

EUWID Price Watch Germany

June 2025

Prices in € per tonne free delivered
unless otherwise stated

	June 2025	May 2025	June 2024
Fine paper			
Woodfree uncoated			
A4 C-grade, branded paper	860 - 950	880 - 970	980 - 1,030
A4 C-grade, non-branded paper	820 - 900	850 - 930	940 - 980
Offset sheets 80 g	980 - 1,080	1,000 - 1,110	1,050 - 1,130
Offset reels 80 g	920 - 990	940 - 1,010	980 - 1,030
Woodfree coated			
Sheets, double coated, 100 g	980 - 1,080	1,000 - 1,110	1,040 - 1,140
Reels, double coated, 100 g	900 - 970	920 - 990	980 - 1,030
Publication paper			
Newsprint 45 g (coldset)	600 - 625	600 - 625	570 - 610
Newsprint 42.5 g (coldset)	610 - 635	610 - 635	580 - 620
Newsprint 45 g (heatset)	600 - 625	600 - 625	570 - 610
LWC offset 60 g	780 - 810	780 - 810	780 - 820
LWC rotogravure 60 g	800 - 820	800 - 820	800 - 835
SC offset 56 g (A)	680 - 700	680 - 700	680 - 710
SC rotogravure 56 g (A)	680 - 700	680 - 700	680 - 710
Corrugated case material			
Primary fibre corrugated case material			
Unbleached kraftliner from Scandinavia 175 g	890 - 930	870 - 930	830 - 850
Semi-chemical corrugated medium ¹⁾	775 - 1,020	775 - 1,020	755 - 980
White-top kraftliner 140 g	1,090 - 1,170	1,090 - 1,170	1,040 - 1,110
Recycled corrugated case material			
Schrenz	650 - 670	650 - 670	590 - 610
Wellenstoff	680 - 700	680 - 700	620 - 640
Testliner II	710 - 730	710 - 730	650 - 670
Testliner III	690 - 710	690 - 710	630 - 650
White-top testliner, coated	930 - 970	930 - 970	910 - 950
White-top testliner, 140 g, ISO 70-75	830 - 845 *	830 - 885	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

* In retrospective, prices remained unchanged in May and June.

¹⁾ Prices at the upper end of the range represent Scandinavian primary fibre grades, lower-end prices are quoted for other European grades.© 2025 EUWID Europäischer Wirtschaftsdienst GmbH
All rights reserved

EUWID assumes no liability for the accuracy of pricing information.

► continued from page 7

Acceptable first quarter but steep downward trend on corrugated sheets market since April

Based on the developments in the first quarter, companies in the corrugated sheets industry had a sense of hope that the situation could be improving. Demand at the time remained stable with slight growth. But from the beginning of the second quarter, the positive expectations on the market quickly evaporated, with some EUWID respondents describing business in April as catastrophic.

One market participant explained optimism now means hoping that things will not deteriorate further. The month of May also did not bring any turnaround in the demand trend. The mild

euphoria in the wake of the election of a new German government was soon replaced by uncertainty due to US tariff policy.

It is still too soon to get a good picture of the market in June, especially since there are usually ups and downs over the course of the month – sometimes the market is better at beginning of the month, sometimes at the end. There are players who report having a good June, in particular those with a strong position in the beverage sector, as well as companies that expect the current month to be weak. For some companies, June is an important month before school lets out and the summer holiday season begins. When June is weak, the summer lull is starting far too early, they say.

At the same time, prices for corrugated case material were ticking higher again. In a market with weak demand, it is almost impossible to negotiate with customers shortly before summer about passing along higher costs yet again, EUWID was told. Moreover, long-time industry experts had suspected that the price step in May, which was once more based on the upward price trend for RCP, might prove unsustainable.

In June, the price trend reversal for RCP is quite evident, so calls for the mark-ups to be completely rescinded are growing louder. For individual grades that generally track the price trend of brown recycled corrugated case material grades, some of the price steps scheduled for June were not implemented at all.