

EUWID Price Watch Italy

March 2026

Prices in € per tonne free delivered unless otherwise stated	March 2026	February 2026	March 2025
Fine paper			
Woodfree uncoated			
Copy paper 80 g A4 B grade	880 - 960	880 - 960	970 - 1,050
Copy paper 80 g A4 C grade	760 - 860	760 - 860	870 - 970
Offset sheets 80 g	870 - 940	870 - 940	960 - 1,050
Offset reels 80 g	770 - 860	770 - 860	870 - 970
Woodfree coated			
Sheets, double coated, 100 g	910 - 990	910 - 990	980 - 1,100
Reels, double coated, 100 g	820 - 900	820 - 900	890 - 990
Publication paper			
Standard newsprint 45 g	565 - 590	565 - 590	595 - 620
Standard newsprint 42 g	575 - 600	575 - 600	605 - 630
Improved newsprint ISO 68, 52 g	590 - 610	590 - 610	620 - 640
LWC offset 60 g	720 - 750	720 - 750	740 - 780
SC offset 56 g (A)	620 - 640	620 - 640	640 - 670
SC offset 52 g (A)	630 - 650	630 - 650	650 - 680
Corrugated case material			
Primary fibre corrugated case material			
Unbleached kraftliner 175 g+, European quality	620 - 650	620 - 650	630 - 650
White-top kraftliner 140 g, European quality	770 - 820	770 - 820	790 - 830
Recycled corrugated case material			
Recycled fluting, European quality	340 - 350	340 - 350	400 - 415
Testliner II, European quality	380 - 390	380 - 390	440 - 450
Testliner III, European quality	350 - 360	350 - 360	410 - 425
White-top testliner, grade C, 140 g, European quality	490 - 510	490 - 510	530 - 550
Medium, Italian quality	290 - 300	290 - 300	350 - 360
Testliner IV, Italian quality	300 - 310	300 - 310	360 - 370
Cartonboard			
GD II	560 - 630	560 - 630	600 - 670
GD III	530 - 570	530 - 570	560 - 600
GC II	930 - 1,080	930 - 1,080	1,000 - 1,150

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mentioned a marked pick-up in demand in March and hope to turn this to their advantage. However, in their view, it remains difficult to judge how much of this additional demand reflects customer stock-building and how much is genuine consumption at the start of the new kraftliner season.

Several converters told EUWID that unbleached kraftliner prices had not come under noticeable pressure in the penultimate and final week of March. They said they did not expect to pay any surcharges to their suppliers, at least for April. Kraftliner mills are generally running on biomass rather than gas, they added, and kraftliner prices are comparatively high. Building a price increase on the same arguments as those for recycled corrugated case material, therefore, makes little sense and is unlikely to succeed, one buyer pointed out.

The success of price talks for unbleached kraftliner in Italy will largely depend on how prices for imports from the US and Brazil develop. In March, EUWID received conflicting reports on how US

suppliers are proceeding in both their home market and Italy. Following a February price cut in the US, a few producers announced a March increase of around \$70/t. A few EUWID contacts reported that US producers had only limited – if any – success in pushing through the price hikes on the domestic market.

So far this year, US manufacturers have not raised their prices for shipments to Italy, either. Prices were generally stable or even trended slightly lower because US suppliers benefited from the strong euro when collecting orders in Europe for production in January and February. This meant that US kraftliner was available in Italian ports at prices starting at €570/t CIF in March, with similar sales prices expected in April as well.

Sources told EUWID that unbleached kraftliner from Brazil could be purchased for prices starting at €560/t in March. Kraftliner made in Brazil is readily available, and customers are increasingly using supply to shore up supply in the face of a potential downturn in US imports.

Changing conditions on Italy's cartonboard market, but price hike notices are still rare

Italy's market for white-lined chipboard has been essentially weak since the start of the year, with little significant momentum from demand. Sources told EUWID that the market was experiencing ample supply, with significant surplus capacity in the GD board segment and typically only modestly busy mills. As has been the case since the middle of last year, Italy has effectively been a sustained buyers' market in the first quarter, with all the usual consequences of such a constellation: intense competition and low prices.

In light of this situation, a few GD suppliers were reportedly still willing to trim their prices for March deliveries slightly in talks with customers in late February. Price cuts were in the region of €10-20/t and served to drum up additional orders and capture market share from competitors. In this vein, market players also reported that a few

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