

## EUWID Price Watch France

August 2025

Prices in € per tonne free delivered  
unless otherwise stated

August 2025

July 2025

August 2024

## Fine paper

## Woodfree uncoated

|                            |             |             |               |
|----------------------------|-------------|-------------|---------------|
| Copy paper 80 g A4 B grade | 910 - 1,020 | 910 - 1,020 | 1,030 - 1,170 |
| Copy paper 80 g A4 C grade | 860 - 970   | 860 - 970   | 980 - 1,120   |
| Offset sheets 80 g         | 960 - 1,040 | 960 - 1,040 | 1,040 - 1,140 |
| Offset reels 80 g          | 890 - 970   | 890 - 970   | 980 - 1,100   |

## Woodfree coated

|                              |             |             |               |
|------------------------------|-------------|-------------|---------------|
| Sheets, double coated, 100 g | 960 - 1,060 | 960 - 1,060 | 1,030 - 1,150 |
| Reels, double coated, 100 g  | 900 - 990   | 900 - 990   | 990 - 1,100   |

## Publication paper

|                                 |           |           |           |
|---------------------------------|-----------|-----------|-----------|
| Standard newsprint 45 g         | 600 - 630 | 600 - 630 | 600 - 630 |
| Standard newsprint 42 g         | 610 - 640 | 610 - 640 | 610 - 640 |
| Improved newsprint ISO 68, 52 g | 650 - 680 | 650 - 680 | 650 - 680 |
| LWC offset 60 g                 | 760 - 810 | 760 - 810 | 770 - 830 |
| LWC rotogravure 60 g            | 770 - 820 | 770 - 820 | 780 - 840 |
| SC offset 56 g (A)              | 660 - 710 | 660 - 710 | 670 - 720 |
| SC rotogravure 56 g (A)         | 660 - 710 | 660 - 710 | 680 - 730 |

## Corrugated case material

## Primary fibre corrugated case material

|                              |           |           |           |
|------------------------------|-----------|-----------|-----------|
| Unbleached kraftliner 175 g+ | 770 - 890 | 800 - 910 | 780 - 870 |
| Semi-chemical fluting        | 630 - 690 | 640 - 700 | 650 - 710 |
| White-top kraftliner 140 g   | 880 - 990 | 880 - 990 | 850 - 950 |

## Recycled corrugated case material

|                                     |           |           |           |
|-------------------------------------|-----------|-----------|-----------|
| Recycled fluting 100 g              | 610 - 645 | 640 - 665 | 660 - 685 |
| Recycled fluting 90 g               | 620 - 660 | 650 - 680 | 670 - 700 |
| Testliner II                        | 630 - 670 | 660 - 690 | 680 - 710 |
| Testliner III                       | 620 - 655 | 650 - 675 | 670 - 695 |
| White-top testliner, grade B, 140 g | 700 - 770 | 720 - 790 | 720 - 770 |

## Cartonboard

|       |               |               |               |
|-------|---------------|---------------|---------------|
| GD II | 840 - 970     | 840 - 970     | 810 - 940     |
| GC II | 1,140 - 1,330 | 1,140 - 1,330 | 1,100 - 1,330 |

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Overcapacity is less of an issue, and market insiders also point out that maintenance shutdowns planned by producers for the period up to autumn are expected to reduce supply pressure. However, kraftliner manufacturers are also hoping for a pick-up in demand from the packaging industry, which has not yet materialised to the desired extent this year.

## Seasonal lull in demand for cartonboard arrives, but prices remain steady

A period of summertime calm has set in on France's cartonboard market. A few market players had observed in July that the summer downturn began pretty early this year. Not everyone shared this view, but business activity did diminish and demand cooled in August at the latest, produces of both recycled board (White-lined chipboard – WLC) and fresh fibre board (folding

boxboard – FBB) told EUWID. One packaging producer also remarked that August had started on a weak note. That being said, several manufacturers were relatively pleased with order intake on the whole. Although ordering was not high, it was in line with expectations, they said, pointing to the seasonal lull.

August had been expected to bring a slowdown in demand, as normal. After all, many companies in the packaging industry traditionally shut down for maintenance during this period. Sources told EUWID in the first half of August that these stoppages usually lasted one to two weeks in France, and this year was no exception. Demand for cartonboard decreased as a result. Some cartonboard producers were reportedly also planning downtime measures in Europe, though not all companies or mills were involved.

French prices did not alter in August. Prices for WLC have recently come under pressure, parti-

cularly because recovered paper prices have fallen sharply in a short period of time. As a result, discounts were reportedly granted for GD 2 here and there back in July to encourage buyers to purchase a little more. However, market players cautioned that this was not a market-wide phenomenon in France, with the majority of prices and list prices left untouched.

This situation continued to play out in August. Recovered paper prices remained low but did not go any lower in France and GD 2 prices remained stable. One packaging manufacturer reported an attempt to renegotiate and reduce GD board prices in quarterly contracts because of low recovered paper prices, albeit with no success. Suppliers underscored their tight margins and the fact that recovered paper was still more expensive than in March, when prices started to soar.

Slim margins were a reason cited by FBB producers, too, in their efforts to fend off price cuts. Buy-