered by higher delivery volumes and lower costs. Metsä Tissue’s sales amounted to €844.4m (€862.6m). Ebitda fell year-on-year to €70.7m (€108.6m), while operating profit more than halved to €34.5m (€73.4m). The decline in sales reflected weaker deliveries in the first half of the year, while third quarter sales volumes increased slightly and exceeded last year’s figures. The division continued to implement market-related production cuts. Tissue paper deliveries totalled 339,000 t (345,000 t). Group CEO Jussi Vanhasen expressed satisfaction that the new tissue paper mill in Mariestad, Sweden, began customer deliveries on schedule.

In the wood supply and forest division (Metsä Forest), the group reports higher sales revenue due to rising wood prices. Timber trade in Finnish private forests was buoyant in the first half of the year, but slowed down after the summer season. While lumber prices reach a record high in the second quarter, they declined in Q3. The group expects wood prices to remain at a high level in the long term. For the group’s wood products business (Metsä Wood), sales volumes decreased by 13 per cent compared with 2024. Overall, Metsä Wood posted a loss of €11.1m for the January-September period, following a profit of €17.9m in the 2024 reference period.

Metsä Group targets higher profitability

Metsä Group reported a net loss of €91.9m for the first nine months of 2025, compared with a loss of €98m a year earlier. Consolidated sales rose to €4.51bn (2024: €4.27bn).

“We need to significantly improve Metsä Group’s results,” said President and CEO Jussi Vanhanen. In July, the company announced a €300m cost-cutting programme, for which planning has now been completed. Most of the savings are to come from optimising variable costs. The measures are expected to gradually support earnings from early 2026, with full effect anticipated in 2027.

Metsä Group results				
million €	July - September		January - September	
	2025	2024	2025	2024
Key figures				
Sales	1,440	1,336	4,508	4,273
EBITDA	64	222	314	492
Operating result	-69	111	-63	157
Net result	-70	78	-92	98
Business area review				
Paperboard Industry (Metsä Board)				
Sales	441	499	1,382	1,493
EBITDA	-17	66	33	149
Operating result	-45	42	-70	64
Net result	-43	32	-70	42

Deliveries, 1,000 t				
Folding boxboard	216	268	704	770
White Kraftliner	116	120	356	360
Market Pulp	94	82	280	313
Pulp and Sawn Timber Industry (Metsä Fibre)				
Sales	633	527	2,010	1,686
EBITDA	16	139	143	188
Operating result	-68	77	-61	8
Pulp deliveries, 1,000 t	735	467	2,216	1,758
Sawn timber deliveries, 1,000 t	361	378	1,053	937
Tissue and Greaseproof Papers (Metsä Tissue)				
Sales	280	281	844	863
EBITDA	33	28	71	109
Operating result	21	16	35	73
Tissue paper deliveries, 1,000 t	115	113	339	345
Wood Supply and Forest Services (Metsä Forest)				
Sales	533	592	1,912	1,757
EBITDA	7	10	31	29
Operating result	5	8	27	26
Wood deliveries (1,000 m ³)	6,299	7,279	22,870	22,512
Wood Products Industry (Metsä Wood)				
Sales	114	126	369	422
EBITDA	-2	8	9	34
Operating result	-7	3	-11	18
Engineered wood products deliveries (1,000 m ³)	92	88	304	304
Other operations				
Sales	14	15	58	60
EBITDA	3	2	2	-3
Operating result	0	-1	-6	-12
Source: Metsä Group, Metsä Board				

Italy postpones plastic tax again

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The Italian government wants to postpone the so-called **plastic tax** for the eighth time. The budget for 2026 states that it will remain suspended until 31 December 2026, meaning that it cannot come into force until 2027. The levy was originally supposed to apply from July 2020, but was repeatedly postponed. The tax relates to single-use plastic packaging as well as semi-finished products such as preforms. It exempts packaging made from compostable plastics, packaging materials for medical articles as well as recyclates. The tax amounts to €0.45/kg.

STI Group commissions new solar power plant at Kecskemét folding carton plant

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German **STI Group** has invested in a new photovoltaic installation at its folding carton plant in Kecskemét, Hungary. With an investment of around €2m, some 5,000 solar panels now supply the production site with an output of 2.14 MWp, making the plant nearly energy-self sufficient. According to the company, the Kecskemét plant employs around 460 people and produces about 30,000 t of folding cartons and 10 million m² of labels per year for the pharmaceutical, food and non-food industries.

Folbb announces new distribution partner for Greece and Cyprus

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Folbb is strengthening its cartonboard distribution in the Mediterranean region. **Stark Paper** has become the distributor for products of the fresh fibre board manufacturer in Greece and Cyprus from 1 October 2025. Stark Paper describes itself as a distributor of pulp, paper and board for the Greek market. In addition to fresh fibre and recycled board, its portfolio includes kraft and sack kraft paper as well as corrugated case material, speciality paper and label papers.

Folbb launches new GC 1 board grade

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Cartonboard producer **Folbb** has launched a new GC 1 board called Accurate Top White. The new grade is produced at Folbb's Eerbeek plant in the Netherlands. According to the company, it has been specifically developed for high-end packaging and graphic printing applications and is suitable for use in segments such as cosmetics, perfumes, chocolate, (fast) food, and pharmaceuticals. The new board comes in grammages between 180 and 350 g/m².

Graphic Packaging's CFO joins Amcor

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Stephen R. Scherger, CFO and executive vice-president of Graphic Packaging International (GPI) since 2015, is leaving the company to join Amcor. Starting 10 November, he will replace **Michael Casamento**, who will leave Amcor. Until 30 June 2026, he will work for the company in an advisory capacity to facilitate the transition. The CFO's position at GPI will be filled by **Charles D. Lischer** on an interim basis. Mr Lischer has been with GPI since 2019.

MM Board & Paper has a new CSO

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Jürgen Kleinrath is the new CSO (Chief Sales Officer) of cartonboard manufacturer **MM Board & Paper**, the board subsidiary of Austria's MM Group. Mr Kleinrath succeeded Thomas Kratochwill and assumed his new position in September, a company spokesperson told EUWID.

Stora Enso posts higher Q3 operating profit but ramp up costs in Oulu burden results

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Finnish forestry and paper group Stora Enso posts slightly higher third quarter sales and a significantly improved operating result despite difficult market conditions. Sales revenues increased by 1 per cent year-on-year to €2.28bn (Q3 2024: €2.26bn). The operating profit rose to €231m, compared with €139m in the same quarter of the previous year, while the net profit stood at €201m, compared with €84m in the previous year.

The reporting period was marked by the start-up of the new board machine at the Oulu mill in Finland, which had an estimated negative earnings impact of around €45m, according to the company. Stora Enso said that production volumes are gradually increasing, though slightly behind the original schedule. The Ebitda break-even point is still expected to be reached by the end of the year. The new line is designed for an annual capacity of 750,000 t of folding boxboard (GC) and bleached uncoated kraft board (CUK) and is expected to reach full capacity by 2027.

In September, Stora Enso completed the sale of 175,000 ha of Swedish forest land, representing approximately 12 per cent of the group's Swedish forestry assets. The transaction, valued at around €900m, has strengthened the company's balance sheet and reduced its debt ratio, Stora Enso said. In parallel, the group has launched a strategic review of its remaining Swedish forest holdings, which includes the option of a potential spin-off and stock market listing.

Despite persistently weak demand and ongoing price pressure for pulp and packaging, Stora Enso said it remains in a stable position.

CEO Hans Sohlström said in his comment that the company intends to further improve profitability in the coming months through cost efficiencies, a leaner organisational structure and a stronger focus on its core renewable packaging business.

Lower earnings in Packaging and Biomaterials amid weak markets

In the Packaging Materials division, market conditions remained difficult in the reporting period, Stora Enso reports. Earnings were affected by lower selling prices, unfavourable exchange rates due to the weaker US dollar, and persistently high raw material and logistics costs. These factors could be offset only partially by additional sales revenues from the new board line at the Oulu mill. As order inflow continued to decline, Stora Enso adjusted capacity utilisation and cost structures to match demand. Despite these measures, earnings receded due to ramp-up costs and muted market demand.

The Biomaterials segment also continued to suffer from low pulp prices and weak demand, especially in Europe, Stora Enso says in its annual report. While prices stabilised during the reporting period, they remained at a low level. Sales declined as a result of lower selling prices and negative currency effects, partially offset by higher deliveries.

Demand for eucalyptus pulp increased in both Europe and China, while demand for softwood pulp was weaker in Europe. Overall, prices for all pulp grades remained under pressure in both regions.

The Packaging Solutions division achieved slightly better results despite the challenging business environment. Higher selling prices, an improved product mix and lower depreciation and amortisation after impairments at the end of 2024 supported profitability in the third quarter, the group reports.

Stora Enso results				
million €	July - October		January - October	
	2025	2024	2025	2024
Key figures				
Sales	2,283	2,261	7,072	6,727
Adjusted EBITDA	291	328	889	938
Operating result	231	139	466	372
Net result	201	84	323	195
Business area review				
Packaging Materials				
Sales	1,128	1,169	3,446	3,407
Adjusted EBITDA	120	147	351	400
Operating result	23	62	100	133
Consumer board deliveries*, 1,000 t	725	711	2,149	2,102
Containerboard deliveries*, 1,000 t	309	307	983	956
Paper and board deliveries*, 1,000 t	151	170	421	471
Packaging Solutions				
Sales	263	262	775	740
Adjusted EBITDA	18	13	59	50
Operating result	-5	-8	-1	-15
Corrugated packaging European deliveries*, million m ²	312	317	929	926
Biomaterials				
Sales	339	380	1,110	1,168
Adjusted EBITDA	59	74	186	263
Operating result	25	46	89	170
Market pulp deliveries*, 1,000 t	554	521	1,701	1,594
Wood Products				
Sales	440	359	1,352	1,122

Adjusted EBITDA	5	8	38	27
Operating result	-8	-3	4	-5
Wood products deliveries*, 1,000 m ³	999	876	3,143	2,753
Forest division				
Sales	750	695	2,419	2,043
Adjusted EBITDA	92	96	292	270
Operating result	210	69	341	180
Wood deliveries*, 1,000 m ³	8,165	8,104	26,522	24,960
Other				
Sales	48	37	144	129
Adjusted EBITDA	-2	-14	-32	-53
Operating result	-12	-31	-62	-73
* external deliveries				
Source: Stora Enso				

Metsä Group targets Kemi as site for Kuura fibre plant

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Metsä Group has selected its Kemi site in northern Finland as the potential site for its first commercial Kuura textile fibre factory, the company announced. The decision follows a comparative study of several potential locations, taking into account factors such as earthworks, logistics, energy supply and the integration of the plant with Metsä's existing bioproduct mill, which would enable closed-loop operations. A final investment decision is yet to be made.

Metsä Group has been developing wood-based textile fibres produced entirely without fossil fuels at its trial mill in Äänekoski since 2020. The Kuura fibre can be used for both clothing and technical textiles and represents a possible new product line for the group.

In February 2025, the company launched a pre-design project for a commercial-scale Kuura plant. The selection of Kemi marks the completion of the site evaluation phase. The current planning stage also includes refining the fibre production process, preparing a business and market-entry strategy, exploring financing options and securing an environmental permit.

Navigator receives EIB loan for decarbonisation projects

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Rising energy costs and growing political pressure to embrace sustainability are forcing pulp and paper companies to fundamentally rethink their production processes. The Portuguese pulp and paper manufacturer, The Navigator Company, aims to position itself as a leader in green transformation and has just secured an €80m loan from the European Investment Bank (EIB) to fund its efforts. The loan for the first tranche, amounting to €40m, has already been signed.

The loans will be used to implement initiatives that speed up Navigator's decarbonisation programme by improving energy efficiency and achieving significant reductions in greenhouse gas emissions. The company aims to completely decarbonise its industrial complexes by 2035 and be climate-neutral around 15 years ahead of the EU's climate targets.

Planned projects include installing new CHP plants and photovoltaic systems, converting existing lime kilns to biomass and constructing a new biomass boiler. Navigator is also backing the development of innovative, bio-based packaging that uses eucalyptus pulp as a sustainable alternative to fossil-based plastics. Last year, Navigator commissioned a pilot plant for the production of moulded fibre packaging in Averio.

Back in 2023, the EIB provided Navigator with a €115m loan to build a new recovery boiler at its site in Sétubal.

Navigator is a manufacturer of eucalyptus pulp, uncoated printing and writing paper, and tissue products. The group operates facilities in Sétubal, Cacia, Figueira da Foz and Vila Velha de Ródão. Navigator reports having a total capacity of 1.6 million tpy of paper, 1.5 million tpy of eucalyptus pulp, around 80 per cent of which is used in-house for paper production, and 165,000 tpy of tissue.

Europe's commercial printing industry benefits from e-commerce and sustainability trend

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The European market for commercial printing is showing slight growth again after protracted stagnation. According to a recent analysis by market research company Market Data Forecast, total market volume will touch \$111bn in 2025 and rise to around \$142bn by 2033, representing average annual growth of 3.1 per cent. The analysts attribute the positive development primarily to the boom in online retail, growing demand for personalised print products and the trend towards more sustainable production processes.

According to Market Data Forecast, one focus area is increasingly packaging printing, which now accounts for around 35 per cent of total industry sales. Bespoke packaging is showing particularly strong growth. In classic advertising and label printing, many companies rely on small batch sizes, variable data and digitised production processes to meet greater demand for individualised products.

At the same time, sustainability continues to gain in importance. Market Data Forecast says that around 40 per cent of European printers are now using recycled paper and plant-based inks to meet stricter environmental regulations and rising customer expectations. In addition, there is regulatory pressure from EU-wide requirements, such as the new Packaging and Packaging Waste Regulation (PPWR), which mandates manufacturers to use more recyclable materials and more efficient processes.

According to the analysts, high energy and raw material costs and the structural decline in traditional print products remain a burden, putting considerable pressure on the margins of medium-sized companies. At the same time, digital communication channels, especially in the advertising market, continue to displace print formats.

Advances in digital printing, AI-supported process control and automated order processing, on the other hand, open up new efficiency potential and business models, the analysts add. According to the study, applications in sustainable packaging and bespoke printing, which are considered key growth drivers of the European printing market by the end of the decade, are developing particularly dynamically.

German paper sack industry records higher deliveries in first half of 2025

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German paper sack manufacturers sold more in the first six months of 2025 than in the same period of the previous year. Despite challenging economic conditions, the industry remains optimistic about the months ahead, reported the industry association Gemeinschaft Papiersackindustrie (Gempsi) in early October.

A survey conducted among Gempsi members in September 2025 revealed that companies continue to face strong competition and growing regulatory pressure but also see new opportunities. Initial positive signals at individual manufacturers are said to indicate a gradual market recovery, supporting expectations for a solid business year.

Overall, deliveries in the German paper sack industry increased by 7.8 per cent year-on-year in the first half of 2025. The strongest growth was reported in the “diverse” segment (e. g. garden waste, +23.3 per cent), food excluding milk powder (+21.9 per cent), seed (+20.8 per cent) and animal feed (+18.2 per cent). Demand for paper sacks for chemicals rose by 5.7 per cent, for minerals by 5.3 per cent, and for cement by 4.7 per cent. More modest growth was seen in the building materials (+1.9 per cent) and milk powder (+0.2 per cent) segments.

Business situation rated as satisfactory

According to Gempsi, member companies rated their business situation in the first half of 2025 as “satisfactory,” with an average score of 3 points on a scale from 1 (poor) to 5 (very good). Half of the surveyed companies reported stable order intake, one-third noted an increase, and the remaining companies saw declining orders compared with the previous year.

A strong order intake in the first quarter contributed positively to results, driven mainly by higher demand from certain customers. Despite this improvement, the German paper sack industry continues to operate in a demanding environment marked by inflation-related cost pressure and intensifying regulation.

For the second half of the year, two-thirds of member companies expect business to remain stable, while one-third anticipate slight growth. Overall business expectations average 3.173 points, roughly matching the first-half level. However, sales forecasts diverge: one-third of companies expect moderate to significant increases, one-third stability, and one-third declines.

EU DR and PPWR remain key concerns

Regulatory uncertainty continues to be a major issue for both paper sack producers and their customers. In particular, the EU Deforestation Regulation (EUDR), the EU Packaging and Packaging Waste Regulation (PPWR), and various supply chain laws still raise many questions regarding implementation, the association noted.

Additional uncertainty is being caused by the US tariff policy, while strong competition from Chinese chemical companies is putting pressure on the European chemical sector, which could lead to further production cuts in Europe and thus declines in demand for bags for the chemical industry, the association warned.

Sentiment in German market for woodfree papers remains gloomy

October brings further small price cuts for brown kraftliner

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Order volumes in the woodfree paper segment remain fiercely contested at the end of October. The sector continues to be shaped by intense competition, which is weighing on overall sentiment amid ongoing price reductions. The ruinous price war has pushed prices even lower without boosting print volumes. Instead, even previously stable sub-segments have suffered.

The situation is somewhat less dramatic on the market for kraftliner. While small price reductions were also reported recently for brown grades, manufacturers can rely on strong international business.

Growing criticism of fine paper business climate

The German market for woodfree uncoated and coated papers remains highly competitive in October. Ongoing consolidation and restructuring in the paper wholesale trade in Germany and across Europe have led to fierce competitive pressure, observers say. Companies lack a convincing growth scenario, and attempts to gain market share against the current demand trend are further worsening sentiment.

Some experts noted that a few players in the paper, paper trading and printing industries had overreacted in recent months. Summer business was weak and no typical seasonal upturn emerged. Still, September and October brought some revival, albeit not at the level required. Printers report relatively good order levels for November, and the pace of demand erosion appears to be slowing.

Nevertheless, paper applications continue to decline due to digitalisation – a development that comes as no surprise. Despite this continued negative development, there are still functioning print orders that deserve more attention and support, industry insiders stress. They call for a rethink, since current strategies have mainly resulted in margin losses. The ruinous competition had lowered prices even further without improving print volumes, and even healthy niche segments had been affected, these insiders said.

Against this backdrop, industry observers contrast the “print is dead” narrative with signs of “new dawn”. The paper industry is at least actively shaping the necessary restructuring, they say. While past and planned capacity reductions may not be sufficient, mills are moving towards further measures intended to stabilise the market. There is, as some put it, “light at the end of the tunnel.”

Critics also point out that, under current conditions, nobody is making money – not mills, not wholesalers, and not printers. The sector should use the crisis to recover and restore healthy structures. This includes halting the recent price erosion for both coated and uncoated fine papers – but not swinging to the opposite extreme, suppliers add, already looking ahead to the first-quarter 2026 price talks.

The price spiral continued to move downward in October, albeit at a slower pace. Depending on the starting level, reductions of €10-20/t were reported. While there are first signs of stabilisation in the art paper segment, battles over copy paper and offset grades are still ongoing. Overall, however, the bottom seems to have been reached, and industry sources believe there is no further room for downward adjustment in fine paper prices. Even overseas deliveries have stabilised given the low European price levels, with observers expecting a reduction in Asian paper supply.

Slight price reduction for brown kraftliner

Demand for corrugated packaging did not pick up as hoped after the holiday period. Kraftliner producers are also struggling for volumes and orders, although conditions for fresh fibre-based containerboard grades are much more favourable than for recycled grades, which face heavy overcapacity. Converters report good availability across all kraftliner grades, with even short-term needs being quickly met. Yet kraftliner continues to benefit from strong international business, particularly after a number of capacity reductions in North America.

October often saw price reductions of around €10/t for brown kraftliner in Germany, depending on the starting price. In isolated cases, prices came down by €20/t. This latest reduction did not affect all buyers equally – converters who paid the full €40/t increase in summer reportedly received a later adjustment, resulting in a total decline of around €30/t between September and October. Overall, however, price levels have remained largely stable over the past six months.

White-top kraftliner prices remain relatively steady, with October prices unchanged from the previous month. Some contacts report minor reductions negotiated in September, but these were not widespread.

For semi-chemical fluting, reports vary: Some buyers mention occasional minor adjustments up or down during the year, but overall this niche segment remains calm, with most EUWID contacts reporting stable October prices.

By late October, annual budget negotiations with converters were already in full swing, mainly focusing on volume commitments for 2026. Order intake from Western Europe continues to lag behind expectations, while demand from several Eastern European countries remains stronger, with attractive growth prospects ahead.

Brown recovered paper grades in the UK feeling the pinch from new Chinese policy

New import rules for recycled pulp intensify pressure on prices in Europe, too

 29 October 2025 |  ~ 4 min | [Published in issue 44/2025](#)

The direction taken by bulk grades on the British recovered paper market was unmistakably shaped by changes to rules governing dry recycled pulp imports into China. Chinese authorities suspect that dry recycled pulp might be heavily contaminated.

EUWID Price Watch Recovered Paper UK October 2025				
Prices in £ per tonne	Oct 2025 £	Oct 2025 €*	Sep 2025 £	Oct 2024 £
Mixed paper and board (1.02)	40 - 65	46 - 75	50 - 70	50 - 73
Mixed paper and board (1.02), export	50 - 58	58 - 66	55 - 78	50 - 80
Old corrugated containers (1.05)	85 - 99	98 - 114	90 - 102	85 - 100
Old corrugated containers (1.05), export	85 - 104	98 - 120	93 - 105	90 - 100
Magazines (1.06) [†]	90 - 122	104 - 140	90 - 125	100 - 160
Sorted graphic paper for deinking (1.11) [†]	80 - 95	92 - 109	80 - 100	95 - 120
Newspapers (2.01) [†]	95 - 112	109 - 129	95 - 115	110 - 145
Sorted office paper (2.05)	115 - 145	132 - 167	145 - 157	175 - 185
Multipurpose	135 - 160	155 - 184	160 - 170	170 - 190
White newsprint (3.14)	170 - 200	196 - 230	175 - 205	210 - 220
White woodfree uncoated shavings (3.18.01)	290 - 355	334 - 408	330 - 375	380 - 410

* Exchange rate as of 24 October 2025: £1 = €1.15

[†] Includes exports and non-paper applications

Prices ex works, material sorted and in bales

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EUWID assumes no liability for the accuracy of pricing information.

According to a notice from customs authorities, importers have had to state whether their pulp was made using a dry or wet process since 10 October. At the same time, all imports of dry recycled pulp were halted for a time in Chinese ports and subjected to rigorous inspections, including laboratory tests. Affected companies said that these tests could take four to six weeks. Goods are left sitting at the port during this period.

In the wake of this development, one major Chinese paper group’s purchasing arm notified suppliers that it was putting its purchases of recovered paper on hold for the time being.

At first, the restrictions mostly affected North American recovered paper, as this is mainly used to produce dry recycled pulp in Asia, which is then shipped to China. US material was redirected to other outlets at short notice and offered there at significantly reduced prices.

Market players told EUWID that US material was trading in India for around US\$20/t less than British goods, even though it is usually more expensive because of its higher fibre quality. These shifts sent export prices for British old corrugated containers (OCC; 1.05) tumbling by £5-10/t within just one day.

Since the majority of OCC had already been sold at the start of October, the full knock-on effects of China’s actions will likely not be felt until November.

In early October, exports from the UK to Asia were mostly priced at £98-102/t, while shipments to the EU fetched £92-97/t, which was slightly higher than the price paid on the domestic British market.

<https://www.euwid-paper.com/news/markets/brown-recovered-paper-...des-in-the-uk-feeling-the-pinch-from-new-chinese-policy-291025/>

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Once news of the new Chinese rules emerged, prices sometimes dropped below £90/t. Turkish paper mills paid up to £104/t at the start of October.

However, observers warn against overstating the impact of Chinese policy. They note that several minor factors had come together to intensify the downward trend.

Another decrease in OCC export prices, bringing the price level to below £80/t, is thought to be on the cards for November. Sources described this as a “correction” since prices had previously been artificially buoyed by fears of export-driven outflows of recovered paper. Prices for US material had reportedly been under pressure even before recent developments, with the latest news simply hastening the decline.

There are signs that conditions in Chinese ports are beginning to ease, with inspections and lab checks now reportedly moving more quickly, according to market sources. Nonetheless, market players do not expect any noticeable price hikes for OCC before February or March 2026 at the earliest.

The season of high recovered paper arisings is now getting underway in the UK, but there remains a lack of momentum in global finished paper markets. In India, business has paused for the Diwali festival, while China’s New Year celebrations are set for late February, impacting shipments from December.

Recent developments have also seen prices for mixed paper (1.02), supermarket paper and board (1.04) and kraft-containing grades drop by £5-10/t in October. EUWID sources expect November to bring additional corrections.

Steep fall in prices for high white and woodfree grades in October

Prices for woodfree and high-white grades have come under considerable pressure. Insiders told EUWID that it was hard to find buyers at all for white woodfree shavings (3.18). A few transactions were reportedly negotiated at heavily reduced prices, with mark-downs sometimes reaching up to £20-40/t. White newsprint (3.14) prices were a little more stable, something that experts attributed to deinking and wood-containing grades being more resilient.

Lower prices for grade 3.18 also left their mark on prices for sorted office paper (2.05). While a few tissue producers managed to lower prices for October and November by £10/t early this month, later transactions pushed the lower end of the price range down even further. Multigrade also became cheaper, something that market players attributed to one major customer being reluctant to make purchases due to (short-lived) production issues.

By comparison, deinking grades (1.11, 1.06, 2.01) were fairly stable, with prices dipping only slightly, by around £5-10/t.

Publication paper prices nearly stable, fine papers prices under pressure in UK market

Containerboard prices mostly stable / cartonboard prices softening

 29 October 2025 |  ~ 10 min | [Published in issue 44/2025](#)

Publication paper prices in the UK were largely rolled over into the fourth quarter, with only minor downward adjustments reported for magazine paper grades. The fine paper market continues to face price pressure, particularly in the woodfree uncoated paper segment, despite a slight pick-up in demand in October.

EUWID Price Watch UK				
October 2025				
Prices in £ per tonne less delivered unless otherwise stated	October 2025 £	October 2025 €*	September 2025 £	October 2024 £
Fine paper				
Woodfree uncoated				
Copy paper 80 g, 84 g grade	760 - 820	878 - 903	770 - 840	880 - 1,000
Copy paper 80 g, 84 g grade	720 - 800	826 - 920	730 - 810	860 - 930
Other news 80 g	800 - 870	902 - 1,001	820 - 880	950 - 1,070
Other news 80 g	740 - 810	851 - 952	760 - 820	890 - 970
Woodfree coated				
News, double coated, 110 g	840 - 900	946 - 1,035	860 - 920	980 - 1,090
News, double coated, 110 g	770 - 830	886 - 953	780 - 840	890 - 950
Publication paper				
Standard newspaper 40 g	480 - 510	552 - 587	480 - 510	480 - 510
Standard newspaper 40 g	480 - 520	544 - 598	480 - 520	480 - 520
Standard newspaper 40 g	500 - 530	575 - 610	500 - 530	500 - 530
Improved newspaper 32 g, 30/40	530 - 560	610 - 644	530 - 560	530 - 560
LWC offset 80 g	680 - 690	790 - 799	680 - 700	680 - 730
XC offset 90 g, 80	580 - 605	657 - 696	580 - 610	600 - 640
Corrugated case material				
Primary fibre corrugated case material				
Unbleached kraftliner 150 g, European quality	690 - 740	799 - 875	690 - 740	710 - 770
White top kraftliner 140 g, European quality	800 - 875	936 - 1,036	800 - 875	830 - 890
Recycled corrugated case material				
Recycled fluting 100 g	530 - 575	610 - 661	530 - 580	560 - 595
Recycled fluting 100 g	530 - 580	610 - 667	530 - 580	560 - 600
Recycled fluting 80 g	540 - 590	621 - 679	540 - 590	575 - 610
Testliner B	530 - 580	610 - 664	530 - 580	560 - 610
Testliner B	530 - 575	610 - 661	530 - 580	560 - 595
White top kraftliner grade B, 140 g	640 - 700	736 - 803	640 - 700	670 - 730
Cartonboard				
GG1	670 - 680	690 - 719	660 - 680	660 - 720
CC1	880 - 1,010	1,022 - 1,152	890 - 1,010	920 - 1,030
* Exchange rate as of 24 October 2025: £1 = €1.12				
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Prices for corrugated case material mostly remained unchanged in October. However, due to overcapacity on the Continent, some converters were able to negotiate slightly lower prices for brown recycled containerboard. Activity in the cartonboard market remained subdued in October, with prices continuing to soften.

Demand for fine paper on the slow side despite signs of a minor recovery

Woodfree printing and writing paper producers are reporting that order intake has picked up a little in the UK in October. These sources added that they expected this typical seasonal recovery to stick around for the remainder

EUWID Price Review UK				
Third quarter 2025				
Prices in £ per tonne less delivered unless otherwise stated	Third quarter 2025	Second quarter 2025	Third quarter 2024	
Recovered paper (prices on weight)				
Mixed paper and board 1,100	50 - 75	55 - 90	50 - 85	50 - 85
Mixed paper and board 1,100, export	55 - 80	55 - 95	50 - 85	50 - 85
Old corrugated containers (OCC)	80 - 102	87 - 118	80 - 120	80 - 120
Old corrugated containers (OCC), export	90 - 105	95 - 132	90 - 120	90 - 120
Magazines 1,000	80 - 110	85 - 140	80 - 140	80 - 140
Sorted graphic paper for printing 1,100	80 - 110	80 - 110	80 - 125	80 - 125
Newspapers 1,000	80 - 120	85 - 130	80 - 130	80 - 130
Sorted office paper 1,100	140 - 175	140 - 175	175 - 200	175 - 200
Multipurpose	140 - 175	140 - 180	175 - 200	175 - 200
White newspaper 1,100	175 - 220	180 - 220	210 - 240	210 - 240
White newspaper sorted (average 1,100)	180 - 240	180 - 420	180 - 420	180 - 420
Fine paper				
Woodfree uncoated				
Copy paper 80 g, 84 g grade	770 - 860	820 - 890	880 - 1,000	880 - 1,000
Copy paper 80 g, 84 g grade	730 - 810	780 - 860	840 - 970	840 - 970
Other news 80 g	800 - 820	880 - 920	920 - 1,070	920 - 1,070
Other news 80 g	740 - 810	800 - 880	860 - 970	860 - 970
Woodfree coated				
News, double coated, 110 g	850 - 940	890 - 940	940 - 1,010	940 - 1,010
News, double coated, 110 g	780 - 830	860 - 900	880 - 930	880 - 930
Publication paper				
Standard newspaper 40 g	480 - 510	480 - 510	480 - 510	480 - 510
Standard newspaper 40 g	480 - 520	480 - 520	480 - 520	480 - 520
Standard newspaper 40 g	500 - 530	500 - 530	500 - 530	500 - 530
Improved newspaper 32 g, 30/40	530 - 560	530 - 560	530 - 560	530 - 560
LWC offset 80 g	680 - 700	680 - 700	680 - 730	680 - 730
XC offset 90 g, 80	580 - 610	580 - 610	600 - 640	600 - 640
Corrugated case material				
Primary fibre corrugated case material				
Unbleached kraftliner 150 g, European quality	690 - 770	720 - 770	690 - 770	690 - 770
White top kraftliner 140 g, European quality	800 - 875	780 - 875	790 - 880	790 - 880
Recycled corrugated case material				
Recycled fluting 100 g	530 - 605	530 - 605	560 - 605	560 - 605
Recycled fluting 100 g	530 - 610	530 - 610	560 - 610	560 - 610
Recycled fluting 80 g	540 - 620	540 - 620	575 - 610	575 - 610
Testliner B	530 - 625	530 - 625	560 - 610	560 - 610
Testliner B	530 - 610	530 - 610	560 - 595	560 - 595
White top kraftliner grade B, 140 g	640 - 710	640 - 710	670 - 730	670 - 730
Cartonboard				
GG1	680 - 690	620 - 715	650 - 720	650 - 720
CC1	910 - 1,010	920 - 1,010	960 - 1,010	960 - 1,010
* Exchange rate as of 24 October 2025: £1 = €1.12				
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of this year. That being said, they also concede that demand remains well below production capacity and thus unsatisfactory. One producer remarked it was hoping that the slump in demand would return to the more usual annual rate of four to five per cent seen in the past.

Yet even a moderate decline in demand is untenable for paper manufacturers given current capacity levels. Constantly operating at an average of 80 per cent of their capacity was too costly and left producers under competitive pressure, sources noted.

This is reflected in the latest movement in prices. Even though companies continue to curb output because of the market environment, competition among suppliers remains fierce, especially for uncoated paper, where there are more producers than in the adjacent market for coated paper. Insiders pointed out that this was not only due to competition from non-European manufacturers, as European producers themselves were also vying for orders by offering low prices.

Market players interviewed by EUWID summed up pricing in October by saying that quotes had stabilised somewhat but remained under pressure. Some said that they had managed to hold on to September's prices thanks to brisker business in October. Others reported that order intake had picked up, but the overall situation remained challenging, and prices remained under pressure. Competitive prices for 80 g C-grade A4 copy paper are in the region of £720-730/t, although prices around £800/t are still being quoted at the upper end. 70 g paper in plain, unprinted packaging is currently on offer at about £650/t.

Experts painted a similar picture for uncoated reels, with lots of paper selling for prices starting at about £750/t. However, spot offers were only a little over £700/t. The lowest prices for folio sheets were quoted at roughly £800/t.

The woodfree coated paper market seems to be experiencing somewhat less pressure on prices at the moment. Nonetheless, several sources described the trend in this market segment and its prices as a "bloodbath" over the past few weeks and months. Some prices were quoted at the same level as in September, with some small price cuts also mentioned.

Sources anticipate relatively good business over the next couple of months, as is typical for the season, with several optimistic producers also forecasting stable prices between now and the year's end. Non-integrated paper manufacturers, especially, are finding it increasingly difficult to lower their prices any further.

Publication paper prices often left unchanged in Q4

Stable or slightly lower prices were the outcome of negotiations to settle on fourth-quarter publication paper prices in the UK. Most newsprint prices were simply rolled over from the third to the fourth quarter, with some six-month agreements also in effect. Quite a few magazine paper prices dipped marginally, especially towards the upper end of the price bracket.

Major customers are paying a little under to slightly over £500/t for 42.5 g standard newsprint. The lower end of the price spectrum for 56 g SC-A paper hovers around £580/t, although lower prices have also been quoted. Sources continued to mention £660/t as the price floor for 60 g LWC.

The next round of negotiations, which is set to happen in November and December, will cover all prices from January 2026 and show where the market is headed, according to market players. Between now and then, they expect that scheduled or already completed capacity closures might already leave their mark. Other insiders do not expect these projects to have a noticeable impact until the second quarter of 2026. At any rate, paper producers described these actions as a big step in the right direction.

After all, as all market players stressed, Europe still had far too much production capacity, especially for magazine paper.

Demand continues to trend lower in the publication and commercial printing businesses alike. Industry sources reported that the UK was seeing a particularly steep drop in publication paper consumption. Although a minor seasonal upturn is currently being observed, the underlying trend remains one of a persistent decline in demand.

As such, market attention has shifted to the supply side, where capacity closures have recently been announced or have already been implemented. Significant capacity cutbacks are planned at Sappi's Kirkniemi mill and UPM's Kaukas and Ettringen mills. However, industry observers note that these measures are still not sufficient to restore the market to a state of balance. Further announcements to this effect are expected over the coming months.

In this context, the cost position of the mills in question will play a key role. Current selling prices are already clearly too low for some production sites, leaving no room for further reductions. Whether a mill is integrated is also seen as a decisive factor in its economic survival.

Paper manufacturers hope that already announced capacity closures, along with more to come, will create market conditions that allow for prices to rise again. For this to happen, additional decisions needed to be made quickly, as paper consumption continued to decline steadily across the UK and Europe, they said.

UK corrugated market more dynamic than expected

The British market for corrugated board sheets and packaging showed unexpectedly high activity in October, though this was driven less by stronger demand for paper and more by converting bottlenecks. An increase in paper prices had never really been on the agenda in the UK. Announcements of price hikes on the continent were met largely with disbelief.

When the planned increase was called off in mid-October, this was little more than a side note in the UK, since the market there – unlike in previous years – had already failed to follow continental developments and thus effectively “anticipated” the price increase reversal that later happened on continental markets.

Domestic suppliers said they had kept their prices for recycled corrugated case material stable, although some cheaper offers from continental Europe were reportedly available due to increased paper capacity there. Some customers were therefore able to reduce their prices for brown recycled containerboard by another £5-10/t. Prices for other grades (kraftliner and white-top testliner) remained unchanged.

At the same time, market insiders spoke of “hectic” activity in the corrugated sheet market, with lead times stretching from the usual three days to as much as ten. However, this was reportedly not due to any real rebound in demand but to production bottlenecks.

Capacity for corrugated sheets and packaging in the UK had already been reduced earlier in the year, which had improved utilisation for other suppliers. In October, one large manufacturer reportedly encountered temporary delivery disruptions due to software problems. Another producer was heavily tied up with orders from a key customer and either offered new delivery slots only from January or increased its sheet prices by up to 20 per cent. This situation benefitted smaller competitors.

Many of these smaller players had already reported satisfactory capacity utilisation in September – not least thanks to reduced overall processing capacity – and were expecting a “fairly positive fourth quarter.” The latest developments have also allowed them to raise prices here and there and ease some margin pressure.

Nevertheless, this positive trend needs to be seen in the context of an overall weak 2025, when the market will grow only marginally. “It could be much better, but also much worse,” commented producers of corrugated packaging and displays.

Little seasonal demand on British market for cartonboard

Market dynamics for cartonboard in the UK have changed little compared to the previous month. Demand remains weak, with hoped-for seasonal impulses from Halloween and Christmas failing to materialise or falling short of expectations.

At the same time, supply remains abundant, supported by new capacity in Europe and continued high imports from Asia. In addition to Stora Enso's new board machine in Oulu, Metsä Board's Simpele mill is now back on stream following modernisation. According to the company, the rebuild has primarily improved the quality of its “FBB Classic” product. However earlier information also suggested an increase in capacity of around 10,000 tpy.

Asian suppliers, who in the past shipped to the UK only sporadically depending on market conditions and costs, are now more consistently present. They have established closer relationships with British merchants and end users. Market observers say that, as feared, volumes originally destined for the US market are now being diverted to Europe due to high US import tariffs. There are said to be Asian board machines specifically configured for the US and European markets.

Low and relatively stable freight rates continue to support these imports. However, awareness of the vulnerability of transport routes and the potential volatility of freight rates remains high among converters and end users in the current geopolitical environment. As a result, the penetration of Asian suppliers into the UK market is growing, but remains limited.

Their sometimes extremely low prices, however, continue to put strong pressure on the market and are now influencing the price structure of European producers as well. Accordingly, European producers' prices have softened further. The lower end for European-made GC 2 board is now below £900/t. Prices for special deals and Asian material are significantly lower still. Some European suppliers are also said to have gone beyond their pain threshold to match these prices to defend volumes.

The market for GD board in the UK is under even greater pressure. Substitution – either by GC board or by plastics – is becoming increasingly likely. As a result, prices at both the upper and lower ends of the range have eased further.

Many players already see this as a sign ahead of the annual budget negotiations, which usually start in November. It will therefore be interesting to see to what extent board producers are willing to compromise in order to secure volumes. Producers face the dilemma of having to choose between maintaining volumes and maintaining higher prices – both will not be possible, some market participants say.

Where changes in market dynamics have occurred, these primarily concern the regulatory framework. At the time of research, there was speculation about a possible complete or partial postponement of the implementation of the EU Deforestation Regulation (EUDR). Currently, almost 10 per cent of folding cartons produced in the UK are exported empty to the EU. “If this process becomes too complex or burdensome, production could be relocated to the EU,” one market insider said.

In October, British companies also received their first invoices under the Extended Producer Responsibility (EPR) scheme. While the amounts had been broadly known for some time, the actual “Notification of Liability” reportedly made the financial impact tangible for the first time. “For some, that was a wake-up call,” a market source commented.

This may prompt converters and brand owners to reassess their packaging costs and consider adjustments – a development that brings both risks and opportunities for the paper and board packaging industry. Some positive effects have already been reported, but these mainly benefit primary fibre board and have so far fallen short of expectations in volume terms.

Regardless of whether the additional EPR costs are absorbed or passed along the supply chain, they represent another burden.

Prices soften slightly again on Italian recovered paper market in October

 29 October 2025 | ⌚ ~ 5 min | Published in issue 44/2025

The Italian recovered paper market did not experience any major changes in October. Quotes for ordinary grades, especially old corrugated containers, proved resilient and ticked only slightly lower. However, demand on the domestic market is weak and it is only because of export sales that prices have not fallen more sharply. Smallish mark-downs were also reported for deinking grades and higher recovered paper grades in October.

EUWID Price Watch Recovered Paper Italy October 2025				
Prices in € per tonne	Oct 2025	Sep 2025	August 2025	Oct 2024
Mixed paper and board (1.02)	80 - 95	85 - 100	90 - 105	95 - 105
Supermarket corrugated paper and board (1.04)	85 - 100	90 - 100	90 - 105	100 - 110
Old corrugated containers (1.05)	95 - 105	95 - 110	100 - 115	110 - 120
New shavings of corrugated board (4.01)	110 - 120	110 - 125	115 - 130	135 - 145
Magazines (1.06)	125 - 140	130 - 140	130 - 145	175 - 190
Newspapers (2.01)	165 - 180	165 - 185	170 - 185	175 - 185
White woodfree letters (3.05)	310 - 320	310 - 330	320 - 330	320 - 340
White newsprint (3.14)	300 - 330	300 - 335	310 - 335	330 - 350
White woodfree shavings (3.18)	420 - 450	425 - 455	430 - 455	450 - 470
Prices ex works, material sorted and in bales				
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Recovered paper suppliers considered business to have been satisfactory overall in October. This was especially true for those who are very active on the Far East export market. There were sufficient orders from Asia to offset the lack of demand in Italy, EUWID was told. Players who do not export as much may have had more recovered paper in their yards, but none of the suppliers surveyed complained of problems moving material. Moreover, the weak consumption means that arisings of recovered paper are also quite low, some of them note.

Of course, nobody can deny that demand in Italy is weak right now. Even after the summer, there have been repeated production downtimes at various paper and board mills, some as recently as the past few weeks. Accordingly, there was lower demand for ordinary recovered paper grades, while availability was sufficient and buyers were well-stocked with recovered paper.

Nevertheless, RCP paper supply was somewhat limited because of the export business and the low collection volumes, insiders say. Therefore, recovered paper prices declined only slightly in October, if at all. Several market participants from both sides of the market reported reductions of €5/t in October for mixed paper and board (1.02), supermarket paper and board (1.04) and old corrugated containers (OCC, 1.05). Depending on the starting level, prices also remained stable in some cases. For OCC in particular, peak prices were often eliminated.

So, despite subdued demand within Italy, there was no significant slide in prices. Several buyers said suppliers refused to grant larger mark-downs. Therewas a risk that material would be exported if the prices offered were too low, they added. Although the paper and board mills do not need a lot of fibre right now, they still have to purchase some volumes. A few market participants also said that overly large price cuts for recovered paper would send the wrong signal to customers in the market for corrugated

case material, as producers there are currently trying hard to maintain or possibly even raise their own sales prices.

Price adjustment in Far East export market, problems in China not yet affecting Italy

On the market for exports to Asia, prices in October also softened slightly in most cases. According to merchants, demand remained good, especially from India, and some players were using this alternative sales channel extensively. Yet, there was also scope for a price adjustment and buyers took advantage of the opening, EUWID was told. Consequently, most merchants granted mark-downs of up to €5/t, while prices also occasionally remained stable or nearly stable. In Italy, exports of OCC to Asia were fetching up to €110/t ex works in October, or still up to €115 in isolated cases.

On 10 October, China announced it had tightened the rules for imports of dry-processed recycled pulp and was carrying out controls. At the time of the EUWID market survey, it was still unclear how things would evolve and what consequences these developments might have for the global recovered paper market. One possible scenario is a decline in demand for recycled pulp and thus for recovered paper as well, leading to lower prices. However, most respondents in Italy were reluctant to speculate on what might happen. As of the last week of October, market participants had yet to see any local ripple effects, they said.

As long as there are no new surprises from the Far East market, November is likely to play out much like October, respondents say. Market experts do not expect any major demand drivers to emerge within Italy, but note that the export business was quite stable in late October. At that time, some orders for November deliveries had already been signed and merchants anticipated steady demand. However, quotes for OCC on the Far East export market could slip a bit further, some players believe. If that occurs, it might also prompt an adjustment for ordinary grades in Italy. Overall, market participants predicted either stable or slightly declining prices for next month.

Sluggish business with deinking grades

The weak demand in Italy was seen across all segments of the recovered paper market. Suppliers of deinking grades have been complaining for several months now that business has been sluggish. Buyers have significantly reduced their purchasing volumes in recent months, they say. Although supply is also low, price levels have edged slowly but steadily downwards.

October brought another round of smaller downward adjustments here and there. In these cases, market participants reported mark-downs of usually €5/t for magazines (1.06) and newspapers (2.01), but some prices also remained unchanged.

In some instances, prices of higher recovered paper grades had already started weakening in September after a long phase of price stability. This trend continued in October. Depending on the starting price, the timing and size of the cuts could vary. Some players were already implementing their second mark-down in October, while others had kept prices stable in September and now caught up with a downward step. For October, it appears that white woodfree letters (3.05) were marked down by as much as €10/t in many cases. Prices for white newsprint (3.14) and white woodfree shavings (3.18) often ticked €5/t lower, though there were also some unchanged quotes.

Suppliers have noticed a fall-off in demand in this segment recently. Over the course of the year, supply and demand had often been balanced because collection volumes for these grades are always low. Now, however, there is a contraction in demand from the tissue industry, too, say some waste management firms. The slump in consumer spending has also now reached the sanitary paper segment, some say, while others point to the still-low pulp prices and substitution effects.

Many prices on the Italian market continue to trend downward in October

Brown RCCM grades surprise with stable prices at previous month’s level

 29 October 2025 | ⌚ ~ 12 min | [Published in issue 44/2025](#)

After several months of falling prices, paper producers are seeing their margins come under severe pressure and are eager to see greater price stability. Market-related production cuts have so far done little to change the situation. Most markets remain oversupplied and, given the weak demand, buyers continue to hold the stronger position.

EUWID Price Watch Italy			
October 2025			
Prices in € per tonne free delivered unless otherwise stated	October 2025	September 2025	October 2024
Fine paper			
Woolfreen coated			
Copy paper 80 g A4 80 grade	900 - 970	900 - 980	1,020 - 1,100
Copy paper 80 g A4 C grade	780 - 870	790 - 890	940 - 1,020
Other news 80 g	900 - 930	900 - 970	1,010 - 1,100
Other news 80 g	780 - 870	790 - 890	920 - 1,020
Woolfreen coated			
News, double coated, 100 g	920 - 1,000	930 - 1,020	1,020 - 1,100
Recy, double coated, 100 g	840 - 910	840 - 920	930 - 1,020
Publication paper			
Newsprint uncoated 40 g	570 - 600	580 - 610	600 - 620
Newsprint uncoated 40 g	380 - 410	390 - 420	410 - 440
Improved newspaper 50-56, 12 g	400 - 420	410 - 430	430 - 450
UK, offset 60 g	720 - 760	730 - 770	750 - 800
UK, offset 60 g (A)	620 - 650	630 - 660	650 - 690
UK, offset 120 g (A)	650 - 680	660 - 670	680 - 700
Corrugated case material			
Primary fibre corrugated case material			
Unbleached kraftliner 170 g, European quality	610 - 660	640 - 670	650 - 690
White top kraftliner 180 g, European quality	780 - 830	790 - 840	800 - 850
Recycled corrugated case material			
Recycled Felling, European quality	330 - 370	330 - 370	360 - 400
Texlon S, European quality	390 - 430	390 - 430	420 - 440
Texlon S, European quality	360 - 380	360 - 380	400 - 420
White top kraftliner, grade C, 140 g, European quality	340 - 370	330 - 370	340 - 360
Markon, Italian quality	310 - 320	310 - 320	340 - 350
Texlon S, Italian quality	320 - 330	320 - 330	350 - 360
Cartonboard			
GD S	560 - 610	600 - 670	600 - 650
GD B	550 - 590	580 - 610	580 - 610
GD C	570 - 610	570 - 610	590 - 620
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The final quarter of the year has started with lower prices in many segments of the Italian market. While suppliers have tried in some cases to push back against buyers’ demands for price cuts, their success has generally been limited. Only brown recycled corrugated case material (RCCM) grades managed to hold prices at the previous month’s level. Paper producers are pleased about this, but converters are more divided. Although lower containerboard prices offer opportunities to reduce procurement costs, stable prices put corrugated manufacturers in a stronger negotiating position in price discussions with their own customers.

Fine paper prices continue to fall, but producers see emerging signs of slowdown

The Italian fine paper market remains characterised by weak demand and significant oversupply at the beginning of the fourth quarter. In this environment, price discussions have been anything but rare.

Following price reductions in the summer and at the end of

the third quarter, prices again moved downward in October, although the decrease at €10-20/t was smaller than in previous months. Overall, customers are now paying up to €50/t less than at the beginning of the third quarter.

EUWID Price Review Italy			
Third quarter 2025			
Prices in € per tonne free delivered unless otherwise stated	Third quarter 2025	Second quarter 2025	Third quarter 2024
Recycled paper (prices ex works)			
Mixed paper and board 1,100	85 - 110	90 - 140	90 - 110
Supermarket corrugated paper and board 1,140	90 - 110	90 - 170	90 - 130
Old corrugated container 1,180	90 - 120	90 - 150	90 - 140
New slapping of corrugated board (A01)	110 - 115	110 - 140	140 - 160
Magnetics 1,180	100 - 110	140 - 150	170 - 190
Newspapers 2,210	160 - 190	160 - 200	170 - 180
White woodfree news 1,100	710 - 720	720 - 730	720 - 740
White newspaper 1,140	200 - 215	210 - 215	230 - 250
White woodfree news 1,180	420 - 450	430 - 450	460 - 470
Fine paper			
Woolfreen coated			
Copy paper 80 g A4 80 grade	900 - 1,000	910 - 1,010	1,040 - 1,120
Copy paper 80 g A4 C grade	790 - 870	800 - 910	940 - 1,040
Other news 80 g	900 - 1,000	910 - 1,010	1,030 - 1,120
Other news 80 g	790 - 870	800 - 910	940 - 1,040
Woolfreen coated			
News, double coated, 100 g	910 - 1,010	920 - 1,030	1,040 - 1,120
Recy, double coated, 100 g	840 - 910	850 - 900	920 - 1,040
Publication paper			
Newsprint uncoated 40 g	580 - 610	590 - 620	600 - 620
Newsprint uncoated 40 g	390 - 420	400 - 430	410 - 440
Improved newspaper 50-56, 12 g	410 - 430	420 - 440	430 - 450
UK, offset 60 g	730 - 770	740 - 780	760 - 800
UK, offset 60 g (A)	630 - 660	640 - 670	650 - 690
UK, offset 120 g (A)	660 - 670	670 - 680	680 - 700
Corrugated case material			
Primary fibre corrugated case material			
Unbleached kraftliner 170 g, European quality	640 - 690	650 - 700	660 - 690
White top kraftliner 180 g, European quality	790 - 830	790 - 860	790 - 850
Recycled corrugated case material			
Recycled Felling, European quality	330 - 400	340 - 410	360 - 410
Texlon S, European quality	390 - 430	400 - 460	410 - 440
Texlon S, European quality	360 - 410	400 - 440	390 - 420
White top kraftliner, grade C, 140 g, European quality	310 - 340	320 - 360	330 - 360
Markon, Italian quality	310 - 340	340 - 370	340 - 350
Texlon S, Italian quality	320 - 330	330 - 360	340 - 360
Cartonboard			
GD S	600 - 670	620 - 690	620 - 710
GD B	580 - 610	580 - 610	590 - 620
GD C	610 - 630	610 - 630	630 - 650
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Some producers believe that the downward trend in fine paper prices could come to a temporary halt soon. First indications of this were already seen in negotiations for October deliveries. Several producers are said to have further cut production at some paper mills to reduce supply and strengthen their position with customers. Developments on the pulp market – with smaller price increases for September and October deliveries – are also expected to support producers in their efforts to stabilise prices. Higher variable costs, such as for raw materials, coupled with higher fixed costs due to weak capacity utilisation and production curtailments, are driving up the cost of each tonne of paper and leave no room for further price cuts, sources said.

Other EUWID contacts – including producers, merchants, traders and buyers – take a somewhat different view of the Italian market for woodfree coated and uncoated papers and do not believe in a near-term stabilisation. Prices, they say, remain under pressure. As long as producers cannot afford to turn down orders, it will be difficult to resist customers' demands for lower prices, one producer complained.

Some market participants speak of a price war among leading suppliers vying for customers and market share in Italy – a battle that is reportedly also being fought in other EU and non-EU markets.

In Italy, customers can choose between European and non-European suppliers for both uncoated and coated woodfree papers. This not only fuels competition but also undermines European producers' efforts to achieve a balanced market, several EUWID contacts reported. When a paper mill temporarily halts production to reduce output, it cannot count on improved market conditions once it restarts. On the contrary, every tonne that is withdrawn from the market can immediately be replaced by other paper mills' deliveries – often at a lower price, sources said.

Smaller price adjustments for publication papers in the fourth quarter

The trend in publication paper prices for deliveries from October had already become apparent in the previous month. Tentative attempts by some suppliers to raise prices for newsprint deliveries in the fourth quarter proved unsuccessful in Italy. Even efforts to maintain newsprint and magazine paper prices at third-quarter levels did not always meet with customers' acceptance. After some major buyers had already secured low prices for third-quarter deliveries back in June or July, others aimed to follow suit from October at the latest and entered fourth-quarter negotiations with demands for price reductions.

Given low capacity utilisation and unsatisfactory order intake at most paper mills, it did not take much to bring producers to the negotiating table and agree to price concessions. Although many mills are still struggling with high cost burdens, producers have reportedly taken advantage of slight relief in raw material and energy costs to lower their prices and secure one or two additional orders, sources said.

The existing competition among European producers of newsprint and SC papers is being further intensified in Italy by deliveries from Canada. In a price-sensitive market like Italy, the right price was the only way to win orders, one producer stressed. Under these circumstances, suppliers have responded to customer demands, in some cases more swiftly, in others more cautiously or to varying degrees, a publishing buyer explained.

Depending on supplier, customer and starting price, market participants report price reductions of €10-15/t for deliveries from October, and somewhat more for some magazine paper grades. As a result, selling prices on the Italian publication paper market are said to have fallen by around €30/t in the second half of the year. Unchanged prices for the fourth quarter were reported only where price levels had already been particularly low in the third quarter.

However, the price trend for publication papers in Italy cannot be explained solely by weak order volumes and the poor bargaining position of paper producers. It also reflects the difficult situation facing paper buyers, particularly commercial printers. They complain of inadequate margins and a surprisingly weak order situation at the beginning of the fourth quarter. Activity in the printing of retail flyers and leaflets has declined, and there are few alternative print projects to compensate for the losses, one printer reported. The large number of dissatisfied printing companies with low capacity utilisation is thus said to be fuelling competition in the sector. Those seeking extra orders have to win them from their competitors – and that can only be done on price. However, many companies are already operating in the red, another printer explained.

As is often the case after an unsuccessful round of price negotiations, paper producers are pointing to their difficult position and the risk of further capacity closures if prices continue to fall. Some producers believe that the machine closures already announced for the end of the year will lead to a noticeable reduction in supply of certain publication paper grades. Every further machine closure adds to the risk of destabilising market supply, one producer stressed.

While some publishing buyers may pause to reflect on such warnings, commercial printers generally remain unimpressed. Lower paper prices are one of the few ways to improve their cost base and margins – and neither commercial printers nor publishers can afford to give up this advantage, a market participant noted.

Downward price spiral stalls for brown RCCM, further reductions for kraftliner

In October, the downward price spiral for recycled corrugated case material more or less stalled. In most cases, EUWID respondents said they were doing deals at prices unchanged from the September level. Only white-top testliner prices slipped slightly lower again in October owing to aggressive behaviour by individual suppliers. However, the white paper grades had shed less value than the brown grades in the last few months, so many market participants described this price trim as a catch-up effect.

A few market participants believe the price stability for brown RCCM grades in October was due to the price-raising initiative undertaken by a handful of paper producers. These announcements had – at least temporarily – redirected the focus of the price talks towards rising rather than falling prices, they say. However, the majority of EUWID respondents do not agree that this initiative was particularly important, arguing it was only half-hearted and short-lived. Shortly thereafter, a few suppliers had surprised and unsettled the market by offering special prices on the spot market, explained one paper producer.

According to market insiders, the real reason for the price stability is more likely the difficult situation faced by paper mills: Depending on the site and capacity utilisation, the price-cost ratio means that some mills might already be producing every single tonne of paper at a considerable loss. Others might just be breaking even thanks to sales of unused CO₂ certificates and other measures, EUWID was told. As there was some uncertainty regarding the procurement and cost trends for raw materials and

energy, paper producers were said to be trying even harder to achieve price stability at the beginning of the fourth quarter.

Nevertheless, some buyers were surprised by the fact that prices for recycled fluting (Wellenstoff), testliner and other brown recycled corrugated case material grades remained mostly stable in October. This was all the more puzzling since paper mills continued to complain about weak order books and insufficient machine utilisation, they added. Because of the subdued demand, the excess supply on the European market for corrugated case material is even more pronounced, explained one buyer. A few participants therefore believe this stability will be only temporary and price cuts cannot be ruled out in the coming months.

The situation on the market for brown kraftliner developed in line with expectations in October. Imports of brown kraftliner from the USA and Brazil can be sourced inexpensively, not least due to the strong euro. And after US suppliers cut prices once again for October production, European suppliers also lowered their sales prices. Market participants in Italy reported markdowns of €10-15/t, or €20/t in rarer cases, for deliveries in October.

The low-priced offers of US and Brazilian suppliers were not the only factor putting pressure on prices of European kraftliner. The ongoing crises in the European automotive, chemical, furniture and engineering sectors, as well as their supplier industries, are also weighing heavily on demand. In addition, kraftliner consumption has eased following the end of the summer harvesting season.

The weak demand for packaging also impacts prices for white-top kraftliner, which likewise retreated in October. As in the brown kraftliner market, prices here were trimmed by €10-15/t.

Among the primary fibre-based corrugated case materials, semi-chemical fluting has shown the greatest stability in recent months. However, price cuts of as much as €20/t were also reported for deliveries in September or October. This product has a niche status thanks to the small number of suppliers (and to legal requirements for certain packaging in Italy), but the generally weak demand and significant price gap to recycled papers are increasingly noticeable in the consumption figures, according to one packaging producer.

Producers of corrugated board and packaging surveyed in recent weeks complain that autumn has got off to a weak start overall. The Christmas business has not brought much tailwind, at least not to the extent players had expected and hoped for. According to some packaging producers, a contributing factor here could be that major online sellers are expanding the use of paper mailing bags instead of corrugated packaging, or do not use secondary packaging for certain shipments at all. Other packaging producers are suffering alongside their major customers in the retail and industrial sectors and are feeling the full impact of weak consumer spending and sluggish industrial production.

The feeble demand also lays bare the capacity overhang in the corrugated board and packaging sectors, EUWID was told. The large-scale investments of recent years are now affecting the capacity utilisation and ultimately the price trend for corrugated sheets, said one market participant, talking to EUWID.

Buyers pay less for cartonboard in the fourth quarter

At the start of the fourth quarter, prices for recycled and primary fibre-based cartonboard developed as expected in Italy. The lower price levels had already been circulating during the summer and served as a negotiating basis and blueprint for some of the contracts signed for fourth-quarter deliveries.

Depending on the supplier, customer and starting price level, the reductions for recycled board typically ranged between €20-30/t. In combination with the price reductions at the beginning of the third quarter, quotes for GD board have thus fallen by around €40-50/t in Italy.

Prices of GC board were likewise reduced by €20-30/t at the start of the fourth quarter, according to insiders, so the cumulative decline since the start of the year is up to €50/t, or even more in certain cases. Although the figures in half-year contracts were unaffected by the fourth-quarter price cuts, market players expect corresponding downward adjustments in the upcoming year-end negotiations.

In the view of some market participants, the price adjustments in the contract business represent only as a small and specific segment of the overall market activity. Below the surface, i.e. on the spot market and in special deals, prices are not only more volatile, but also in many cases lower, according to players on the Italian market.

In the primary fibre-based board market, price talks on the Italian market are being influenced by competition from imports from Asia and South America, for example. In addition, new capacities in Europe as well as new strategies among suppliers are shaping the market.

For one thing, cartonboard producers themselves have reportedly taken a more active and aggressive stance and are increasingly trying to secure contracts via prices in order to improve their capacity utilisation. For another, established merchants and sheeters are looking for new partners as they attempt to safeguard their businesses against the new suppliers in the market and against the growing competition from traders. As a result of all this, it was still a buyer's market for GC board early in the fourth quarter.

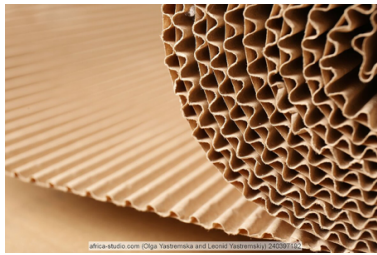
In the recycled board segment, the problem is not so much the growing presence of importers and trader but rather the structure of the market. Producers are struggling with an ongoing weak market, which is still oversupplied despite capacity closures and declining deliveries.

Given these developments, experts do not rule out further capacity closures in both the GC and GD board markets. It remains to be seen whether such moves would be sufficient to stop the current price erosion. Market-related stoppages are therefore repeatedly being discussed and partly also used as a means to temporarily reduce the excess supply.

The demand trend as well as the development of raw material and energy prices will be decisive for determining how future prices move in Italy. In terms of recovered paper, there are some uncertainties with regard to availability, but market participants generally expect stable to slightly declining prices. On the pulpwood market, there was some cost-side easing in Scandinavia over the past few months and pulpwood is still readily available. Nevertheless, wood prices are still high, cartonboard producers warn.

Corrugated board producer Bart nearing completion of major investment in Poland

 **EUWID** + 28 October 2025 | ⌚ ~ 1 min | Published in issue 44/2025



Bart is investing PLN250m in its corrugated board site in Świecie

Polish corrugated board and corrugated packaging manufacturer Bart is about to complete a multi-year investment programme at its Świecie site in northern Poland. The project is currently in its final phase and is expected to be completed by the end of the year, according to the company. In total, Bart is spending around PLN250m (around €58m) on expansion and modernisation of the plant.

The packaging manufacturer intends to leverage the investment to increase production capacities and efficiency. The first phase, amounting to PLN160m, included the expansion of the machinery pool and infrastructure. According to a company spokeswoman, a new corrugator was installed, which increased the company's corrugated board output by around 50 per cent to currently 280 million m². At weekly five-day operation, this corresponds to a converting volume of about 150,000 tpy of corrugated case material. In addition, systems for digital process monitoring and data acquisition have been installed.

For the current year, Bart expects output of around 215 million m² of corrugated board on the new line.

In the second phase, which is estimated at PLN90m and is running until the end of the year, the company will focus on further automation of production, expansion of intralogistics and the development of additional sales markets.

Bart was founded in 1992 and has grown from a pure packaging producer to a supplier of cut-sized corrugated sheets and packaging. The Polish family-owned company employs around 350 people and operates 18 production facilities. Bart says it delivers to 14 European countries and produces around 260 million corrugated cardboard packaging units annually. The company's annual sales amount to about PLN400m.

Essity announces cost savings and new organisation to support profitable growth

23 October 2025 | [Frauke Schmidt](#) | 🕒 ~ 1 min | [Published in issue 44/2025](#)

Hygiene and health company Essity has announced a new cost savings programme and organisational changes aimed at strengthening conditions for profitable growth.

The measures are expected to generate annual savings of approximately SEK1bn, with full effect by the end of 2026. The programme primarily targets sales and administrative expenses, while marketing (A&P) costs are not included.

Essity will also decentralise decision-making and strengthen end-to-end accountability within each product category.

According to the company, this will enhance customer and consumer focus and increase speed, agility and operational efficiency.

The new structure will take effect on 1 January 2026 and will be reflected in the company's financial reporting from the first-quarter 2026 interim report onward.

"Today we are launching measures to create better conditions for Essity to increase its growth rate going forward and to achieve our targets more quickly," said Ulrika Kolsrud, President and CEO of Essity.

Under the new organisation, Essity will operate four business areas (Health & Medical, Personal Care, Consumer Tissue and Professional Hygiene), each with overall responsibility for innovation, production, marketing and sales. The current Consumer Goods division will be split into Personal Care and Consumer Tissue. The company's global units for Marketing & Innovation and Supply Chain will be integrated into the four business areas.

The reorganisation is accompanied by management changes: Tuomas Yrjölä, currently President Global Marketing & Innovation, will become President Personal Care. Volker Zöller, President Consumer Goods EMEA, will assume the role of President Consumer Tissue. Anand Chandarana and Pablo Fuentes will take over as Presidents of Health & Medical and Professional Hygiene, respectively.



Ulrika Kolsrud, President and CEO of Essity

EU Commission proposes simplification measures but seeks no general delay to EUDR

 **EUWID** + 22 October 2025 | [Konstantin Stoll](#) | ⌚ ~ 3 min | [Published in issue 44/2025](#)

On 21 October, the EU Commission presented its proposal to simplify the EU Deforestation Regulation (EUDR) in order to reduce the obligations for operators and traders, especially for small and micro companies from low-risk countries and reduce the volume of data



reported into the IT system. The proposal also includes a transitional implementation period for EUDR but does go for a general one-year delay.

With a series of "targeted measures" the Commission wants to support affected companies, stakeholders, third countries and EU member states in the smooth implementation of the EUDR. However, the European Commission is not planning a blanket postponement of the EUDR. The "zero-risk category" previously called for by the European People's Party (EPP) Group in the European Parliament and the German government, among others, is also not part of the Commission's proposal.

One-year postponement to apply only to micro and small enterprises

The Commission is proposing transitional periods for the implementation of the EUDR in order to "guarantee a smooth transition" and "strengthen the IT system." In concrete terms, this means that the Deforestation Regulation will not come into force for micro and small enterprises until 30 December 2026. For large and medium-sized enterprises, 30 December 2025 will remain the relevant deadline. However, they will be granted a six-month transitional period for controls and enforcement of the EUDR. According to the Commission, this is to ensure the gradual introduction of the regulations.

Due diligence required only from first distributors

The simplifications proposed by the Commission mainly focus on companies and traders who commercialise the relevant EUDR products after they have been placed on the EU market as well as micro and small producers from low-risk countries worldwide who sell their goods directly on the European market. According to the Commission, the latter accounts for almost 100 per cent of agriculture and forestry in the European Union.

Among other things, the simplifications aim to ensure that only companies placing a product on the European market for the first time are required to submit a due diligence declaration. Downstream market participants and traders should no longer be obliged to submit a corresponding due diligence report. According to the Commission, this simplification would mean that "only one submission in the EUDR IT system at the entry point in the market will be required for the entire supply chain."

At the same time, micro and small primary operators would only submit a simple one-off declaration in the EUDR IT system. And if the information is already available in the database, the operators will not have to take any action in the IT system themselves, the Commission says.

Commission calls on EU Council and Parliament to take a timely decision

The Commission's proposal will now be reviewed by the European Parliament and the Council. The targeted amendment to the EU Deforestation Regulation will need formal adoption by the two bodies before entering into force.

The Commission is also working on contingency plans to ensure that economic operators can meet their obligations if this legislative proposal is not adopted by the two legislative bodies in time. In this case, the EU regulation will enter into force on 30 December 2025.

The Commission has presented a package that addresses the challenges of implementation of the EUDR, Commissioner Jessika Roswall said. The Commission's proposal simplifies the rules, particularly for small farmers and operators, while maintaining "a robust tracking mechanism" and ensuring Europe's global leadership in the fight against deforestation. It was not a question of lowering ambitions, but of making the rules better and smarter, she said.