

Boxboard Europe

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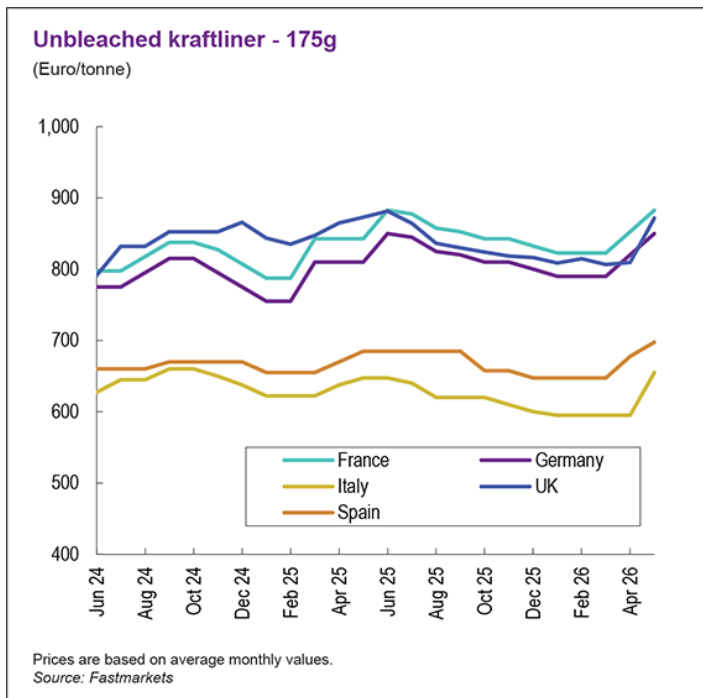
Packaging Focus May: Containerboard prices rise again, cartonboard prices stabilize at April levels

By Andrea Venturini - Thursday 28 May

RCCM prices up in Italy: Brown recycled containerboard (RCCM) prices increased by a further €20 (\$23) per tonne in Italy in May, reaching a total €80-per-tonne price increase over two months. According to market sources, prices for Italian quality testliner 4 and Italian fluting were partly stable and partly rising by €10-20 per tonne.

During the month, a number of paper producers reportedly tried to increase brown RCCM prices in Poland, where paper demand is stronger, by €50 per tonne, but the attempt was pushed back by buyers. Uncoated white-top testliner prices rose by £35 (\$47) per tonne in the UK and by €10-20 per tonne in Italy. In the rest of Europe, some market sources mentioned increases of up to €20 per tonne, but most market participants reported stable prices. At the end of May, Saica announced its intention to increase RCCM prices by €60 per tonne as of June.

Kraftliner prices grow: During May, European unbleached kraftliner (UKL) completed the price increase they started to implement in April by reaching a total increase of €60 per tonne in Germany, France and Poland and of €40-60 per tonne in Spain. Price increases were also implemented in the UK and Italy in May, where prices increased by £50 and €60 per tonne respectively. Similarly, white-top kraftliner prices grew by €40 per tonne over two months in Germany, France and Poland by £35 in the UK and by €30-40 per tonne in Italy.



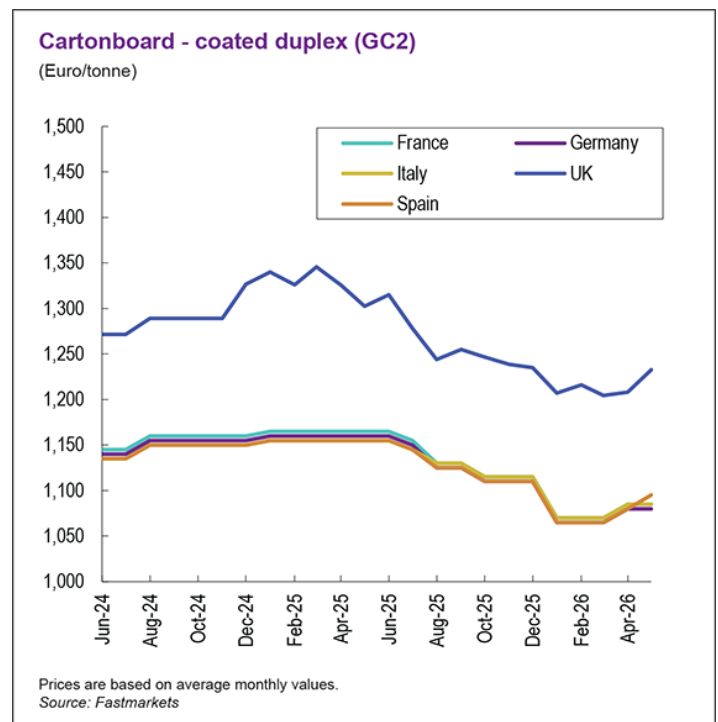
Semi-chemical fluting prices rose by €40 per tonne in central Europe and by €30-40 per tonne in Italy. In Spain, WTK and semi-chemical fluting prices

remained stable in May, after having increased in April.

According to market sources, at least three European suppliers expressed their intention to increase UKL and WTK prices by €80 per tonne from either June 1 or June 16.

FBB prices stabilize at April levels: Folding boxboard (FBB) prices, which started to increase in April, stabilized at the previous month's levels in May. Buyers in continental Europe had generally agreed to pay around €30-40 (\$35-47) per tonne more in April and confirmed the increases in May. In the UK, several buyers told Fastmarkets that they had rejected all price increase announcements so far. But most of them said they were up for fresh negotiations and it was very probable that they would have to pay higher prices or surcharges from mid-May or, at the latest, June.

Apart from that, May was a comparatively quiet month on the FBB side. Sources on the supply side generally told Fastmarkets that order intake was still quite good, but weaker than in April when customers had been trying to secure volumes as they expected more price increase announcements going forward or were trying to replace orders from non-European suppliers with more readily available European volumes. "There were a lot of public holidays and bridging days in May. I think everybody is starting to focus on negotiations for the third quarter or second half of the year now," a market insider said.



WLC prices level out: Prices of white-lined chipboard (WLC) also started to stabilize in May. Following average increases of around €10-35 per tonne in April, suppliers who had spread the announced mark-ups over April and May or only announced increases from May managed to raise prices by a total of €30-35 per tonne, and buyers who had so far rejected the announced rises said they agreed to pay around €30 per tonne from the beginning of June.

Several WLC suppliers reiterated that they would have needed higher increases to cover rising costs. The overcapacity in Europe did not allow them to implement higher mark-ups, however. Moreover, they were facing very competitively priced FBB offers from Asian suppliers who were trying to make WLC customers – where possible – switch from WLC to FBB.

**Related News Boxboard/Cartonboard Europe****Valmet's hard nip sizing technology boosts strength properties in customer's board machine in Europe**

- Monday 25 May

Valmet has been selected to supply a hard nip sizer with supply system and related services to a customer in Europe. The investment enables the customer to advance their regenerative journey by optimizing raw material usage and enhancing quality.

The target is to reduce starch and fiber consumption without compromising end-product strength properties. The start-up is scheduled for spring of 2027.

"Hard nip sizing technology offers a robust solution for modern board machines, combining superior strength development of the board with significant starch savings. This hard nip sizing technology supports the production of lighter-weight grades, aligning with industry trends toward resource efficiency and sustainability. We look forward to continuing our close cooperation with the customer in the future," says Klaus Kiviniemi, Product Sales Manager, Sizers and Coaters, Packaging and Paper, Valmet.

Unlike traditional sizing technologies, hard nip sizer applies starch on hard rolls with spray nozzles and presses the starch through the web at very high pressure. This technology ensures the strength properties of the board while enabling a reduction in starch consumption. The delivery also includes a supply system as well as spare parts and consumables packages. Valmet is committed to transforming its customer industries towards a regenerative tomorrow, and supporting efficient raw material usage with advanced technologies and services is one concrete example of this work.

The order was included in Valmet's orders received for the first quarter of 2026. The value of the order will not be disclosed.

Elopak's D-PAK cartons back OHPC to revamp Klar brand for Nordic markets

- Friday 29 May

Orkla Home & Personal Care (OHPC) has taken its Klar brand to the Nordics, launching several laundry products through retailer Normal filled in D-PAK cartons.

Launched in March 2026, OHPC has given its Nordic soap and detergent brand, Klar, a complete redesign across six new products for the discount retail chain.

The retailer opened in 2013, selling everyday 'Normal' home and personal care products at fixed low prices, including leading global brands, plus hard-to-get imported products for consumers living away from home.

First D-PAK carton in Danish market

The revamped Klar laundry care products are distributed across stores in Norway, Denmark, Finland and Sweden. For the Danish market, this is both the first Klar branded products available and, notably for Elopak, the country's first-ever D-PAK carton.

"The D-PAK carton format provides retailers with a shelf-ready product with eye-catching stand out," adds Ida Marie Grimsrud from Orkla Home and Personal Care. "The 360-degree carton surface gives us the unrivalled

packaging communication space to help this rebranding of our famous Nordic Klar brand make a splash in both well-established and new markets."

New D-PAK line meets consumer and regulation remits

Klar products were first launched in 2017 as refills in D-PAK cartons by OHPC in the brand's native Norway. Since the producer has switched to a new line of D-PAK cartons that contain a completely new, unique mix of circular (recycled) polyethylene and bio-circular (renewable) polymers.

The new line is now standard across all D-PAK cartons for OHPC products, including many iconic brands such as OMO, Comfort, Grumme, and Lumme. The latest launch brings new varieties to the Klar brand, featuring three laundry detergents and three fabric softeners, available exclusively in all Normal's stores throughout the Nordic region.

Duni Group supports sustainability efforts with plastic-free and compostable serving solutions at Vätternrundan recreational cycling event

- Wednesday 27 May

Vätternrundan, the world's largest recreational cycling event, has entered into a collaboration with Duni Group to take further steps toward its sustainability goals. Duni Group also becomes part of the network of partners contributing to Vätternrundan's sustainability work.

During this year's event, participants will be served beverages in fully plastic-free paper cups, while a composting solution will be tested at the Jönköping depot to manage food and packaging waste on site.

Vätternrundan attracts tens of thousands of cyclists each year around Lake Vättern. During Cycling Week, June 5-13, sustainability efforts are strengthened through concrete solutions from Duni Group, with a focus on reducing plastic use and enabling more circular handling of both food and packaging waste.

During the event, Duni Group supplies approximately 125,000 fully plastic-free paper cups, designed for high volumes and fast-paced environments. The cups contain neither plastic nor bioplastics, making it possible to completely avoid plastic even in serving contexts at large-scale events.

At the Jönköping depot, where around 12,000 meals are served, Duni Group also provides compostable packaging, as well as a composting machine from Duniform. The packaging is designed for local composting and enables both food and packaging waste to be handled in a unified flow on site. The material can then be transformed into nutrient-rich soil within approximately 24 hours.

"Vätternrundan has for a long time worked systematically to reduce its environmental impact. Transport and materials are two of our largest impact areas, and we are working purposefully to reduce that impact – both within our own events and by driving development in the industry. The collaboration with Duni Group is a concrete example of how we can combine large participant flows with more sustainable solutions in practice," says Oskar Sundblad, CEO of Vätternrundan.

For Duni Group, the collaboration is a further step in developing and scaling solutions that perform in large-scale event environments.

"Large recreational events place high demands on functionality, logistics and sustainability. Through our collaboration with Vätternrundan, we can



demonstrate how plastic-free single-use products and circular waste solutions can work even in complex and time-critical settings," says Nicklas Lauwell, Chief Officer, Business Area Food Packaging Solutions at Duni Group.

Vätternrundan and Duni Group share the ambition to develop more sustainable and resource-efficient solutions for large sports and recreational events. The collaboration, initially spanning three years, creates opportunities for long-term development, testing, and scaling of sustainable solutions. By supporting Vätternrundan's sustainability efforts with plastic-free and compostable serving solutions, Duni Group helps demonstrate how large-scale events can take concrete steps toward reduced environmental impact – with the ambition to inspire more players within the industry.

About Vätternrundan

Vätternrundan is part of the Swedish national identity and the world's largest recreational cycling event. The race has been organised since 1966 by the non-profit association Motala AIF and attracts tens of thousands of cyclists from Sweden and internationally each year.

Vätternrundan is part of Cykelveckan (Cycling Week), which takes place June 5–13, 2026, and includes several races: Vätternrundan 315 km, Halvvättern 150 km, Tjejvättern 100 km, Vätternrundan 100 km, MTB Vättern and Minivättern. In September 2026, Vätternrundan will launch a new race, Vätternrundan Gravel.

With start and finish in Motala, the event is one of Sweden's largest recurring sporting events. Vätternrundan has long worked systematically with sustainability issues and in 2013 became the first sporting event in Sweden to be certified according to ISO 20121 – an international standard for sustainable event management. The work continues with clear ambitions to reduce the event's environmental and climate impact.

Saica welcomes Spanish Ambassador at its recycled paper mill in Manchester

- Wednesday 27 May

Susana Alejandro, Saica's CEO welcomed Ambassador Emma Aparici to the company's Manchester site, home to the PM11 paper machine and a flagship example of circular economy manufacturing in the UK

Saica Group, one of Europe's leading manufacturers of recycled paper, corrugated board and flexible packaging, as well as a provider of comprehensive waste management and environmental services, welcomed the Spanish Ambassador to the United Kingdom, Emma Aparici, to its paper mill near Manchester on 26 May.

The visit highlighted Saica's long-term commitment to the UK, where the Group has maintained a strong industrial and commercial presence for almost two decades, supporting local employment, manufacturing and the transition to a circular economy.

Ms Aparici, who took up her role as Spain's Ambassador to the UK earlier this year, is undertaking a series of visits to leading Spanish companies operating within the UK. Her visit to Saica is part of this programme and reflects the importance of Spanish investment in the UK's industrial base.

During the visit, the Ambassador was accompanied by the Consul General of Spain in Manchester, Alejandro Polanco Mata. They were welcomed by senior members of the Saica team including, Susana Alejandro, Chairman and Chief Executive Officer, Pilar Franca, Sustainable Development & People Global Director, and Darren Johnston, Saica Paper UK Plant Manager. Together, they discussed Saica's operations in the UK, the company's journey, and its role in advancing sustainable manufacturing in the country.

The Ambassador also had the opportunity to witness first-hand the paper production process, gaining insight into how recovered, sustainable paper

and cardboard is transformed into high-quality recycled paper for packaging applications, whilst efficiently reusing water and energy.

During the visit, Ambassador Aparici highlighted the importance of companies like Saica in strengthening the ties between the UK and Spain: "Spanish companies like Saica are key to bolstering the economic relationship between our two nations. Saica's long-standing presence, continued investment and commitment to sustainability are a strong example of how Spanish industry contributes positively to local communities and to the UK's green transition."

Saica first arrived in the UK in 2006 with the acquisition of two containerboard packaging plants. Building on this momentum, in 2008, we further strengthened our presence by purchasing several additional containerboard packaging plants in the UK. This expansion set the stage for an exciting new project: the construction of a state-of-the-art paper mill. By 2012, our efforts culminated in the opening of the new Saica Paper mill in Partington, United Kingdom.

Since then, Saica has built an integrated nationwide footprint which includes recycled paper production, corrugated and flexible packaging and waste management. In addition to its flagship paper mill in Partington, the company operates also another 17 plants in the UK. Together, Saica's UK operations employ more than 2,000 people and form a strategically important manufacturing and recycling platform within the Group's circular economy model.

According to Susana Alejandro, Saica CEO: "The UK is a key market for Saica, and we remain firmly committed to continuing our investment and growth here. Welcoming the Spanish Ambassador to our Manchester site is an important opportunity to showcase the scale of our operations, the talent of our UK teams, and the role we play in supporting a more sustainable industrial future."

Sustainability and the circular economy sit at the core of Saica's business strategy. The Manchester paper mill, home to Paper Machine 11 (PM11), is one of the most advanced recycled paper mills in Europe. The site produces 100% recycled paper for corrugated packaging, using recovered paper sourced largely from within the UK.

PM11 was designed to minimise environmental impact, with advanced technologies that significantly reduce water and energy consumption compared with traditional paper mills.

During the visit, Ambassador Emma Aparici witnessed how PM11 plays a central role in Saica's circular economy model, helping to keep valuable materials in use, reduce landfill, and support a more resilient and sustainable packaging supply chain in the UK.

Metsä Board receives SBTi validation for its updated near-term emission reduction targets

- Tuesday 26 May

Metsä Board, a leading European producer of fresh fibre paperboards and part of Metsä Group, has received validation from the Science Based Targets initiative (SBTi) for its updated near-term emissions reduction targets.

Metsä Board has had SBTi validated targets in place since 2019.

With the update, Metsä Board extends its climate targets beyond its own production to address greenhouse gas emissions across the value chain. This reflects a shift from focusing solely on operational emissions to managing climate impacts throughout the lifecycle of its products.

As part of this expanded approach, Metsä Board has introduced a new Scope 3 target covering emissions from the end-of-life treatment of sold products,

committing to reduce these emissions by 25% by 2030 from the 2024 baseline.

In addition, the company commits that 47% of its suppliers by spend – covering purchased goods and services, capital goods and upstream transportation and distribution – will have science-based targets by 2030, further strengthening climate action across the value chain.

The updated Scope 1 and 2 target reflects a broader accounting of all greenhouse gases and does not change Metsä Board’s earlier ambition to phase out fossil energy in production by 2030.

“Metsä Board has already reduced its emissions significantly and today operates with 93% fossil-free energy in its production. By extending our targets to cover end-of-life emissions of our paperboards, we are supporting our customers in reducing packaging-related climate impact, for example through our recyclable materials and packaging design collaboration,” says Esa Kaikkonen, CEO of Metsä Board.

Holmen expands lightweight containerboard range with fresh-fibre fluting

- Tuesday 26 May

To meet growing demand for lightweight and resource-efficient corrugated packaging, Holmen is extending the Holmen Elevate range with a fresh-fibre fluting – Holmen Elevate Flute. The addition enables a consistent approach across the entire corrugated structure, reducing material use and emissions without compromising performance.

Holmen Elevate is a range of ultra-lightweight containerboard designed for consistent performance in corrugated packaging. With the addition of fresh-fibre fluting, the range now includes both liner and fluting. This enables a unified approach to lightweighting, with grades starting at 72 gsm.

The range is used in applications such as e-commerce, shelf-ready retail, and fruit and vegetable punnets, where reducing weight, cost and material use is increasingly important. Approved for direct contact with dry, moist, and fatty foods, it supports food and beverage packaging without compromising quality.

“Fresh fibre is at the core of how we combine performance with sustainability,” says Mathias Dufeld, Segment Owner Containerboard at Holmen Board and Paper. “By enabling lightweight corrugated solutions, we can help reduce material use and improve cost efficiency while supporting circularity and the efficient use of resources.”

Holmen Elevate is manufactured at Braviken Paper Mill in Sweden and delivers one of the lowest carbon footprints in the sector. Production is based on an integrated, resource-efficient supply chain where pulpwood and wood chips are sourced from Holmen’s adjacent sawmill and residual materials are used for bioenergy or soil improvement.

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 May 2026	980 - 1190	0 (0.00%)	May 2026	980 - 1190
FP-CBB-0100	Cartonboard/boxboard, folding boxboard (GC2) 270-280 g free delivered Germany €/tonne	01 May 2026	980 - 1180	0 (0.00%)	May 2026	980 - 1180
FP-CBB-0099	Cartonboard/boxboard, white-lined chipboard (GD2) 300 g, free delivered France, €/tonne	01 May 2026	700 - 710	0 (0.00%)	May 2026	700 - 710
FP-CBB-0101	Cartonboard/boxboard, white-lined chipboard (GD2) 300 g, free delivered Germany, €/tonne	01 May 2026	680 - 705	0 (0.00%)	May 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 May 2026	980 - 1180	0 (0.00%)	May 2026	980 - 1180
FP-CBB-0101	Cartonboard/boxboard, white-lined chipboard (GD2) 300 g, free delivered Germany, €/tonne	01 May 2026	680 - 705	0 (0.00%)	May 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 May 2026	970 - 1190	0 (0.00%)	May 2026	970 - 1190
FP-CBB-0105	Cartonboard/boxboard, white-lined chipboard (GD2) 300 g, free delivered Spain, €/tonne	01 May 2026	695 - 720	15 (2.17%)	May 2026	695 - 720

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 May 2026	980 - 1190	0 (0.00%)	May 2026	980 - 1190
FP-CBB-0099	Cartonboard/boxboard, white-lined chipboard (GD2) 300 g, free delivered France, €/tonne	01 May 2026	700 - 710	0 (0.00%)	May 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 May 2026	980 - 1190	0 (0.00%)	May 2026	980 - 1190
FP-CBB-0103	Cartonboard/boxboard, white-lined chipboard (GD2) 300 g, free delivered Italy, €/tonne	01 May 2026	680 - 700	0 (0.00%)	May 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 May 2026	975 - 1160	15 (1.43%)	May 2026	975 - 1160
FP-CBB-0095	Cartonboard/boxboard, folding boxboard (GC2) 270-280 g, free delivered United Kingdom, €/tonne	01 May 2026	1126 - 1339	24.5 (2.03%)	May 2026	1126 - 1339
FP-CBB-0096	Cartonboard/boxboard, white-lined chipboard (GD2) 300 g, free delivered United Kingdom, £/tonne	01 May 2026	700 - 750	15 (2.11%)	May 2026	700 - 750
FP-CBB-0097	Cartonboard/boxboard, white-lined chipboard (GD2) 300 g, free delivered United Kingdom, €/tonne	01 May 2026	808 - 866	22 (2.70%)	May 2026	808 - 866