EUWID Price Watch France

October 2025

Prices in € per tonne free delivered unless otherwise stated	October 2025	September 2025	October 2024
Fine paper			
Woodfree uncoated			
Copy paper 80 g A4 B grade	880 - 980	890 - 1,000	1,010 - 1,170
Copy paper 80 g A4 C grade	820 - 930	840 - 950	960 - 1,120
Offset sheets 80 g	910 - 1,000	920 - 1,020	1,020 - 1,140
Offset reels 80 g	850 - 930	850 - 950	950 - 1,100
Woodfree coated			
Sheets, double coated, 100 g	950 - 1,020	950 - 1,040	1,010 - 1,150
Reels, double coated, 100 g	890 - 950	890 - 970	960 - 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 - 800	760 - 810	770 - 830
LWC rotogravure 60 g	770 - 810	770 - 820	780 - 840
SC offset 56 g (A)	660 - 700	660 - 710	670 - 720
SC rotogravure 56 g (A)	660 - 700	660 - 710	680 - 730
Corrugated case material			
Primary fibre corrugated case material			
Unbleached kraftliner 175 g+	770 - 880	770 - 880	780 - 870
Semi-chemical fluting	620 - 690	620 - 690	650 - 710
White-top kraftliner 140 g	880 - 990	880 - 990	880 - 990
Recycled corrugated case material			
Recycled fluting 100 g	590 - 625	590 - 625	640 - 665
Recycled fluting 90 g	600 - 640	600 - 640	650 - 680
Testliner II	610 - 650	610 - 650	660 - 690
Testliner III	600 - 635	600 - 635	650 - 675
White-top testliner, grade B, 140 g	700 - 770	700 - 770	720 - 770
Cartonboard			
GD II	820 - 950	840 - 970	810 - 940
GC II	1,120 - 1,300	1,120 - 1,330	1,100 - 1,330

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were still doing the rounds, too. Nonetheless, the price reductions have reportedly already spread across most of the market.

Market players think that the pressure on the GC market is unlikely to ease in the next two months. Any prices that have held stable so far might become cheaper in the next few weeks. However, some producers are also hoping to keep a few prices unchanged until the year's end. After all, from mid- or late November, discussions between suppliers and buyers will already be focussing on the terms for 2026, one of them commented. Companies inking quarter-long contracts in October also reckoned with stable prices until the end of 2025.

Calls for price cuts have also become loud on the French recycled cartonboard market of late. A few prices for white-lined chipboard (WLC) had already started to decline in September on the French market, but this was the exception. In October, manufacturers granted price cuts of €20/t or sometimes up to €30/t for GD 2 in many cases. Some insiders also reported instances of still unchanged prices. That being said, the majority of EUWID contacts mentioned a broad trend of falling prices across the market.

Sources highlighted inadequate demand as the reason for this turn of events. Although demand was relatively stable or slightly stronger than in mid-September, it remains subdued on the whole, market sentiment suggests. "The market is nervous," commented one manufacturer, complaining that some customers were prepared to switch suppliers for as little as a €5 difference in pricing. Converters, too, are under pressure from their customers to cut their sales prices.

While the trend in recovered paper prices played less of a role in October and was often not regarded as the main driver for falling GD prices, it was still playing a role and was an argument that converters raised in negotiations. In March, the steep rise in recovered paper costs had sent GD board prices higher, albeit to a lesser extent. Recovered paper prices then receded a short time later, without cartonboard prices following suit. Quite a few buyers thus felt that there was room for correction here, even though producers countered that recovered paper prices have been surprisingly stable in France of late and remain quite high overall.

Following the recent price reductions for GD, sources generally do not expect further changes between now and the year's end, apart from stragglers. It was not unusual for prices to be set in stone until the year's end. However, one market player noted that the market remained under pressure, adding that additional price adjustments could not be entirely ruled out in the months ahead. Nonetheless, keeping prices stable – also for 2026 – was the declared objective, another manufacturer commented. The difficulties faced by the Italian cartonboard producer FM Cartiere and the temporary closure of its mill have driven home to many just how serious the situation is. □