EUWID Price Watch France
September 2025

Prices in € per tonne free delivered unless otherwise stated	September 2025	August 2025	September 2024
Fine paper			
Woodfree uncoated			
Copy paper 80 g A4 B grade	890 - 1,000	910 - 1,020	1,030 - 1,170
Copy paper 80 g A4 C grade	840 - 950	860 - 970	980 - 1,120
Offset sheets 80 g	920 - 1,020	960 - 1,040	1,040 - 1,140
Offset reels 80 g	850 - 950	890 - 970	980 - 1,100
Woodfree coated			
Sheets, double coated, 100 g	950 - 1,040	960 - 1,060	1,030 - 1,150
Reels, double coated, 100 g	890 - 970	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 - 880	770 - 890	780 - 870
Semi-chemical fluting	620 - 690	630 - 690	650 - 710
White-top kraftliner 140 g	880 - 990	880 - 990	880 - 990
Recycled corrugated case material			
Recycled fluting 100 g	590 - 625	610 - 645	660 - 685
Recycled fluting 90 g	600 - 640	620 - 660	670 - 700
Testliner II	610 - 650	630 - 670	680 - 710
Testliner III	600 - 635	620 - 655	670 - 695
White-top testliner, grade B, 140 g	700 - 770	700 - 770	720 - 770
Cartonboard			
GD II	840 - 970	840 - 970	810 - 940
GC II	1,120 - 1,330	1,140 - 1,330	1,100 - 1,330

and magazine circulation is declining. Retail demand for paper for advertising materials stabilised last year after the slump in 2023, but has been on a downward trend again in the first half of this year. Some supermarket chains, such as Carrefour, have stopped sending advertising flyers to households and now only distribute advertising material at their stores or have digitised it completely. As a result, paper demand in this market segment fell by a good 10 per cent in the first half of this year compared with the previous year. Even if we only consider those retail chains that have maintained their printed advertising in the same way, the market is shrinking by several per cent. There has also been a downgrading of paper types and, above all, the use of increasingly lighter grammages.

Prices for corrugated case material continue to fall

In September, prices for corrugated case material in France continued to decline for some grades. Following the price reductions in August, there were further downward adjustments of mostly €20/t for brown recycled grades. In cases where prices had only fallen by €20/t in August, the reduction could be as much as €30, bringing the total price reduction over the past three months to €90/t.

Prices for brown kraftliner also continued to fall in some cases in September, depending on price developments in August. Here, the price reductions in September and August add up to €30/t, sometimes more.

Prices for semi-chemical pulp fluting are showing a downward trend, too, with price declines of up to €20/t seen in the past two months.

Prices for white-top testliner and white-top kraftliner are reported to be largely unchanged.

Paper manufacturers are currently making efforts to reverse the price trend. Heinzel announced at the beginning of September that prices for its entire range of corrugated case material would increase by €100/t from 1 October. In addition, other paper manufacturers have made similar price demands, in some cases only for certain regional markets.

The corrugated board market in France did not pick up in September as much as paper and corrugated board manufacturers would have liked. Although demand for corrugated board products has grown slightly by around 1-1.5 per cent so far this year, paper and corrugated board manufacturers say this is not enough to absorb the available capacity for recycled containerboard. Three additional machines have recently been put into operation in France (Norske Skog Golbey), Austria (Heinzel Lakkirchen) and Italy (Mondi Duino). Market insiders report that the additional supply is noticeable on the market. Although there are opportunities to sell additional paper coming onto the market through exports, these are limited.

Paper inventories have also risen further recently as a result of existing overcapacity and li-

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