EUWID Price Watch Germany

July 2025

Prices in € per tonne free delivered unless otherwise stated	July 2025	June 2025	July 2024
Fine paper			
Woodfree uncoated			
A4 C-grade, branded paper	850 - 940	860 - 950	980 - 1,030
A4 C-grade, non-branded paper	820 - 890	820 - 900	940 - 980
Offset sheets 80 g	950 - 1,050	980 - 1,080	1,050 - 1,130
Offset reels 80 g	910 - 980	920 - 990	980 - 1,030
Woodfree coated			
Sheets, double coated, 100 g	950 - 1,050	980 - 1,080	1,040 - 1,140
Reels, double coated, 100 g	900 - 960	900 - 970	980 - 1,030
Publication paper			
Newsprint 45 g (coldset)	585 - 610	600 - 625	600 - 630
Newsprint 42.5 g (coldset)	595 - 620	610 - 635	610 - 640
Newsprint 45 g (heatset)	580 - 610	600 - 625	600 - 630
LWC offset 60 g	770 - 805	780 - 810	780 - 815
LWC rotogravure 60 g	800 - 820	800 - 820	795 - 825
SC offset 56 g (A)	670 - 695	680 - 700	680 - 710
SC rotogravure 56 g (A)	670 - 695	680 - 700	680 - 710
Corrugated case material			
Primary fibre corrugated case material			
Unbleached kraftliner from Scandinavia 175 g	890 - 930	890 - 930	830 - 850
Semi-chemical corrugated medium[1]	795 - 1,020	775 - 1,020	775 - 980
White-top kraftliner 140 g	1,090 - 1,170	1,090 - 1,170	1,040 - 1,110
Recycled corrugated case material			
Schrenz	610 - 630	650 - 670	610 - 650
Wellenstoff	640 - 660	680 - 700	640 - 680
Testliner II	670 - 690	710 - 730	670 - 710
Testliner III	650 - 670	690 - 710	650 - 690
White-top testliner, coated	930 - 970	930 - 970	910 - 950
White-top testliner, 140 g, ISO 70-75	830 - 845	830 - 845	790 - 805
Cartonboard			
Unlined chipboard	815 - 855	815 - 855	815 - 875
GD II	890 - 960	890 - 960	850 - 960
GC II	1,240 - 1,275	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.

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existential challenges, they add. Yet, some players believe the alarm and complaints about some topics, such as the tariff debate, are exaggerated. Others counter that even if the EU has (apparently) reached an agreement with the USA in the tariff conflict, there is still some degree of uncertainty and sales and margins in the export business are at stake.

Moreover, players complain about increased activity in the European import business. Despite significant paper volumes coming from Asia onto the European market, industry experts believe this is not the cause of the price erosion in recent months. While the uptick in supply from Southeast Asia is compounding the problems for European producers and merchants, respondents emphasise that it is only one of many factors at play. Deliveries from Southeast Asia, especially of copy paper and sheets, have become a fixture on the market in recent weeks. Market experts report noticeable volumes coming into Europe and Germany.

It remains to be seen how successfully German and Central European paper merchants can reposition themselves in the evolving market. Signs of restructuring in this sector are apparent, not least through the formation of various partnerships with paper producers. Insiders report that certain merchants are focusing on individual paper producers in particular segments. One recent example is the deal signed between paper merchant Ovol Papier Deutschland and fine paper producer myCordenons, part of Italy's Fedrigoni Group. Under this partnership, Ovol becomes the exclusive distributor of certain myCordenons products in Germany and Austria.

July brings some price cuts for brown kraftliner

The kraftliner market in Germany is feeling the summer slump. Order intake is subdued and customers are only ordering the volumes to meet immediate needs. Kraftliner is readily available, according to converters, who do not expect any major changes in the situation until September. From that point, maintenance downtime planned by various producers could reduce supply and lead to noticeably longer delivery times. However, some players are producing to stock during the low-demand summer months.

The corrugated industry is hoping that order intake will pick up as of mid-September. As is usual in summer, shifts are being cancelled, but this year the cancellations are often lasting for a longer period of time.