EUWID Price Watch Germany
January 2025

Prices in € per tonne free delivered unless otherwise stated	January 2025	December 2024	January 2024
Fine paper			
Woodfree uncoated			
A4 C-grade, branded paper	920 - 1,010	950 - 1,010	940 - 1,010
A4 C-grade, non-branded paper	870 - 950	900 - 960	890 - 910
Offset sheets 80 g	1,020 - 1,110	1,020 - 1,130	1,030 - 1,110
Offset reels 80 g	950 - 1,010	950 - 1,030	960 - 1,010
Woodfree coated			
Sheets, double coated, 100 g	1,020 - 1,110	1,020 - 1,120	1,000 - 1,100
Reels, double coated, 100 g	940 - 990	940 - 1,000	950 - 1,010
Publication paper			
Newsprint 45 g (coldset)	600 - 625	600 - 630	570 - 620
Newsprint 42.5 g (coldset)	610 - 635	610 - 640	580 - 630
Newsprint 45 g (heatset)	600 - 625	600 - 630	570 - 620
LWC offset 60 g	780 - 810	780 - 820	780 - 830
LWC rotogravure 60 g	800 - 820	800 - 835	810 - 850
SC offset 56 g (A)	680 - 700	680 - 710	660 - 720
SC rotogravure 56 g (A)	680 - 700	680 - 710	660 - 720
Corrugated case material			
Primary fibre corrugated case material			
Unbleached kraftliner from Scandinavia 175 g	830 - 850 [2)]	830 - 850	730 - 750
Semi-chemical corrugated medium [1)]	775 - 1,000	775 - 1,000	705 - 880
White-top kraftliner 140 g	1,050 - 1,130	1,050 - 1,150	970 - 1,030
Recycled corrugated case material			
Schrenz	550 - 570 [2)]	550 - 570	490 - 510
Wellenstoff	580 - 600 [2)]	580 - 600	520 - 540
Testliner II	610 - 630 [2)]	610 - 630	550 - 570
Testliner III	590 - 610 [2)]	590 - 610	530 - 550
White-top testliner, coated	890 - 930	890 - 930	850 - 870
White-top testliner, 140 g, ISO 70-75	770 - 785	770 - 785	710 - 725
Cartonboard			
Unlined chipboard	815 - 855	815 - 855	790 - 845
GD II	850 - 950	850 - 950	825 - 930
GC II	1,240 - 1,275	1,210 - 1,235	1,210 - 1,235

1) Prices at the upper end of the range represent Scandinavian primary fibre grades, lower-end prices are quoted for other European grades.
2) Some prices decreased by another 20 €/t in January.

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was being held up against the boom years of the coronavirus pandemic and therefore the figures in recent years cannot be realistically compared with each other. Taking as a benchmark 2019, the last year before the outbreak of the coronavirus pandemic, the current market development is only slightly below the levels at that time, EUWID was told.

Nevertheless, players say the current business development is what counts and this remains volatile, unsatisfactory and shaped by uncertainty about the future. The first half of January was still influenced by the holiday season, while the second half of the month was comparable with the prior year, the market survey found. This also means that business associated with the automotive sector in particular remained very sluggish. Everything else is generally moving sideways, EUWID was told. In the food segment, there is strong competitive pressure, while business is picking up slightly in the e-commerce sector.

After quotes for corrugated case material steadily ticked lower last year, companies had to make price concessions for corrugated board and packaging, as well. However, the corrugated industry is faced with calls for markedly higher prices from their paper suppliers. Price hikes are being pursued for all corrugated case material grades and are basically the same amount, only the timing varies. Producers aim for recycled corrugated case material prices to rise in February, followed by fresh-fibre paper prices in March.

Market players expect the announcement of higher paper prices to put a stop to the negative price trend for corrugated board and packaging. Sales staff in the corrugated industry have been reportedly told by their employers to forego contracts if the price pressure persists. If prices for recycled corrugated case material do in fact rise as targeted, there will be no further leeway for price concessions in the corrugated board segment without spilling a lot of red ink, industry representatives say.

When the market survey was conducted in the final days of January, it looked like paper mills would be vehemently pursuing their pricing plans and were prepared, if necessary, to remove volumes from their own market. □