

EUWID Price Watch France

December 2025

Prices in € per tonne free delivered unless otherwise stated	December 2025	November 2025	December 2024
Fine paper			
Woodfree uncoated			
Copy paper 80 g A4 B grade	870 - 960	880 - 960	950 - 1,130
Copy paper 80 g A4 C grade	810 - 900	820 - 910	900 - 1,080
Offset sheets 80 g	900 - 990	900 - 990	980 - 1,100
Offset reels 80 g	830 - 910	830 - 910	900 - 1,050
Woodfree coated			
Sheets, double coated, 100 g	920 - 990	930 - 1,000	980 - 1,100
Reels, double coated, 100 g	870 - 930	870 - 930	910 - 1,050
Publication paper			
Standard newsprint 45 g	600 - 630	600 - 630	600 - 630
Standard newsprint 42 g	610 - 640	610 - 640	610 - 640
Improved newsprint ISO 68, 52 g	650 - 680	650 - 680	650 - 680
LWC offset 60 g	760 - 800	760 - 800	770 - 830
LWC rotogravure 60 g	770 - 810	770 - 810	780 - 840
SC offset 56 g (A)	660 - 700	660 - 700	670 - 720
SC rotogravure 56 g (A)	660 - 700	660 - 700	680 - 730
Corrugated case material			
Primary fibre corrugated case material			
Unbleached kraftliner 175 g+	770 - 870	770 - 870	740 - 830
Semi-chemical fluting	620 - 690	620 - 690	650 - 710
White-top kraftliner 140 g	880 - 990	880 - 990	860 - 990
Recycled corrugated case material			
Recycled fluting 100 g	590 - 625	590 - 625	600 - 625
Recycled fluting 90 g	600 - 640	600 - 640	610 - 640
Testliner II	610 - 650	610 - 650	620 - 650
Testliner III	600 - 635	600 - 635	610 - 635
White-top testliner, grade B, 140 g	700 - 770	700 - 770	700 - 750
Cartonboard			
GD II	820 - 950	820 - 950	810 - 940
GC II	1,120 - 1,300	1,120 - 1,300	1,100 - 1,330

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stant concern. It continues to prevail following a slump in corrugated board consumption in 2023 and the addition of a great deal of new corrugated case material capacity over the past three years. A series of closures of mainly older machines (DS Smith Belišće, Wizpaper, Hamburger Pitten, Pape-terie Saint-Michel, Smurfit Kappa Alfa d'Avignon and most recently Cartiere del Polesine Loreo) over the past two years had trimmed capacity by more than 700,000 tpy. Yet, insiders broadly agreed that further, larger stoppages will be needed to restore the market to a state of balance.

Recycled corrugated case material prices showed little change in December, with kraftliner prices mostly stable, too.

Looking ahead to January, potential price cuts appear to be on the cards for all grades. Producers and buyers were expected to put pen to paper in the third week of December. Views on the outcomes still ranged wildly in the second week of

December, from "wide open" to "highly likely", especially since a few price reductions have apparently been negotiated for December deliveries. Price cuts of roughly €10-20 had been negotiated for all grades apart from white-top testliner in January, where steeper reductions were viewed as a distinct possibility.

Expectations for next year's business remain muted: economic growth is forecast to be modest at best, with many producers planning cautiously and assuming flat volumes or only very slight growth.

Cartonboard prices stable in December as price pressure intensifies in talks about 2026

The final month of the year had no surprises in store for France's cartonboard market. As expected, white-lined chipboard (WLC) and folding boxboard (FBB) prices stayed the same in December after minor price cuts in recent months. Se-

veral agreements run until the end of December, meaning that no additional change in prices was expected before year-end. Discussions in general have now shifted to terms for 2026.

The cartonboard industry's order books remained pretty slim in December. Some manufacturers reported a continuation of the levels seen in recent months, while others felt that they had received slightly fewer orders. For one thing, customers want to end the year with the lowest amount of cartonboard on stock possible, sources said by way of explanation. It should be noted, however, that packaging plants reportedly have not been holding high inventories of late because cartonboard can be sourced at short notice and there is no need to build up stocks. For another, both cartonboard producers and their customers are preparing to take downtime, which has dampened demand here and there.

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