EUWID Price Watch Italy
March 2025

Prices in € per tonne free delivered unless otherwise stated	March 2025	February 2025	March 2024
Fine paper			
Woodfree uncoated			
Copy paper 80 g A4 B grade	970 - 1,050	970 - 1,050	1,010 - 1,080
Copy paper 80 g A4 C grade	870 - 970	870 - 970	920 - 1,000
Offset sheets 80 g	960 - 1,050	960 - 1,050	1,000 - 1,080
Offset reels 80 g	870 - 970	870 - 970	920 - 1,000
Woodfree coated			
Sheets, double coated, 100 g	980 - 1,100	980 - 1,100	1,010 - 1,100
Reels, double coated, 100 g	890 - 990	890 - 990	930 - 1,000
Publication paper			
Standard newsprint 45 g	595 - 620	595 - 620	570 - 610
Standard newsprint 42 g	605 - 630	605 - 630	580 - 620
Improved newsprint ISO 68, 52 g	620 - 640	620 - 640	610 - 630
LWC offset 60 g	740 - 780	740 - 780	750 - 800
LWC rotogravure 60 g	770 - 800	770 - 800	790 - 830
SC offset 56 g (A)	640 - 670	640 - 670	650 - 690
SC rotogravure 56 g (A),	650 - 670	650 - 670	660 - 700
SC offset 52 g (A)	650 - 680	650 - 680	660 - 700
SC rotogravure 52 g (A)	660 - 680	660 - 680	670 - 710
Corrugated case material			
Primary fibre corrugated case material			
Unbleached kraftliner 175 g+, European quality	630 - 650	630 - 650	560 - 580
White-top kraftliner 140 g, European quality	790 - 830	790 - 830	740 - 780
Recycled corrugated case material			
Recycled fluting, European quality	400 - 415	350 - 405	320 - 340
Testliner II, European quality	440 - 450	390 - 440	350 - 370
Testliner III, European quality	410 - 425	360 - 415	330 - 350
White-top testliner, grade C, 140 g, European quality	530 - 550	510 - 550	500 - 520
Medium, Italian quality	350 - 360	300 - 345	270 - 280
Testliner IV, Italian quality	360 - 370	310 - 355	280 - 290
Cartonboard			
GD II	600 - 670	600 - 670	600 - 690
GD III	560 - 600	560 - 600	560 - 610
GC II	1,000 - 1,150	1,000 - 1,150	1,000 - 1,120

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quarter. Some contracts had already been signed by the second-last week of March, according to insiders. A publishing house representative reported inking an agreement with his main supplier for the second quarter based on March prices. He explained this would give him the leeway to fend off potential calls for higher prices from other suppliers. Another buyer for an Italian publishing house said he was shifting volumes to low-priced suppliers and forgoing any offers at increased prices. One printing company representative said he was negotiating from month to month and had already secured an unchanged price for April.

Respondents noted there were two major events on the market for publication paper in March. One was the closure of UPM's SC paper and newsprint mill in Ettringen, Germany, and the other was the insolvency of Germany's coated magazine paper producer Kabel Pulp and Paper. There had been numerous rumours about the two companies prior to the news becoming public, so it did not come entirely as a surprise to market players in Italy. Nevertheless, these developments are definitely a topic of conversation.

Paper suppliers and their customers see the situation differently, often to their own advantage. For producers, this news is a clear sign of the difficult situation the European paper industry finds itself in. If the margin situation does not improve in the near future, for example through higher paper prices, further closures will be unavoidable, they say. This, in turn, would have a lasting negative effect on the supply situation in the market.

In the view of buyers, these closures were long overdue. They contend that paper companies are, as usual, slow-footed when it comes to dealing with overcapacities in a shrinking market and these closures will not significantly alter the current supply-demand relationship. In this environment, a price hike for publication papers is inconceivable, they argue. A few customers say it would even be damaging, not only for printing companies but also for the paper industry. Budgets for print projects are already established and print volumes correlate to the paper price, they point out. If paper costs more, fewer pages can be printed and this would have a negative effect on paper demand, asserts one printer.

Smallish increase for RCCM and broadly unchanged prices for kraftliner in March

Producers of recycled corrugated case material were able to push through their demands for

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