

EUWID Price Watch Italy

May 2026

| Prices in € per tonne free delivered unless otherwise stated | May 2026 | April 2026 | May 2025 |
|--|---------------------------|-------------|---------------|
| Fine paper | | | |
| Woodfree uncoated | | | |
| Copy paper 80 g A4 B grade | 930 - 1,000 | 910 - 980 | 960 - 1,050 |
| Copy paper 80 g A4 C grade | 810 - 900 | 790 - 880 | 850 - 970 |
| Offset sheets 80 g | 910 - 990 | 900 - 970 | 960 - 1,050 |
| Offset reels 80 g | 820 - 900 | 800 - 880 | 870 - 970 |
| Woodfree coated | | | |
| Sheets, double coated, 100 g | 960 - 1,050 | 950 - 1,040 | 980 - 1,100 |
| Reels, double coated, 100 g | 880 - 950 | 860 - 950 | 890 - 990 |
| Publication paper | | | |
| Standard newsprint 45 g | 580 - 615 | 565 - 615 | 590 - 620 |
| Standard newsprint 42 g | 590 - 625 | 575 - 625 | 600 - 630 |
| Improved newsprint ISO 68, 52 g | 600 - 635 | 590 - 635 | 620 - 640 |
| LWC offset 60 g | 740 - 790 | 720 - 790 | 740 - 780 |
| SC offset 56 g (A) | 630 - 660 | 620 - 660 | 640 - 670 |
| SC offset 52 g (A) | 640 - 670 | 630 - 670 | 650 - 680 |
| Corrugated case material | | | |
| Primary fibre corrugated case material | | | |
| Unbleached kraftliner 175 g+, European quality | 660 - 710 | 620 - 650 | 660 - 700 |
| White-top kraftliner 140 g, European quality | 800 - 860 | 770 - 820 | 800 - 860 |
| Recycled corrugated case material | | | |
| Recycled fluting, European quality | 415 - 430 | 400 - 410 | 410 - 430 |
| Testliner II, European quality | 455 - 470 | 440 - 450 | 450 - 465 |
| Testliner III, European quality | 425 - 440 | 410 - 420 | 420 - 440 |
| White-top testliner, grade C, 140 g, European quality | 530 - 550 | 530 - 550 | 530 - 560 |
| Medium, Italian quality | 365 - 380 | 350 - 360 | 360 - 370 |
| Testliner IV, Italian quality | 375 - 390 | 360 - 370 | 370 - 380 |
| Cartonboard | | | |
| GD II | 590 - 670 | 560 - 650 | 620 - 690 |
| GD III | 570 - 610 | 530 - 590 | 580 - 630 |
| GC II | 930 - 1,100 ¹⁾ | 930 - 1,080 | 1,000 - 1,150 |

¹⁾ Price movement reflects temporary surcharges of up to €30/t.

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The implementation of higher prices on Italy's folding boxboard (FBB) market has resulted in a mixed pricing landscape for GC board as the middle of the second quarter arrived. So far, only one FBB manufacturer has opted for regular price notices with the usual lead time and is aiming to increase prices for deliveries starting in July. In the majority of cases, European GC board producers attempted to lift their selling prices as early as April or May via cost-related temporary surcharges. This step was originally designed to ensure that prices in existing contracts, which fix terms and prices until the end of June or, more rarely, the year's end, could be adjusted upward.

On the other hand, efforts to raise GC prices in Italy have met with limited success to date. Temporary surcharges are late to take hold in Italy and, at roughly €30-35/t, are also proving to be smaller than suppliers envisaged. A few buyers are also categorically ruling out the possibility of

out-of-cycle price hikes. Even where it would be contractually possible, suppliers are thus encountering strong resistance. Business with small and medium-sized buyers is turning out to be especially challenging because many of them can turn to alternative suppliers. The abundant supply of imports from Asia continued to leave its mark in this segment, too, sources noted.

Insiders described demand for GC as adequate to, in some cases, satisfactory up to the start of price talks in April. Since a few customers brought forward orders in advance of the hike, this resulted in well-filled order books for a brief time. However, order backlogs have been dwindling again since the start of May at the latest. One EUWID source pointed out that, without the uptick in imports, sales statistics for the Italian market would be much more negative, which also means that European suppliers are losing market share in Italy.

The approach taken by suppliers to charging more on Italy's market for white-lined chipboard (WLC) appears to be somewhat more robust. The majority of WLC manufacturers set out their position in good time and clearly communicated their price plans for second-quarter deliveries.

Initial price rises for GD 2 and GD 3 took hold for deliveries from mid-April onwards. In most other cases, customers did not have to dig deeper into their pockets until deliveries in May. At the end of the day, market players from Italy said that prices had edged €30-40/t higher, although sources mentioned smaller hikes in a few instances. That being said, higher prices are widely seen as established across large swaths of the market.

Manufacturers said that the higher GD prices will only just allow recycled board mills to keep pace with the increases in energy and transport

► continued on page 10