EUWID Price Watch UK
June 2025

Prices in £ per tonne free delivered unless otherwise stated	June 2025 £	June 2025 €*	May 2025 £	June 2024 £
Fine paper				
Woodfree uncoated				
Copy paper 80 g A4 B grade	830 - 870	971 - 1,018	830 - 890	890 - 1,000
Copy paper 80 g A4 C grade	790 - 840	924 - 983	790 - 860	860 - 970
Offset sheets 80 g	880 - 920	1,030 - 1,076	880 - 920	920 - 1,010
Offset reels 80 g	800 - 880	936 - 1,030	800 - 880	860 - 970
Woodfree coated				
Sheets, double coated, 115 g	890 - 940	1,041 - 1,100	890 - 940	940 - 1,010
Reels, double coated, 100 g	800 - 860	936 - 1,006	800 - 860	860 - 950
Publication paper				
Standard newsprint 45 g	480 - 510	562 - 597	480 - 510	440 - 490
Standard newsprint 42.5 g	490 - 520	573 - 608	490 - 520	450 - 500
Standard newsprint 40 g	500 - 530	585 - 620	500 - 530	460 - 510
Improved newsprint 52 g, ISO 68	530 - 560	620 - 655	530 - 560	490 - 530
LWC offset 60 g	660 - 700	772 - 819	660 - 700	680 - 730
SC offset 56 g (A)	580 - 610	679 - 714	580 - 610	600 - 640
Corrugated case material				
Primary fibre corrugated case material				
Unbleached kraftliner 175 g+, European quality	720 - 770	842 - 901	720 - 755	655 - 700
White-top kraftliner 140 g, European quality	805 - 875	942 - 1,024	785 - 875	760 - 835
Recycled corrugated case material				
Recycled fluting 100 g	555 - 605	649 - 708	555 - 605	530 - 560
Recycled fluting 90 g	555 - 610	649 - 714	555 - 610	530 - 565
Recycled fluting 85 g	565 - 620	661 - 725	565 - 620	540 - 575
Testliner II	575 - 625	673 - 731	575 - 625	550 - 580
Testliner III	555 - 605	649 - 708	555 - 605	530 - 560
White-top testliner, grade B, 140 g	660 - 720	772 - 842	640 - 700	640 - 700
Cartonboard				
GD II	620 - 715	725 - 837	620 - 715	650 - 750
GC II	930 - 1,010	1,088 - 1,182	930 - 1,010	900 - 1,010

* Exchange rate as of 20 June 2025: £1 = €1.17

EUWID assumes no liability for the accuracy of pricing information.

ted consumption, for instance through increased leisure activities such as day trips and barbecues.

However, the market continues to be marked by significant volatility. Strong weeks are repeatedly followed by unexpectedly subdued periods, participants report. These fluctuations are not uniform across the market but occur at different times depending on the company, product segment or region. Some suppliers who observed a marked drop in demand in June are already voicing concerns that this could mark the beginning of a more prolonged summer lull.

According to industry representatives, the increase in social security contributions and the rise in the minimum wage, both in effect since April, are weighing on the British economy. These measures have had a noticeably negative impact, market observers say. Additional uncertainty stems from geopolitical tensions, including the risk of escalation in the Middle East, and an unclear global trade environment amid discussions of possible new US tariffs.

"Consumers lack both the financial means and the confidence to drive domestic demand," one market expert told EUWID. "In this climate, businesses are focusing primarily on risk avoidance."

Against this backdrop, efforts by manufacturers to implement further price increases for corrugated case material have largely stalled. Following the £50/t hike for brown recycled corrugated case material earlier this year, a second step in June failed to materialise. The price adjustment for brown kraftliner was also capped at £40–50/t. In the case of bleached linerboard, implementation proved even more difficult: for white-top testliner, the targeted £40/t increase was not achieved everywhere, but stalled at only £20/t in many cases. For white-top kraftliner, the increase was often limited to £20–30/t, sometimes also only £15/t.

Market participants now believe that the upward trend for paper has come to an end and that no further price increases are likely.

Converters were also ultimately able to push through higher prices for corrugated sheets and packaging, even though the British market had recently been characterised by overcapacity. According to most reports, prices for sheets rose by 5 to 7 per cent, and in some cases even more. For packaging, increases of 3 to 5 per cent were frequently reported, but here too, suppliers are said to have pushed through much larger adjustments.

Suppliers point out that, in addition to higher paper prices, they also had to cope with increases in other input costs. "Many suppliers were reluctant to pass on the higher costs and absorbed some of them at the expense of their own margins," report industry players.

The difficult situation facing the UK corrugated industry is clearly evident in recent events. Inter-

▸ continued on page 4