

EUWID Price Watch France

January 2025

Prices in € per tonne free delivered unless otherwise stated	January 2025	December 2024	January 2024
Fine paper			
Woodfree uncoated			
Copy paper 80 g A4 B grade	950 - 1,080	950 - 1,130	970 - 1,130
Copy paper 80 g A4 C grade	900 - 1,030	900 - 1,080	920 - 1,080
Offset sheets 80 g	980 - 1,070	980 - 1,100	980 - 1,110
Offset reels 80 g	900 - 1,000	900 - 1,050	930 - 1,060
Woodfree coated			
Sheets, double coated, 100 g	980 - 1,080	980 - 1,100	970 - 1,110
Reels, double coated, 100 g	910 - 1,020	910 - 1,050	930 - 1,060
Publication paper			
Standard newsprint 45 g	600 - 630	600 - 630	580 - 630
Standard newsprint 42 g	610 - 640	610 - 640	580 - 640
Improved newsprint ISO 68, 52 g	650 - 680	650 - 680	620 - 670
LWC offset 60 g	770 - 830	770 - 830	780 - 850
LWC rotogravure 60 g	780 - 840	780 - 840	810 - 880
SC offset 56 g (A)	670 - 720	670 - 720	680 - 740
SC rotogravure 56 g (A)	670 - 720	680 - 730	700 - 750
Corrugated case material			
Primary fibre corrugated case material			
Unbleached kraftliner 175 g+	720 - 810	740 - 830	640 - 730
Semi-chemical fluting	640 - 700	650 - 710	570 - 630
White-top kraftliner 140 g	840 - 990	860 - 990	770 - 870
Recycled corrugated case material			
Recycled fluting 100 g	580 - 605	600 - 625	520 - 545
Recycled fluting 90 g	590 - 620	610 - 640	530 - 560
Testliner II	600 - 630	620 - 650	540 - 570
Testliner III	590 - 615	610 - 635	530 - 555
White-top testliner, grade B, 140 g	680 - 730	700 - 750	640 - 690
Cartonboard			
GD II	810 - 940	810 - 940	780 - 910
GC II	1,140 - 1,330	1,100 - 1,330	1,100 - 1,280

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prices for brown and white grades by €100/t as of 1 February. In one instance, the announcement for white-top testliner was €120/t. For brown kraftliner, price steps of €100/t are also planned, but these would only take effect as of 1 March. Other producers of corrugated case material had not yet made any decision in this regard, but say that they might make similar moves.

These announcements are coming in a market environment shaped by overcapacity where demand is average at best, critics note. It is plausible that manufacturers are complaining about thin margins due to high costs, but it seems like this initiative is more of an attempt to get ahead of calls for price reductions, they say.

In January, there are some paper orders being placed to replenish inventories and the export business is currently good with a rising price trend, producers say. However, the actual consumption of corrugated board and corrugated case material

remains modest owing to the subdued economy in Europe.

In the first quarter, the rebuilt paper machine at Norske Skog's Golbey mill is slated to begin producing recycled corrugated case material. This is just one of several capacity additions within the span of a few years. The corrugated board market will need to grow significantly to absorb all of these additional production volumes. But there are currently no signs of such expansive growth, say market participants, although they point out that it is still too early to say in mid-January where the market will be heading this year.

Last year, the market for corrugated board in Europe grew by an estimated 2-4 per cent compared with the previous year, but precise figures are not yet available. The growth in France is believed to be somewhere near this average. Yet, it is clear that this was not sufficient to fully compensate for the steep decline in 2023.

Prices for GD board remain stable for now

The month of January was in many respects a continuation of the previous month on the French market for cartonboard. There was no particular demand impetus and prices barely changed. Many new contracts were signed, but not all the talks on prices and conditions in the new year had been concluded by the time of the EUWID market survey.

Prices on the GD board market appear to remain stable in January. In recent months, some producers of GD 2 had announced hikes ranging from €50 to €80/t for the beginning of 2025. But, with a few exceptions, they have not been able to implement any mark-ups so far. This was proving very difficult in the current market situation, which did not look like it would be improving anytime soon, several players said. Converters had put up opposition to

► continued on page 4