

EUWID Price Watch UK

December 2025

Prices in £ per tonne free delivered unless otherwise stated	December 2025 £	December 2025 €*	November 2025 £	December 2024 £
Fine paper				
Woodfree uncoated				
Copy paper 80 g A4 B grade	760 - 820	866 - 935	760 - 820	840 - 960
Copy paper 80 g A4 C grade	710 - 790	809 - 901	720 - 790	810 - 930
Offset sheets 80 g	810 - 860	923 - 980	810 - 860	890 - 970
Offset reels 80 g	730 - 800	832 - 912	740 - 800	810 - 930
Woodfree coated				
Sheets, double coated, 115 g	820 - 890	935 - 1,015	830 - 890	910 - 980
Reels, double coated, 100 g	770 - 820	878 - 935	770 - 820	810 - 910
Publication paper				
Standard newsprint 45 g	480 - 510	547 - 581	480 - 510	480 - 510
Standard newsprint 42.5 g	490 - 520	559 - 593	490 - 520	490 - 520
Standard newsprint 40 g	500 - 530	570 - 604	500 - 530	500 - 530
Improved newsprint 52 g, ISO 68	530 - 560	604 - 638	530 - 560	530 - 560
LWC offset 60 g	660 - 695	752 - 792	660 - 695	680 - 730
SC offset 56 g (A)	580 - 605	661 - 690	580 - 605	600 - 640
Corrugated case material				
Primary fibre corrugated case material				
Unbleached kraftliner 175 g+, European quality	695 - 745	792 - 849	695 - 745	670 - 735
White-top kraftliner 140 g, European quality	805 - 875	918 - 998	805 - 875	785 - 865
Recycled corrugated case material				
Recycled fluting 100 g	520 - 575	593 - 656	530 - 575	545 - 575
Recycled fluting 90 g	520 - 580	593 - 661	530 - 580	545 - 580
Recycled fluting 85 g	530 - 590	604 - 673	540 - 590	555 - 590
Testliner II	540 - 595	616 - 678	550 - 595	565 - 595
Testliner III	520 - 575	593 - 656	530 - 575	545 - 575
White-top testliner, grade B, 140 g	640 - 700	730 - 798	640 - 700	650 - 700
Cartonboard				
GD II	560 - 640	638 - 730	570 - 660	650 - 725
GC II	880 - 1,000	1,003 - 1,140	880 - 1,010	930 - 1,010

* Exchange rate as of 12 December 2025: £1 = €1.14

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willingness to make price concessions in order to secure volumes is likely to increase further.

Demand on the UK market for corrugated sheets and packaging in December was described by most EUWID sources as "okay". Some even reported full order books into the new year, while others characterised developments as rather disappointing. However, many market participants were at least able to partly compensate for weak volumes in the summer and are ending the year "reasonably well".

Isolated reports continue to mention very long lead times for corrugated sheets – in some cases extending into February. Market insiders believe that this cannot be explained by the general demand situation, but is apparently linked to customer-specific projects that are not being prioritised by producers.

For 2026, most sources expect slight volume growth. At the same time, however, criticism is

voiced that the UK market lacks overall economic momentum, and that the Labour government failed to set any significant growth stimuli in its 2026 budget. In addition, geopolitical uncertainties continue to dampen consumption and investment sentiment.

Rising price pressure on the UK cartonboard market

Demand on the UK cartonboard market remained erratic in December 2025 and showed no signs of a recovery. The Christmas business, which is usually concentrated in the third quarter, failed to materialise, and there have been hardly any impulses since then.

Only at the very last minute did some customers engage in "panic buying", apparently having calculated too tightly beforehand in view of the oversupply of cartonboard. While availability of board remains very good, suppliers report signifi-

cant bottlenecks in logistics capacities. However, this has nothing to do with an increase in demand.

An increasing number of volumes are now being put out to tender – including projects where this was not common practice in the past. Customers who previously specified the cartonboard to be used by box manufacturers have meanwhile become more flexible, provided the price difference is large enough.

Competition is also intensifying for short-term projects. "Customers do not stick to agreements, refuse to take agreed volumes or demand renegotiations," one seller reports. The market is increasingly being driven purely by price. Suppliers unwilling to follow this trend are losing volumes and later have to try to win them back at even lower prices.

Against the backdrop of a weak market environment, persistent cost pressure and strong com-

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