EUWID Price Watch Germany

August 2025

Prices in € per tonne free delivered unless otherwise stated	August 2025	July 2025	August 2024
Fine paper			
Woodfree uncoated			
A4 C-grade, branded paper	840 - 920	850 - 940	980 - 1,030
A4 C-grade, non-branded paper	810 - 870	820 - 890	940 - 980
Offset sheets 80 g	950 - 1,040	950 - 1,050	1,050 - 1,130
Offset reels 80 g	910 - 970	910 - 980	980 - 1,030
Woodfree coated			
Sheets, double coated, 100 g	950 - 1,030	950 - 1,050	1,040 - 1,140
Reels, double coated, 100 g	900 - 950	900 - 960	980 - 1,030
Publication paper			
Newsprint 45 g (coldset)	585 - 610	585 - 610	600 - 630
Newsprint 42.5 g (coldset)	595 - 620	595 - 620	610 - 640
Newsprint 45 g (heatset)	580 - 610	580 - 610	600 - 630
LWC offset 60 g	770 - 805	770 - 805	780 - 820
LWC rotogravure 60 g	800 - 820	800 - 820	800 - 835
SC offset 56 g (A)	670 - 695	670 - 695	680 - 710
SC rotogravure 56 g (A)	670 - 695	670 - 695	680 - 710
Corrugated case material			
Primary fibre corrugated case material			
Unbleached kraftliner from Scandinavia 175 g	870 - 910	890 - 930	870 - 890
Semi-chemical corrugated medium[1]	795 - 1,020	795 - 1,020	775 - 1,000
White-top kraftliner 140 g	1,090 - 1,170	1,090 - 1,170	1,040 - 1,150
Recycled corrugated case material			
Schrenz	590 - 600	610 - 630	630 - 650
Wellenstoff	620 - 630	640 - 660	660 - 680
Testliner II	650 - 660	670 - 690	690 - 710
Testliner III	630 - 640	650 - 670	670 - 690
White-top testliner, coated	930 - 950	930 - 970	910 - 950
White-top testliner, 140 g, ISO 70-75	810 - 825	830 - 845	790 - 805
Cartonboard			
Unlined chipboard	815 - 855	815 - 855	815 - 875
GD II	890 - 960	890 - 960	850 - 960
GC II	1,220 - 1,255	1,240 - 1,275	1,210 - 1,235

[1] Prices at the upper end of the range represent Scandinavian primary fibre grades, lower-end prices are quoted for other European grades.

 EUWID assumes no liability for the accuracy of pricing information.

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ed 194,000 t of uncoated woodfree paper and 327,000 t of coated woodfree paper from Europe last year.

Brown kraftliner costs less, white-top kraftliner prices remain generally unchanged

The August holiday period is also translating into seasonally weaker demand for kraftliner. In the wake of price cuts for brown recycled corrugated case material (RCCM), brown kraftliner also became €20/t cheaper in most cases. Industry representatives stress, however, that market conditions remain significantly more stable than for recovered paper-based grades. Observers said that prices for brown kraftliner had been cut because of much lower raw material prices, and because the gap to recycled corrugated case material prices had simply become too wide. After the latest reduction in RCCM prices, brown kraftliner producers felt compelled to follow suit, even though the substitutional potential between the grades had been largely exhausted in recent years.

Suppliers now expect to see some relief from upcoming maintenance stoppages scheduled at many a kraftliner mill in Europe. For now, significant volumes are being made to put on stock.

Signs of an economic rebound with rising packaging demand remain scarce. Most EUWID contacts are far from optimistic about business prospects in the usually stronger autumn months.

White-top kraftliner prices largely held steady in August. That being said, EUWID sources anticipate that manufacturers will follow with price reductions given the downward trend in white-top testliner prices. Insiders also raised the price gap as an issue in the white containerboard segment. EUWID sources estimate that their demand for white-top kraftliner has fallen by at least 10 per cent over the past five years.

This downturn in consumption is attributed to consumers' preference for unbleached packaging grades due to sustainability reasons, and the fact that white-top kraftliner was simply too expensive. Similar trends were evident for white-top testliner, too, with converters reporting that they had switched significant amounts to brown grades.

Balanced market conditions are also being reported for the niche product of semi-chemical fluting, with no changes in price. □