

Boxboard Europe

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Packaging Focus July: Kraftliner prices rise again, RCCM flat; FBB, WLC prices unchanged

By Andrea Venturini, Daniela Wortmann - Thursday 30 July

RCCM stable: Recycled containerboard (RCCM) prices were carried over into July after a previous price increase attempt failed to materialize in June. Paper demand remained fairly flat during the month, with some paper mills reportedly managing production in order to keep the market tight.

Some buyers also managed to obtain price reductions and, in some cases, small concessions of €5-10 (\$6-11) per tonne were registered in Italy. The situation changed in the middle of the month, when the war between the US and Iran restarted, pushing gas and oil prices through the roof. With gas prices reaching up to €60/MWh in the second half of the month, paper mills are now considering further increases in order to restore profitability.

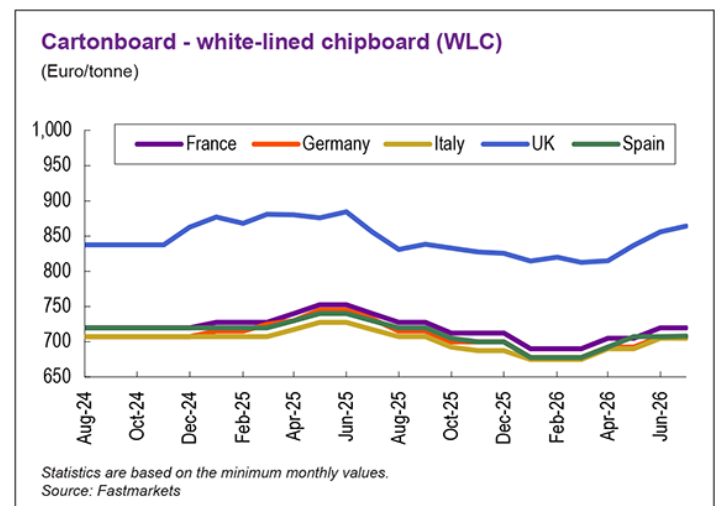
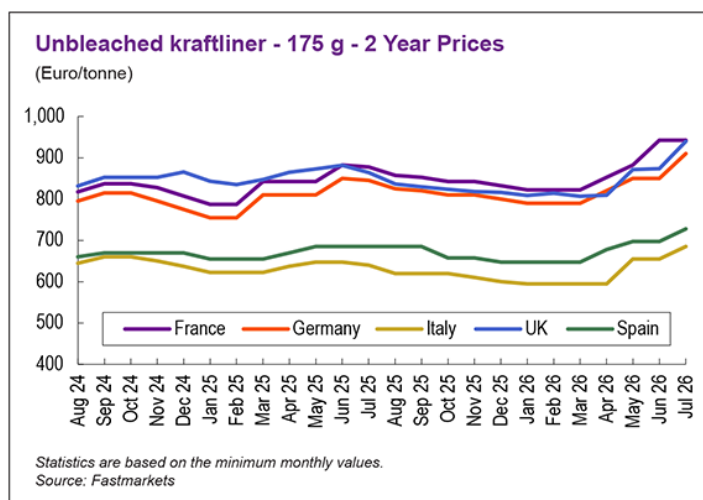
Kraftliner prices on the rise: Unbleached kraftliner (UKL) prices rose by £50 per tonne in the UK in July, while the €60 per tonne increase was mostly spread over July and August in Italy. In Germany, the €60 per tonne price raise was mostly implemented on June 15, although some customers managed to postpone it until July 1. In Spain, some market participants said a €60 per tonne price increase was applied during the month, while others reported stable prices. A similar situation was observed for white-top kraftliner (WTK) and semi-chemical fluting, where a €40 per tonne price increase started to be implemented in the country in July. WTK prices also rose by £35 per tonne in the UK, while the €40 increase was mostly split between July and August in Italy. Semi-chemical fluting paper prices also rose by €40 per tonne in Germany and France, although some customers reported stable prices. In Italy, the €40 per tonne increase was implemented over June and July, and market contacts said prices had increased by a total of €60-70 per tonne since the beginning of the increase in May.

FBB prices unchanged in July: Folding boxboard (FBB) prices, which rose by an average of €30-40 per tonne in the second quarter, remained unchanged in July, with both sellers and buyers confirming the previous month's levels. While several manufacturers said they would have needed larger increases to cover continuously rising costs, they generally agreed that the current geopolitical uncertainties, the undiminished overcapacity in Europe and low consumer confidence did not support further price increases.

Apart from prices, the insolvencies of the FOLBB subsidiaries Baiersbronn Frischfaser Karton and Folding Boxboard Eerbeek remained among the most important topics in the market. Several industry insiders told Fastmarkets they did not believe that the insolvency administrators' efforts would bear fruit. "The Baiersbronn and Eerbeek mills are non-integrated and the machines are old. Who would buy them?" one of them said. However, on Tuesday July 28, it was announced that the 150,000-tonne-per-year Eerbeek mill had been acquired by entrepreneurs Richard Getkate and Siegfried Hohmann and was set to restart operations. Going forward, the site will focus on further developing its product portfolio and strengthening its position in high-performance cartonboard grades, with particular attention to barrier cartonboard solutions.

WLC prices unchanged month on month: On the white-lined chipboard (WLC) side, prices also remained unchanged from the previous month in July. Following average increases of around €30-35 per tonne over the second quarter, market participants told Fastmarkets they did not expect further price changes for now or even until the end of the year. "With the current overcapacity, low consumer confidence and high availability of material from non-European suppliers, higher prices would go hand in hand with a reduction in market share and everybody knows that nobody can afford that," one of them said.

Some buyers said they had asked their suppliers to withdraw any surcharges that were applied in the wake of the Middle East conflict when peace talks between the US and Iran began. However, they admitted that success had been very limited or non-existent.



UK-based packaging solutions provider Paranova to spend £20 million over five years on new fiber-based packaging facility in Godmanchester

By Daniela Wortmann - Wednesday 29 July

UK-based packaging solutions provider Paranova Print and Packaging (Paranova) has unveiled plans to expand its operations.

The company announced on Monday July 27 that it will invest £20 million (\$26.6 million) over the next five years to expand its fiber-based packaging business, beginning with a £6 million investment in a new purpose-built board facility in Godmanchester, Cambridgeshire. The new site, due to open in November, will increase the group's paperboard capacity and strengthen its fiber-based packaging offering.

"Godmanchester will become Paranova's fourth and largest fiber-based facility in the UK, strengthening its ability to support growing demand for paper-based packaging across the fresh produce, convenience and food-to-go sectors. Designed around automation, speed, sustainability and service flexibility, the Godmanchester operation will help customers meet shorter lead times, variable forecasts and the ongoing shift towards paperization," Paranova said.

According to the company, the 98,000-square-foot facility will include manufacturing space, an on-site warehouse, offices and research-and-development functions. Around one-third of the operational footprint will be dedicated to warehousing, giving Paranova the scale and flexibility to support seasonal demand and future expansion.

The first machines are scheduled to arrive in early September, with the facility expected to become operational in November. Once fully operational, the site is expected to employ 150 people.

Following the initial £6 million investment, Paranova plans to commit a further £14 million to additional press and finishing equipment, as well as a fully automated logistics system, to help scale output, improve efficiency and support future growth at the site.

Paranova chief executive officer Jo Ormrod described the investment as a major milestone in the company's growth.

"Godmanchester has been purpose-built to help us meet the increasing pace and complexity our customers require, particularly across fresh produce, convenience and food-to-go. By investing in next-generation print and finishing technology, we are creating a manufacturing environment that supports shorter lead times, greater flexibility and faster speed to market," she said.

"As our largest fiber-based facility to date, the new site gives us the scale to support further expansion while continuing to help customers transition to paper-based packaging solutions," Ormrod added.

FOLBB subsidiary Folding Boxboard Eerbeek to restart operations under new ownership

By Daniela Wortmann - Tuesday 28 July

Folding Boxboard Eerbeek, the Dutch subsidiary of the German folding boxboard (FBB) producer FOLBB, has been bought by entrepreneurs Richard Getkate and Siegfried Hohmann and is set to restart operations.

The mill in Eerbeek, eastern Netherlands, filed for the initiation of insolvency proceedings in **late June**. According to market insiders, production at the 150,000 tonne per year mill has been standing still since then.

"Over the past weeks, Richard Getkate and Siegfried Hohmann, together with investors, employees, customers, suppliers, have worked intensively to realize the restart of the company. As a result, not only has an important industrial business for the region been preserved, but also the jobs of 180 employees," Folding Boxboard Eerbeek said in a statement on Tuesday July 28.

The company added that production will be ramped up in phases. The intention is to restart operations as quickly as possible with a three-shift system, followed by a transition to four shifts, with the ultimate goal of returning to a full five-shift operation.

"Over the past few weeks, we have been deeply impressed by the energy, commitment and resilience of our employees. Together, we have worked hard to make this restart possible, preserving jobs, expertise and industrial capacity for Eerbeek," Getkate and Hohmann commented.

"This gives us confidence in the future. We see a strong future for sustainable cartonboard packaging and believe that Eerbeek can continue to play an important role within the European cartonboard industry over the next 10-15 years," they added.

In the coming years, further investments will be made in the sustainability of the mill's energy systems, improving energy cost control and modernizing the production site in line with the Eerbeek Development Plan. The new owners also called upon Dutch policymakers to take concrete measures that safeguard the future of manufacturing industry in the Netherlands.

"Ambitions regarding sustainability, circularity and strategic autonomy can only be achieved if industrial companies are able to remain competitive and continue investing locally. A strong domestic manufacturing sector is a key prerequisite for maintaining employment, innovation, resilient supply chains and a successful circular economy," they said.

In addition to the operational restart, Folding Boxboard Eerbeek said it is focused on further developing its product portfolio and strengthening its position in high-performance cartonboard grades. Particular attention will be given to expanding its range of barrier cartonboard solutions as a sustainable alternative to plastic-based packaging materials.

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 Jul 2026	980 - 1220	0 (0.00%)	Jul 2026	980 - 1220
FP-CBB-0100	Cartonboard/boxboard, folding boxboard (GC2) 270-280 g free delivered Germany €/tonne	01 Jul 2026	980 - 1210	0 (0.00%)	Jul 2026	980 - 1210
FP-CBB-0099	Cartonboard/boxboard, white-lined chipboard (GD2) 300 g, free delivered France, €/tonne	01 Jul 2026	700 - 740	0 (0.00%)	Jul 2026	700 - 740

Symbol	Description	Date	Price	+/-	Month	Monthly Average
FP-CBB-0101	Cartonboard/boxboard, white-lined chipboard (GD2) 300 g, free delivered Germany, €/tonne	01 Jul 2026	680 - 735	0 (0.00%)	Jul 2026	680 - 735

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 Jul 2026	980 - 1210	0 (0.00%)	Jul 2026	980 - 1210
FP-CBB-0101	Cartonboard/boxboard, white-lined chipboard (GD2) 300 g, free delivered Germany, €/tonne	01 Jul 2026	680 - 735	0 (0.00%)	Jul 2026	680 - 735

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 Jul 2026	970 - 1220	0 (0.00%)	Jul 2026	970 - 1220
FP-CBB-0105	Cartonboard/boxboard, white-lined chipboard (GD2) 300 g, free delivered Spain, €/tonne	01 Jul 2026	695 - 720	0 (0.00%)	Jul 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 Jul 2026	980 - 1220	0 (0.00%)	Jul 2026	980 - 1220
FP-CBB-0099	Cartonboard/boxboard, white-lined chipboard (GD2) 300 g, free delivered France, €/tonne	01 Jul 2026	700 - 740	0 (0.00%)	Jul 2026	700 - 740

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 Jul 2026	980 - 1220	0 (0.00%)	Jul 2026	980 - 1220
FP-CBB-0103	Cartonboard/boxboard, white-lined chipboard (GD2) 300 g, free delivered Italy, €/tonne	01 Jul 2026	680 - 730	0 (0.00%)	Jul 2026	680 - 730

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 Jul 2026	990 - 1175	0 (0.00%)	Jul 2026	990 - 1175
FP-CBB-0095	Cartonboard/boxboard, folding boxboard (GC2) 270-280 g, free delivered United Kingdom, €/tonne	01 Jul 2026	1156 - 1371	11.5 (0.92%)	Jul 2026	1156 - 1371
FP-CBB-0096	Cartonboard/boxboard, white-lined chipboard (GD2) 300 g, free delivered United Kingdom, £/tonne	01 Jul 2026	715 - 765	0 (0.00%)	Jul 2026	715 - 765
FP-CBB-0097	Cartonboard/boxboard, white-lined chipboard (GD2) 300 g, free delivered United Kingdom, €/tonne	01 Jul 2026	835 - 893	8 (0.93%)	Jul 2026	835 - 893