

## EUWID Price Watch UK

July 2025

Prices in £ per tonne free delivered  
unless otherwise stated

July 2025

£

July 2025

€\*

June 2025

£

July 2024

£

## Fine paper

## Woodfree uncoated

Copy paper 80 g A4 B grade	790 - 860	916 - 998	830 - 870	890 - 1,000
Copy paper 80 g A4 C grade	750 - 830	870 - 963	790 - 840	860 - 970
Offset sheets 80 g	860 - 920	998 - 1,067	880 - 920	920 - 1,010
Offset reels 80 g	790 - 850	916 - 986	800 - 880	860 - 970

## Woodfree coated

Sheets, double coated, 115 g	870 - 940	1,009 - 1,090	890 - 940	940 - 1,010
Reels, double coated, 100 g	790 - 850	916 - 986	800 - 860	860 - 950

## Publication paper

Standard newsprint 45 g	480 - 510	557 - 592	480 - 510	480 - 510
Standard newsprint 42.5 g	490 - 520	568 - 603	490 - 520	490 - 520
Standard newsprint 40 g	500 - 530	580 - 615	500 - 530	500 - 530
Improved newsprint 52 g, ISO 68	530 - 560	615 - 650	530 - 560	530 - 560
LWC offset 60 g	660 - 700	766 - 812	660 - 700	680 - 730
SC offset 56 g (A)	580 - 610	673 - 708	580 - 610	600 - 640

## Corrugated case material

## Primary fibre corrugated case material

Unbleached kraftliner 175 g+, European quality	720 - 770	835 - 893	720 - 770	690 - 735
White-top kraftliner 140 g, European quality	805 - 875	934 - 1015	805 - 875	795 - 865

## Recycled corrugated case material

Recycled fluting 100 g	555 - 605	644 - 702	555 - 605	565 - 595
Recycled fluting 90 g	555 - 610	644 - 708	555 - 610	565 - 600
Recycled fluting 85 g	565 - 620	655 - 719	565 - 620	575 - 610
Testliner II	575 - 625	667 - 725	575 - 625	585 - 615
Testliner III	555 - 605	644 - 702	555 - 605	565 - 595
White-top testliner, grade B, 140 g	660 - 720	766 - 835	660 - 720	670 - 720

## Cartonboard

GD II	620 - 690	719 - 800	620 - 715	650 - 750
GC II	930 - 1,010	1,079 - 1,172	930 - 1,010	900 - 1,010

\* Exchange rate as of 18 July 2025: £1 = €1.16

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Downward price pressure expected for  
containerboard as demand remains weak

Demand for containerboard and corrugated sheets and packaging in the UK remained below expectations in July. EUWID sources attribute this to a combination of ongoing geopolitical tensions, global economic uncertainty, and domestic economic pressures, such as higher National Insurance contributions since April, an increased minimum wage, and persistently high inflation, which stood at 3.6 per cent in July.

The potential for increased demand for corrugated packaging, driven by higher defence spending in Europe, may eventually support demand for corrugated packaging but will require some time to materialise.

The weaker packaging demand has once again led to rising European containerboard inventories. For recycled grades, a year-on-year increase

of around 20 per cent is reported. For kraftliner, the increase is said to be in the high single-digit range. Many producers are responding with temporary machine stoppages, reduced output, or extended maintenance downtime. According to market rumours, machine utilisation in July was below 80 per cent.

With recovered paper prices falling and the second price round for recycled containerboard being reversed on the Continent, a second hike now also seems off the table in the UK. Prices remained stable in July, but signs of growing downward pressure are mounting. The spot market is currently very active, and European suppliers are said to be offering aggressively low prices.

Should the first price round be corrected on the continent, UK prices are likely to follow suit swiftly, one buyer said. Some market observers already anticipate a further price weakening in August, while others note that the UK typically

reacts with a one-month delay to continental trends.

Similar developments are being reported for kraftliner. A second price hike is not expected, and pressure to lower prices is building. Some players report already having secured price cuts for August, while others expect kraftliner prices to respond more slowly to developments than prices for recycled grades.

With existing paper overcapacity, many eyes are on Eren Paper's new containerboard machine in Shotton, North Wales, which is scheduled to start up next year. Many market players believe further consolidation in the UK is inevitable. They expect Eren's parent company, Modern Karton from Turkey, to acquire more converters in the UK and are speculating on potential takeover targets. Several insiders also see further consolidation on a European level as unavoidable.

► continued on page 4