EUWID Price Watch Poland 2025

Prices in PLN/€ per tonne free delivered	First quarter 2025	Second quarter 2025	Third quarter 2025	Fourth quarter 2025
Fine paper				
Woodfree uncoated				
Copy paper 80 g A4 C grade in PLN/t	3,675 - 4,075	3,650 - 4,150	3,450 - 3,900	3,275 - 3,750
Copy paper 80 g A4 C grade in €/t	879 - 975	859 - 975	809 - 915	779 - 892
Offset sheets 80 g in PLN/t	3,975 - 4,275	3,975 - 4,350	3,875 - 4,275	3,625 - 4,000
Offset sheets 80 g in €/t	951 - 1,023	935 - 1,023	909 - 1,003	862 - 951
Offset reels 80 g in PLN/t	3,850 - 4,175	3,850 - 4,175	3,700 - 4,100	3,450 - 3,800
Offset reels 80 g in €/t	921 - 999	906 - 982	868 - 962	821 - 904
Woodfree coated				
Sheets, double coated, 100 g in PLN/t	4,275 - 4,600	4,200 - 4,550	4,050 - 4,475	3,800 - 4,125
Sheets, double coated, 100 g in €/t	1,023 - 1,101	988 - 1,071	950 - 1,050	900 - 980
Reels, double coated, 100 g in PLN/t	3,975 - 4,175	3,950 - 4,125	3,750 - 4,050	3,525 - 3,800
Reels, double coated, 100 g in €/t	951 - 999	929 - 971	880 - 950	840 - 900
Publication paper in €/t				
Standard newsprint 45 g	580 - 610	580 - 600	560 - 590	560 - 585
LWC offset 60 g	750 - 800	750 - 790	750 - 775	740 - 760
SC offset 56 g (A)	660 - 710	660 - 700	660 - 685	650 - 670
Corrugated case material in €/t				
Primary fibre corrugated case material				
Unbleached kraftliner from Europe 175 g	670 - 780	730 - 820	740 - 790	730 - 760
White-top kraftliner 140 g	900 - 990	940 - 1,030	940 - 1,030	920 - 1,030
Recycled corrugated case material				
Recycled fluting	420 - 555	500 - 595	440 - 555	410 - 495
Testliner II	460 - 585	540 - 625	480 - 585	450 - 525
Testliner III	440 - 565	520 - 605	460 - 565	430 - 505
White-top testliner 140 g	540 - 650	580 - 650	560 - 620	520 - 590
Cartonboard in €/t				
GD II	790 - 830	820 - 860	790 - 860	770 - 810
GC II	1,150 - 1,200	1,150 - 1,200	1,100 - 1,150	1,050 - 1,100

Exchange rate as of 22 December 2025: 1 PLN = €0.2379

EUWID assumes no liability for the accuracy of the pricing information

Experts anticipated that the Polish corrugated board market grew by around 3.5 to 4 per cent in volume terms in 2025. However, this growth is not equally reflected in all companies' day-to-day business. Competitive pressure persists nonetheless. Poland is regarded as one of Europe's most modern and productive corrugated board markets, which boosts its competitiveness but has also resulted in significant overcapacity in converting. Observers estimate this at roughly one-third of existing capacity.

Competition for business remains therefore intense. Growth is distributed selectively, and, according to insiders, largely benefited big, integrated and internationally active groups last year. Privately owned and family-run converters came under noticeably greater pressure.

Looking ahead, EUWID contacts in Poland still expect the market to grow. The country is viewed as one of the few European markets where significant gains are anticipated in 2026. At the same time, industry representatives foresee persistently high volatility, with structural overcapacity, fierce competition and unevenly distributed growth set to continue shaping market conditions.

Demand for cartonboard relatively stable in 2025

The Polish cartonboard market was volatile but rather stable on the whole in 2025. Demand felt the impact of the weak economic climate throughout Europe, lingering uncertainty and trade policy risks, but folding box production proved to be more robust in Poland than in many Western European countries. Once again, Poland ranked among the more stable markets, according to experts.

One key factor was solid demand on the domestic market. Another was that Polish plants benefited from production shifts within pan-European packaging groups, which gathered further pace in 2025. Business that was no longer profitable in Western Europe was moved to Poland, with deliveries sent from there to Germany and other destinations. Lower non-wage labour costs and good logistical links also supported generally decent plant utilisation, including in the fourth quarter.

In the final three months of last year, Poland's cartonboard market lacked clear direction, with demand fluctuating: October was described as fairly solid, while November fell well short of expectations in some cases. EUWID sources had mixed views when it came to the shorter trading month of December.

Overall, conditions remain tense, with no clear signals of either a marked upturn or a further deterioration at the start of 2026. In many instances, safeguarding order volumes is taking precedence over profitability, which is being pushed into the background. Accordingly, the willingness to compete on price is high, observers told EUWID. For primary fibre-based cartonboard, this is linked to new capacity and lingering import pressure from Asia. In the recycled cartonboard segment, however, cool demand and substitution in favour of primary-fibre board grades are hitting capacity utilisation.

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