EUWID Price Watch UK
October 2025

Prices in £ per tonne free delivered unless otherwise stated	October 2025 £	October 2025 €*	September 2025 £	October 2024 £
Fine paper				
Woodfree uncoated				
Copy paper 80 g A4 B grade	760 - 830	874 - 955	770 - 840	880 - 1,000
Copy paper 80 g A4 C grade	720 - 800	828 - 920	730 - 810	850 - 970
Offset sheets 80 g	810 - 870	932 - 1,001	830 - 890	910 - 1,010
Offset reels 80 g	740 - 810	851 - 932	760 - 820	850 - 970
Woodfree coated				
Sheets, double coated, 115 g	840 - 900	966 - 1,035	850 - 920	930 - 1,010
Reels, double coated, 100 g	770 - 830	886 - 955	780 - 840	850 - 950
Publication paper				
Standard newsprint 45 g	480 - 510	552 - 587	480 - 510	480 - 510
Standard newsprint 42.5 g	490 - 520	564 - 598	490 - 520	490 - 520
Standard newsprint 40 g	500 - 530	575 - 610	500 - 530	500 - 530
Improved newsprint 52 g, ISO 68	530 - 560	610 - 644	530 - 560	530 - 560
LWC offset 60 g	660 - 695	759 - 799	660 - 700	680 - 730
SC offset 56 g (A)	580 - 605	667 - 696	580 - 610	600 - 640
Corrugated case material				
Primary fibre corrugated case material				
Unbleached kraftliner 175 g+, European quality	695 - 745	799 - 875	695 - 745	715 - 770
White-top kraftliner 140 g, European quality	805 - 875	926 - 1,006	805 - 875	830 - 890
Recycled corrugated case material				
Recycled fluting 100 g	530 - 575	610 - 661	530 - 580	565 - 595
Recycled fluting 90 g	530 - 580	610 - 667	530 - 585	565 - 600
Recycled fluting 85 g	540 - 590	621 - 679	540 - 595	575 - 610
Testliner II	550 - 595	633 - 684	550 - 600	585 - 615
Testliner III	530 - 575	610 - 661	530 - 580	565 - 595
White-top testliner, grade B, 140 g	640 - 700	736 - 805	640 - 700	670 - 720
Cartonboard				
GD II	570 - 660	656 - 759	600 - 680	650 - 725
GC II	880 - 1,010	1,012 - 1,162	910 - 1,010	920 - 1,010

* Exchange rate as of 24 October 2025: £1 = €1.15

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due to any real rebound in demand but to production bottlenecks.

Capacity for corrugated sheets and packaging in the UK had already been reduced earlier in the year, which had improved utilisation for other suppliers. In October, one large manufacturer reportedly encountered temporary delivery disruptions due to software problems. Another producer was heavily tied up with orders from a key customer and either offered new delivery slots only from January or increased its sheet prices by up to 20 per cent. This situation benefitted smaller competitors.

Many of these smaller players had already reported satisfactory capacity utilisation in September – not least thanks to reduced overall processing capacity – and were expecting a "fairly positive fourth quarter." The latest developments have also allowed them to raise prices here and there and ease some margin pressure.

Nevertheless, this positive trend needs to be seen in the context of an overall weak 2025, when the market will grow only marginally. "It could be much better, but also much worse," commented producers of corrugated packaging and displays.

Little seasonal demand on British market for cartonboard

Market dynamics for cartonboard in the UK have changed little compared to the previous month. Demand remains weak, with hoped-for seasonal impulses from Halloween and Christmas failing to materialise or falling short of expectations.

At the same time, supply remains abundant, supported by new capacity in Europe and continued high imports from Asia. In addition to Stora Enso's new board machine in Oulu, Metsä Board's Simpele mill is now back on stream following modernisation. According to the company, the rebuild has primarily improved the quality of its "FBB Classic" product. However earlier information also suggested an increase in capacity of around 10,000 tpy.

Asian suppliers, who in the past shipped to the UK only sporadically depending on market conditions and costs, are now more consistently present. They have established closer relationships with British merchants and end users. Market observers say that, as feared, volumes originally destined for the US market are now being diverted to Europe due to high US import tariffs. There are said to be Asian board machines specifically configured for the US and European markets.

Low and relatively stable freight rates continue to support these imports. However, awareness of the vulnerability of transport routes and the potential volatility of freight rates remains high among converters and end users in the current geopolitical environment. As a result, the penetration of Asian suppliers into the UK market is growing, but remains limited.

Their sometimes extremely low prices, however, continue to put strong pressure on the market and are now influencing the price structure of European

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