

## EUWID Price Watch UK

May 2025

Prices in £ per tonne free delivered unless otherwise stated	May 2025 £	May 2025 €*	April 2025 £	May 2024 £
<b>Fine paper</b>				
Woodfree uncoated				
Copy paper 80 g A4 B grade	830 - 890	989 - 1,059	830 - 890	890 - 1,000
Copy paper 80 g A4 C grade	790 - 860	940 - 1,023	790 - 860	860 - 970
Offset sheets 80 g	880 - 920	1,047 - 1,095	880 - 920	920 - 1,010
Offset reels 80 g	800 - 880	952 - 1,047	800 - 880	860 - 970
Woodfree coated				
Sheets, double coated, 115 g	890 - 940	1,059 - 1,119	890 - 940	940 - 1,010
Reels, double coated, 100 g	800 - 860	952 - 1,023	800 - 860	860 - 950
<b>Publication paper</b>				
Standard newsprint 45 g	480 - 510	571 - 607	480 - 510	440 - 490
Standard newsprint 42.5 g	490 - 520	583 - 619	490 - 520	450 - 500
Standard newsprint 40 g	500 - 530	595 - 631	500 - 530	460 - 510
Improved newsprint 52 g, ISO 68	530 - 560	631 - 666	530 - 560	490 - 530
LWC offset 60 g	660 - 700	785 - 833	660 - 700	680 - 730
SC offset 56 g (A)	580 - 610	690 - 726	580 - 610	600 - 640
<b>Corrugated case material</b>				
Primary fibre corrugated case material				
Unbleached kraftliner 175 g+, European quality	720 - 755	857 - 898	720 - 755	615 - 700
White-top kraftliner 140 g, European quality	785 - 875	934 - 1,041	785 - 845	730 - 825
Recycled corrugated case material				
Recycled fluting 100 g	555 - 605	660 - 720	555 - 605	530 - 560
Recycled fluting 90 g	555 - 610	660 - 726	555 - 610	530 - 565
Recycled fluting 85 g	565 - 620	672 - 738	565 - 620	540 - 575
Testliner II	575 - 625	684 - 744	575 - 625	550 - 580
Testliner III	555 - 605	660 - 720	555 - 605	530 - 560
White-top testliner, grade B, 140 g	640 - 700	762 - 833	640 - 680	620 - 700
<b>Cartonboard</b>				
GD II	620 - 715	738 - 851	620 - 715	650 - 750
GC II	930 - 1,010	1,107 - 1,202	930 - 1,010	900 - 1,010

\* Exchange rate as of 23 May 2025: £1 = €1.19

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slight growth. "The lack of dynamism in the overall economy is also noticeable in demand for cartonboard," says one market insider. The good weather has boosted consumption slightly, but because of higher social security contributions and the increase in minimum wage, many companies are keeping their staffing levels as low as possible for now. In the medium term, the higher minimum wage in particular is expected to boost consumption, but for now, the higher costs faced by companies are hampering economic growth, EUWID was told.

Prices for GD (white-lined chipboard, WLC) and GC (folding boxboard, FBB) were broadly unchanged in May. There is persistent – or even growing – pressure from Asian producers offering significantly lower prices, according to insiders. Chinese producers have apparently lowered their prices for GC yet again. European producers say they therefore feel repeatedly forced to grant special prices or make special deals.

Experts believe that the battle to secure volumes in the market will continue and possibly even intensify. European board producers are therefore likely to face increasing pressure, insiders say.

Producers of recycled board report that there is a growing pressure to switch to GC as the price difference is too small. Chinese GC often costs only £50/t more than GD. One supplier commented that "false sustainability claims are also being made here." Simultaneously, there are signs that prices of GD could rise from September, since producers of unlined chipboard have now succeeded in raising their prices.

One player questioned whether GD could disappear completely, owing to the current price situation. "Customers will now only choose GD if they are explicitly looking for a recycled product," said a different respondent.

In response to the growing pressure from Asian

producers, some suppliers are calling for countervailing duties to be applied. Chinese board in particular is being subsidised and this will ruin the European supply landscape in the long term, they say. However, it is also clear that many converters still prefer to use European cartonboard. "The uncertainty is palpable and customers still vividly recall the delivery bottlenecks during the pandemic," said one expert.

Simultaneously, there are rays of hope on the horizon. Substituting single-use plastic products is still a hot topic and there are a growing number of solutions and finished products on the market. It is only a question of time until this market picks up speed, one expert is convinced. And further new product launches, often associated with new packaging, are in the pipeline, EUWID was told. "We have now reached the trough in the market," one supplier insists. Other players echo this optimism, pointing to fuller order books. □