

Boxboard Europe

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Top stories

April Packaging Focus: RCCM prices up, UKL, FBB, WLC prices start to rise

By Andrea Venturini - Thursday 30 April

RCCM prices increase further: Recycled containerboard (RCCM) prices rose further in Germany, France and Poland, reaching a total €100 (\$117) per tonne increase over March and April. In the UK and Italy, RCCM prices rose for the first time this year by £80 (\$108) per tonne and €60 per tonne respectively.

Prices remained stable in Spain because, according to market sources, price reductions in 2025 had been less significant than in other countries.

On the white side, uncoated white-top testliner prices rose by €40 per tonne in Germany, France, Poland and Italy, while they were carried over into the new month in the UK. The same was valid for Spain, where a €40 per tonne increase had been implemented as of March 20. According to market participants, European paper suppliers will try to implement a further €40 per tonne raise on RCCM in Italy to bring the total increase to €100 per tonne.

Kraftliner prices begin to rise: Unbleached kraftliner (UKL) prices started to increase in April in continental Europe, driven by rising input costs and a tighter market situation. According to market sources, such increases were not applied across the board, with some producers postponing implementation to May. As a consequence, UKL prices increased by up to €60 per tonne in Germany, France, Poland and Spain, while they remained flat in the UK and Italy.

According to market participants, American suppliers increased UKL prices for export to southern Europe by €30-50 per tonne for production in April and deliveries in late May and June and further increases are expected next month. White-top kraftliner prices also started to rise in April, with increases of up to €40 per tonne in Germany, France, Poland and Spain. Semi-chemical medium fluting prices increased by €50-60 per tonne in April in Spain, following a €60 per tonne increase for national semi-chemical fluting in March.

FBB prices start to rise: Folding boxboard (FBB) prices started to increase in April. While several buyers, mainly in the UK, told Fastmarkets early in the month that they rejected all price increases or were still in negotiations, others said they accepted paying around €30-40 (\$35-47) per tonne more than the previous month.

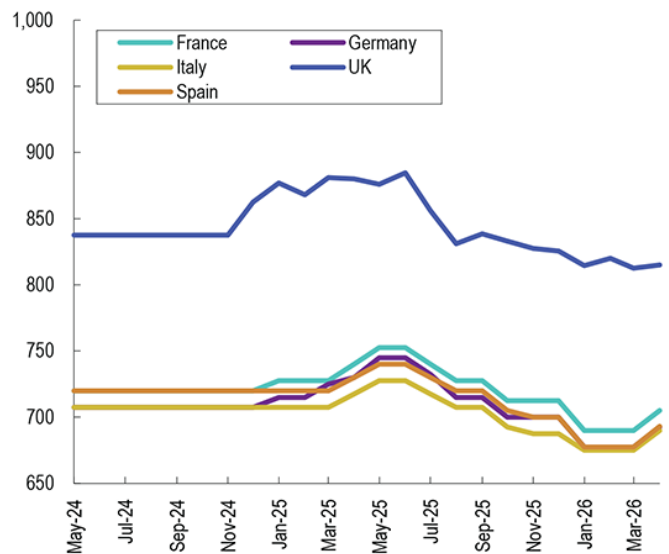
The reasons for accepting the increases varied. Some market insiders said customers expected further price increase announcements and were trying to secure volumes. Others said customers were attempting to replace orders placed with non-European suppliers with more readily available European volumes. "Many customers do not know when their orders will arrive and at what price. So it is safer to order from domestic suppliers," one of them said.

Some manufacturers said the April increases covered only a fraction of the cost increases they were facing for raw materials, energy and transport and did not rule out further price increases or surcharges from May.

WLC prices increase in April: Prices of white-lined chipboard (WLC) also started to rise in April. However, the increases fell short of the initially announced targets and reached an average of around €10-35 per tonne. Market insiders attributed this to the fact that a few suppliers announced increases only for new or May orders.

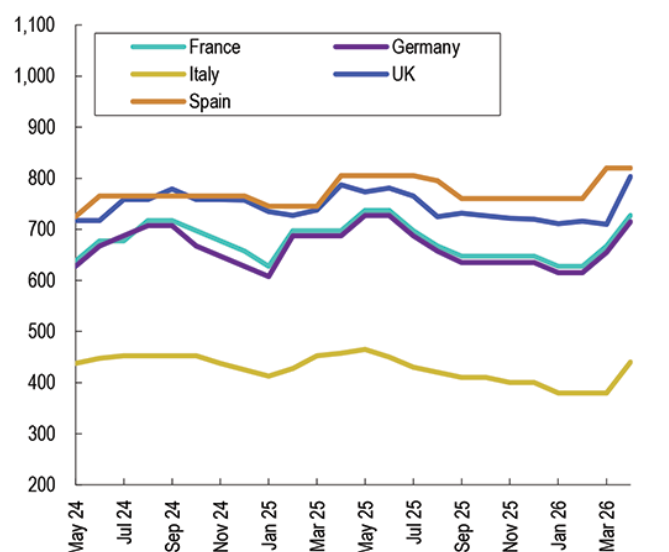
Moreover, they said WLC manufacturers were reluctant to implement higher increases than those realized on the FBB side. "If the gap between WLC and FBB prices gets too small, some customers might decide to switch from WLC to FBB, and that is a risk manufacturers do not necessarily want to take, especially if leading FBB suppliers are relatively late in revealing their price plans," a source told Fastmarkets.

Cartonboard - white-lined chipboard (GD2)
(Euro/tonne)



Source: Fastmarkets

Testliner 2 - 140 g
(Euro/tonne)



Source: Fastmarkets

**Related News Boxboard/Cartonboard Europe****SIG Q1 2026 results: adjusted EBITDA down 4% from year ago to Euro 159.8 million**

- Tuesday 28 April

Q1 2026 revenue at constant currency stable vs. Q1 2025 (constant currency and constant resin (0.2)%1)

- Q1 2026 reported revenue (4.2)% vs. Q1 2025
- Q1 2026 adjusted EBIT margin 13.4% up from 12.8% in Q1 2025
- Full year guidance maintained
- Capital Markets Day planned for October 27, 2026

Mikko Keto, CEO, said: "Despite a difficult market environment, we are pleased to report a solid start to the year, characterized by stable revenue performance and an improvement in our adjusted EBIT margin. While the first quarter reflected only a limited impact from higher raw material costs, we have initiated pricing actions to mitigate cost effects and maintain our full year guidance.

The restructuring program announced last year is progressing as planned and is ramping up during the first half of 2026. We will continue to rigorously review our cost base to further enhance efficiency. Strategically, our focus remains firmly centered on aseptic system solutions.

SIG is very well positioned to benefit from secular growth trends, strong customer relationships and a well-balanced regional footprint."

¹ The resin escalator for the bag-in-box and spouted pouch businesses, which passes on movements in resin costs directly to customers, is excluded for year-on-year comparison purposes.

[For the full report and financial tables, [click here.](#)]

Stora Enso launches new unbleached product Trayforma Brown, reducing basis weight across its Trayforma range

- Wednesday 29 April

Stora Enso is introducing two significant developments to its Trayforma tray board range: a basis weight reduction across the existing range, and the launch of Trayforma Brown, an entirely new unbleached product.

Together, they extend what Trayforma offers by delivering greater material efficiency and adding a new option for brands seeking a natural look on shelf.

The new lighter Trayforma delivers the same strength, forming performance, and converting reliability as the current base board, but uses less raw material. Less material per tray means better yield throughout the value chain, and a lower board weight naturally contributes to reduced carbon footprint in production and transport.

Trayforma Brown responds to demand for a premium natural appearance in tray packaging. Its technical performance meets the same demands as the rest of the Trayforma family, and it is the first brown tray board to support oven heating, withstanding temperatures up to 220°C with a transparent PET coating. It is also available with a high-barrier BarrPeel solution for vacuum-skin packaging.

"For our customers, the natural look of brown board is increasingly relevant, but not at the cost of performance. With Trayforma Brown, they don't have to make that trade-off. And with our advancements in lightweighting Trayforma, everyone in the value chain benefits from better yield," says Jaana Tani, Technical Account Manager, Trayforma.

Both products are built on a three-ply structure incorporating CTMP in the middle layer, which enables reduced basis weight while maintaining board thickness. Trayforma Brown is well-suited for ready meals, bakery, and chilled and frozen food.

Trayforma Brown and the lightweighted Trayforma range will be presented at Interpack 2026 in Düsseldorf, Germany, 7-13 May.

Stora Enso is a global leader in renewable materials with a strong focus on packaging. Our purpose is to replace non-renewable materials with renewable solutions. Together with our customers, we design and deliver competitive, high-quality packaging materials and solutions, made from fresh and recycled fibers, accelerating the transition to a circular bioeconomy. Stora Enso has approximately 19,000 employees and our sales in 2025 were EUR 9.3 billion.

Duni Group launches Sealable Ronda, sealable paper bowl for ready-to-eat meals

- Tuesday 28 April

Duni Group launches Sealable Ronda, a sealable paper bowl for salads and bowl meals, developed within the Duniiform brand. By combining paper with hermetic sealing and modified atmosphere packaging (MAP), the solution enables longer freshness for ready-to-eat meals, reduced food waste and secure handling throughout the distribution chain, while reducing the relative use of plastic.

Demand for ready-made salads and bowl meals continues to grow, while food waste remains one of the main sustainability challenges within the ready-meal segment. At the same time, food producers and retailers face increasing demand for packaging solutions that can extend shelf life, perform safely in logistics and retail environments, and respond to the need for alternatives with lower plastic content. Sealable Ronda has been developed to meet these requirements by enabling hermetic sealing and modified atmosphere packaging (MAP) in a paper-based format, supporting additional days on the shelf and reducing the risk of food being discarded. Compared with plastic-based Duni bowls of a similar size, the solution features more than 85 per cent lower plastic content and more than 50 per cent lower CO₂ emissions*.

The sealing provides a leak-resistant, tamper-evident and hygienic package that protects the meal throughout the distribution chain. It reduces the risk of leakage, supports safer transport, and enables cleaner handling in both logistics and retail environments. The visible seal also makes it easy for consumers to see that the package has not been opened. At the same time, the solution responds to a clear market demand: the ability to seal paper bowls and thereby combine a high share of renewable material with functionality that has long been standard in plastic packaging.

"Reducing food waste is one of the most effective ways to lower the climate impact of food. With Sealable Ronda, we enable our customers to keep ready-to-eat meals fresh for longer, while offering a secure, sealed solution in paper. This strengthens both food safety and confidence throughout the value chain" says Marie Davies, Category Manager Trays and Films at Duni Group.

The round bowl format is adapted for modern food concepts such as salads, bowls, sushi and poke bowls and provides a clear and appetising presentation on the retail shelf. The format is easy to stack and handle in store and is suitable for both hot and cold dishes. Sealable Ronda is made from FSC-



certified and other controlled material and can be printed, enabling producers to communicate content, origin and brand directly on the packaging.

Duni Group, via its brand Duniform, offers Sealable Ronda as part of a complete system of compatible packaging, films, machines and services. The solution is developed to improve logistics, reduce downtime in production, and create better conditions for a structured approach to reducing both food waste and resource use.

The launch aligns with Duni Group's ambition to contribute to future sustainable and inspiring food experiences through solutions that strengthen food safety, extend shelf life, and help reduce food waste throughout the value chain.

About Duniform

Duniform is a complete packaging concept from Duni Group, designed for the food industry, professional kitchens, restaurants, catering, hotels and grocery retail. With a focus on simplicity, scalability and sustainability, Duniform offers sealing machines, trays, films, service and expert advice. Through innovative design and more sustainable material choices, Duniform helps businesses improve operational efficiency and reduce food waste by extending shelf life. Duniform is part of Duni Group's business area Food Packaging Solutions. Duni Group is represented in more than 50 markets worldwide.

Sun Chemical to reveal inks, coatings, primers and adhesives with strategic consulting and technology capabilities at interpack 2026

- Tuesday 28 April

Sun Chemical will reveal its expanded value proposition at interpack 2026, aligning its latest innovations in high performance inks, coatings, primers and adhesives with strategic consulting and technology capabilities. This showcase will demonstrate how customers can transform packaging challenges into real commercial opportunities.

"interpack 2026 marks the beginning of an important new chapter in our evolution, from trusted materials provider to complete solutions and services partner," said Mehran Yazdani, President, Global Packaging and Specialties. "Real advancement requires the latest innovations, and a strategic partner who can provide extensive expertise coupled with geographical reach and continuous investment. Close collaboration with our customers continues to be a key driver for all our teams at Sun Chemical, and we look forward to welcoming visitors to our stand at interpack to discuss how we can help them transform."

Strategic insight

At interpack 2026, Sun Chemical's on-stand Insight Lab will offer expert-led seminars and tailored, one-to-one guidance to help delegates make packaging decisions for today and tomorrow. Sessions will explore packaging future scenarios, legislation and data requirements, brand design, and color management—designed to spark interaction and practical takeaways.

Aura, a leading global packaging consultancy and part of the Sun Chemical group, will join the team at interpack 2026. Aura provides expert advice and services across the packaging landscape to help solve problems, improve performance, and achieve their goals. The services they provide include branding, consultancy, technology and market insights.

Innovative Materials Solutions

Material solutions to be showcased at the event will include Nitrocellulose-Alternative (NC-alternative) inks, primers and adhesives; direct food contact inks and coatings; and a range of German Ink Ordinance (GIO)-compliant solutions. These innovations sit within the business's hero solutions range, designed to help packaging producers meet performance, sustainability, and compliance needs.

Highlights for customers across the wide markets Sun Chemical serve:

- With a strong focus on sustainability and compliance, the range of NC alternatives for both flexo and gravure printing processes will be featured. From lamination and surface to a range of versatile applications, these products ensure seamless system transfer without compromising performance. The range encompasses Solvacycle, SoliCycle, Duratort, Duralam and DuraCycle ink series.
- Sun Chemical is delighted to be the first company globally to offer a RecyClass-certified NC-alternative system, combining approved inks with compatible lamination adhesives, including SunUno SoliCycle inks, and SunLam lamination adhesives with a range of ULM ultra-low-monomer products.
- For brand owners looking to increase renewable content and reduce carbon footprint without compromising print performance and quality, Sun Chemical offers SunVisto AquaGreen. Suitable for a range of paper packaging applications, the latest generation incorporates significantly higher bio-renewable raw material content than previous versions.
- GIO-compliant and low migration solutions on display include SolarFlex FSP and SolarWave FSP, UV flexo inks tailored to deliver exceptional results on a diverse range of substrates. These will be showcased alongside GIO-compliant SunCure FLME inks for carton packaging, complemented by compliant SunCure UV coatings and SolarFlex high lustre metallics.
- Featuring vibrant colors and unparalleled efficiency, SunCure FLM and SunWave FSP UV offset inks and coatings will also be featured. Suitable for sensitive flexible packaging in segments such as food and tobacco, they incorporate rapid-cure technology and an expansive colour gamut.
- SunPak DFC inPace inks deliver the latest direct food contact technology for the sheetfed market, while AquaSafe offers a water-based flexo ink solution for DFC applications. Both are fully compliant with EU food safety standards.
- Sun Chemical's retentive, deinkable, and washable technologies help increase recycling rates while maintaining pack integrity throughout its lifecycle. SolarWave Integra inks are retentive, SolvaWash are retentive and washable inks, and SolarFlex CRCL like other Sun Chemical offerings is designed for deinking without a primer, helping to balance circularity with performance in flexible packaging markets.
- When it comes to digital print applications, the SunJet solutions offer an extensive ink portfolio for different technology platforms, and SunEvo provides efficient coating solutions for digital printing, including primers, varnishes, adhesion promoters and adhesives – supporting performance, durability, and seamless integration into existing workflows.

Join Sun Chemical at interpack 2026, Hall 7A, and 'Experience. Transformation.'

About Sun Chemical

Sun Chemical, a member of the DIC Group, is a leading producer of packaging and graphic solutions, color and display technologies, functional products, electronic materials, and products for the automotive and healthcare industries. Together with DIC, Sun Chemical is continuously working to promote and develop sustainable solutions to exceed customer expectations and better the world around us. With combined annual sales of more than \$8.5 billion and 22,000+ employees worldwide, the DIC Group companies support a diverse collection of global customers.

Sun Chemical Corporation is a subsidiary of Sun Chemical Group Coöperatief U.A., the Netherlands, and is headquartered in Parsippany, New Jersey, U.S.A.

Boxboard/Cartonboard Europe Key Attributes

Symbol	Description	Date	Price	+/-	Month	Monthly Average
FP-CBB-0098	Cartonboard/boxboard, folding boxboard (GC2) 270-280 g, free delivered France, €/tonne	01 Apr 2026	980 - 1190	15 (1.40%)	Apr 2026	980 - 1190
FP-CBB-0100	Cartonboard/boxboard, folding boxboard (GC2) 270-280 g free delivered Germany €/tonne	01 Apr 2026	980 - 1180	15 (1.41%)	Apr 2026	980 - 1180
FP-CBB-0099	Cartonboard/boxboard, white-lined chipboard (GD2) 300 g, free delivered France, €/tonne	01 Apr 2026	700 - 710	15 (2.17%)	Apr 2026	700 - 710
FP-CBB-0101	Cartonboard/boxboard, white-lined chipboard (GD2) 300 g, free delivered Germany, €/tonne	01 Apr 2026	680 - 705	15 (2.21%)	Apr 2026	680 - 705

Boxboard/Cartonboard Germany Markets

Symbol	Description	Date	Price	+/-	Month	Monthly Average
FP-CBB-0100	Cartonboard/boxboard, folding boxboard (GC2) 270-280 g free delivered Germany €/tonne	01 Apr 2026	980 - 1180	15 (1.41%)	Apr 2026	980 - 1180
FP-CBB-0101	Cartonboard/boxboard, white-lined chipboard (GD2) 300 g, free delivered Germany, €/tonne	01 Apr 2026	680 - 705	15 (2.21%)	Apr 2026	680 - 705

Boxboard/Cartonboard Spain Markets

Symbol	Description	Date	Price	+/-	Month	Monthly Average
FP-CBB-0104	Cartonboard/boxboard, folding boxboard (GC2) 270-280 g, free delivered Spain, €/tonne	01 Apr 2026	970 - 1190	15 (1.41%)	Apr 2026	970 - 1190
FP-CBB-0105	Cartonboard/boxboard, white-lined chipboard (GD2) 300 g, free delivered Spain, €/tonne	01 Apr 2026	680 - 705	15 (2.21%)	Apr 2026	680 - 705

Boxboard/Cartonboard France Markets

Symbol	Description	Date	Price	+/-	Month	Monthly Average
FP-CBB-0098	Cartonboard/boxboard, folding boxboard (GC2) 270-280 g, free delivered France, €/tonne	01 Apr 2026	980 - 1190	15 (1.40%)	Apr 2026	980 - 1190
FP-CBB-0099	Cartonboard/boxboard, white-lined chipboard (GD2) 300 g, free delivered France, €/tonne	01 Apr 2026	700 - 710	15 (2.17%)	Apr 2026	700 - 710

Boxboard/Cartonboard Italy Markets

Symbol	Description	Date	Price	+/-	Month	Monthly Average
FP-CBB-0102	Cartonboard/boxboard, folding boxboard (GC2) 270-280 g, free delivered Italy, €/tonne	01 Apr 2026	980 - 1190	15 (1.40%)	Apr 2026	980 - 1190
FP-CBB-0103	Cartonboard/boxboard, white-lined chipboard (GD2) 300 g, free delivered Italy, €/tonne	01 Apr 2026	680 - 700	15 (2.22%)	Apr 2026	680 - 700

Boxboard/Cartonboard UK Markets

Symbol	Description	Date	Price	+/-	Month	Monthly Average
FP-CBB-0094	Cartonboard/boxboard, folding boxboard (GC2) 270-280 g, free delivered United Kingdom, £/tonne	01 Apr 2026	960 - 1145	0 (0.00%)	Apr 2026	960 - 1145

Symbol	Description	Date	Price	+/-	Month	Monthly Average
FP-CBB-0095	Cartonboard/boxboard, folding boxboard (GC2) 270-280 g, free delivered United Kingdom, €/tonne	01 Apr 2026	1102 - 1314	3.5 (0.29%)	Apr 2026	1102 - 1314
FP-CBB-0096	Cartonboard/boxboard, white-lined chipboard (GD2) 300 g, free delivered United Kingdom, £/tonne	01 Apr 2026	685 - 735	0 (0.00%)	Apr 2026	685 - 735
FP-CBB-0097	Cartonboard/boxboard, white-lined chipboard (GD2) 300 g, free delivered United Kingdom, €/tonne	01 Apr 2026	786 - 844	2.5 (0.31%)	Apr 2026	786 - 844