

EUWID Price Watch Italy

July 2025

Prices in € per tonne free delivered unless otherwise stated	July 2025	June 2025	July 2024
Fine paper			
Woodfree uncoated			
Copy paper 80 g A4 B grade	920 - 1,000	950 - 1,030	1,040 - 1,120
Copy paper 80 g A4 C grade	820 - 920	840 - 950	960 - 1,040
Offset sheets 80 g	920 - 1,000	950 - 1,030	1,030 - 1,120
Offset reels 80 g	820 - 920	860 - 950	940 - 1,040
Woodfree coated			
Sheets, double coated, 100 g	950 - 1,050	970 - 1,080	1,040 - 1,150
Reels, double coated, 100 g	860 - 950	880 - 970	950 - 1,040
Publication paper			
Standard newsprint 45 g	580 - 610	590 - 620	600 - 635
Standard newsprint 42 g	590 - 620	600 - 630	610 - 645
Improved newsprint ISO 68, 52 g	610 - 630	620 - 640	630 - 655
LWC offset 60 g	730 - 770	740 - 780	750 - 800
SC offset 56 g (A)	630 - 660	640 - 670	650 - 690
SC offset 52 g (A)	640 - 670	650 - 680	660 - 700
Corrugated case material			
Primary fibre corrugated case material			
Unbleached kraftliner 175 g+, European quality	660 - 690	660 - 700	640 - 660
White-top kraftliner 140 g, European quality	800 - 850	800 - 860	790 - 830
Recycled corrugated case material			
Recycled fluting, European quality	375 - 400	395 - 420	380 - 410
Testliner II, European quality	415 - 430	435 - 450	410 - 440
Testliner III, European quality	385 - 410	405 - 430	390 - 420
White-top testliner, grade C, 140 g, European quality	510 - 540	520 - 550	530 - 560
Medium, Italian quality	330 - 340	345 - 360	330 - 350
Testliner IV, Italian quality	340 - 350	355 - 370	340 - 360
Cartonboard			
GD II	600 - 670	620 - 690	630 - 710
GD III	560 - 610	580 - 630	590 - 630
GC II	970 - 1,120	1,000 - 1,150	1,000 - 1,120

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second quarter. Only suppliers that were already offering particularly low prices were spared.

The paper industry's customers were rarely satisfied with the outcome of price talks, either. At times, bigger price cuts appeared possible, and they would have gladly secured a mark-down of €20-30/t for newsprint and magazine paper deliveries in the third quarter. One buyer stressed to EUWID that prices of this kind, e.g. around €580/t free delivered for standard newsprint 42 g (or even 40 g), had been available on the market for some time and certainly deserved to be reflected in list prices. When all was said and done, though, buyers mostly had to settle for smaller price adjustments.

According to a few insiders, there was still quite a bit of room for savings. One customer reported having managed to negotiate its suppliers down to an almost uniform level, and, starting in July, was paying €590-600/t for 42 g standard newsprint. Another printing company said that it was only buying newsprint at prices below €600/t free de-

livered. Yet another buyer mentioned working with monthly prices, wherever possible, in the hope of securing additional reductions from September onwards.

Persistently poor capacity utilisation is actually hurting paper mills more than new, lower prices. This is especially apparent for magazine paper, with coated magazine paper producers criticising a lack of contract business. Sources lamented a lack of continuity and planning reliability because orders and sales prices are highly project-specific and are thus being renegotiated again and again. Yet newsprint and uncoated magazine paper manufacturers also had to keep scrambling for new orders just to keep capacity utilisation at reasonable levels.

The bankruptcy of German manufacturer Kabel Premium in the first quarter of this year has done little to curb the supply in the coated magazine paper market. Now, Finnish producer UPM has announced plans to shut down LWC production at

its Kaukas mill by the end of the year, removing 300,000 tpy of capacity from the market. UPM is also planning to close its Ettringen mill, which has a production capacity of 270,000 tpy of SC paper and improved newsprint in the second half of this year.

No further announcements of capacity reduction projects had been made in Europe as July came to a close. However, EUWID sources generally do not rule out additional measures to be announced by the year's end.

Even though demand is contracting on the whole, Canadian newsprint is becoming more readily available in Italy and across Europe. This primary fibre-based paper is offered in basis weights below 40 g/m², which could offer significant cost savings for paper buyers. Imports into Italy had already doubled to reach roughly 27,000 t between 2023 and 2024. According to Eurostat, the first five months of 2025 saw another 40 per cent increase in imports compared to the same period last year.

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