

EUWID Price Watch Poland

First quarter 2025

Prices in PLN/€ per tonne free delivered	First quarter 2025	Fourth quarter 2024	First quarter 2024
Graphic paper			
Woodfree uncoated			
Copy paper 80 g A4 C grade in PLN/t	3,675 - 4,075	3,850 - 4,250	4,075 - 4,600
Copy paper 80 g A4 C grade in €/t	879 - 975	901 - 995	949 - 1,071
Offset sheets 80 g in PLN/t	3,975 - 4,275	4,150 - 4,500	4,175 - 4,700
Offset sheets 80 g in €/t	951 - 1,023	972 - 1,019	972 - 1,095
Offset reels 80 g in PLN/t	3,850 - 4,175	4,000 - 4,300	4,050 - 4,500
Offset reels 80 g in €/t	921 - 999	937 - 1,007	943 - 1,048
Woodfree coated			
Sheets, double coated, 100 g in PLN/t	4,275 - 4,600	4,475 - 4,750	4,375 - 4,900
Sheets, double coated, 100 g in €/t	1,023 - 1,101	1,048 - 1,112	1,019 - 1,141
Reels, double coated, 100 g in PLN/t	3,975 - 4,175	4,200 - 4,350	4,075 - 4,500
Reels, double coated, 100 g in €/t	951 - 999	983 - 1,018	949 - 1,048
Publication paper in €/t			
Standard newsprint 45 g	580 - 610	580 - 610	560 - 600
LWC offset 60 g	750 - 800	760 - 800	760 - 800
SC offset 56 g (A)	660 - 710	670 - 710	680 - 720
Packaging paper in €/t			
Primary fibre corrugated case material			
Unbleached kraftliner from Europe 175 g	670 - 780	690 - 790	590 - 650
White-top kraftliner 140 g	900 - 990	920 - 1,010	860 - 950
Recycled corrugated case material			
Recycled fluting	420 - 555	440 - 535	400 - 495
Testliner II	460 - 585	480 - 565	440 - 535
Testliner III	440 - 665	460 - 545	420 - 515
White-top testliner 140 g	540 - 650	560 - 650	510 - 570
Cartonboard in €/t			
GD II	790 - 830	790 - 830	760 - 790
GC II	1,150 - 1,200	1,150 - 1,200	1,090 - 1,200

Exchange rate as of 4 April 2025: 1 PLN = €0.2393

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underpinning this stability. Consumption remains high due to higher incomes and low unemployment rates. Furniture and industrial goods manufacturers are also in better shape. Online shopping is providing persistent demand, as is the construction and renovation business. The Polish automotive industry alone is battling export troubles and reducing its demand for packaging.

Raising prices is currently in the spotlight. As is customarily the case, manufacturers are finding it easier to increase prices for sheets than for packaging. Nonetheless, pressure has intensified noticeably after the latest hikes in paper prices. A much larger number of suppliers than last year are currently attempting to charge more for packaging, insiders noted.

Initial signs of moving GD cartonboard prices but still a great deal of uncertainty

Insiders painted a mixed picture of Poland's cartonboard market between January and March. A few suppliers reported stable or slightly brisker de-

mand, while others described it as more cautious. January was generally considered to be a strong month, underpinned by post-holiday inventory building and potential advance buying before higher GD (white-lined chipboard – WLC) prices were unveiled. Business activity cooled slightly in February before improving slightly in March, depending on the supplier in question. Poland remains a stable market by European standards but is still mired in uncertainty. Orders were placed late, with customers clearly cautious.

GC board (folding boxboard – FBB) prices remained largely unchanged in the first quarter. Standard GC 2 grades stayed at December's prices. Major buyers alone managed to institute price cuts of around €20/t, putting prices below the €1,100/t mark. Universal price adjustments were not reported.

A few market players anticipate that GC prices will come under greater pressure in the second half of the year, primarily due to the addition of capacity at a new folding boxboard machine in Oulu.

The trajectory in GD board prices was a little livelier. A lack of momentum on the demand side initially thwarted mark-ups slated for the start of the year. It took until March for the first increases to take hold, typically in the region of €20 to €30/t. Merchants report that these higher prices are expected to take hold more broadly from April onwards. Suppliers are underscoring higher costs and persistently slim margins. At the same time, demand for cartonboard and folding boxes in Poland remains weak, which is thwarting larger price hikes. Many market players thus view the current increases as a much-needed correction.

Lead times for GD are two to three weeks long. Machines are operating at slightly better capacity utilisation, although it remains unclear whether this is due to genuine demand or advance buying.

The mood within the cartonboard market was downbeat in early April. Sources mentioned initial signs of a recovery, but uncertainty about supply and demand remains. □