Cepi aisbl Confederation of European Paper Industries
Avenue Louise 250, box 80, B-1050 Brussels +32 2 627 49 11
cepi.org @CEPI_paper Cepi

PRESS RELEASE

A Slow Drift: New Statistics Report Shows Why Europe's Paper Industry Needs Attention Now

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*Cepi's **2025 Key Statistics Report** highlights a European paper industry that is increasingly exposed to a slow and sustained erosion of its industrial base at a time when its contribution to Europe's circular economy, climate goals, and strategic autonomy remains critical.*

Paper and board **production declined by 1.6% in 2025, reaching 77.4 million tonnes**, reflecting a continued correction after the post-pandemic surge rather than a return to stable growth. Market pulp, a strategic but relatively small proportion of the sector's production, grew by 1.0%. Early signals from 2026 point to continued weakening, with **output already down 2.4% in the first quarter compared to the same period in 2025.**

While overall demand has only slightly eroded, this masks important structural shifts. Production of packaging grades remained stable, despite a significant contraction for cartonboard (-5.4%) while **graphic papers declined sharply (-7.3%).** Overall, excluding graphic papers, European production looked relatively stable in 2025, but still 7.0% below the record levels of 2021.This reflects an intensifying global competition which effects are worsened by a difficult geopolitical context.

The industry has been steadily losing production assets over the past three years, while **import penetration reached a record 7.7% of EU consumption**. **Exports still represent more than 20% of production**, but the EU trade balance has slightly diminished in 2025. Foreign state support and asymmetric market conditions weigh on European industry's competitiveness.

This comes despite the pulp and paper producers' strong sustainability performance. **Pulp and paper producers reduced specific CO_2 emissions by 10.2% in 2025**, continues to operate the world's most effective recycling system, and **sources an all-time high 92% of its wood and nearly all of its recycled material from Europe**, the sector exemplifying Europe's current 'independence moment'.

Overall, data from Cepi's Key Statistics Report 2025 points to a clear policy imperative. Without timely action, Europe risks a gradual loss of industrial capacity in a sector that is essential for fast-moving consumer good markets, logistics, hygiene, and the development of bio-based alternatives to fossil-intensive material which would **allow Europe to tap into a €6.6 trillion global opportunity in emerging bioeconomy markets by 2030.**

[Download Cepi's 2025 Key Statistics Report]

Quotes by Jori Ringman, Cepi Director General

"Cepi calls for a coherent policy response that reinforces trade defence instruments, ensures a predictable and investment-friendly regulatory framework, and strengthens Europe's circular bio-based value chains."

"A slow drift may be less visible than a sudden shock, but its long-term consequences for Europe's industrial resilience, climate leadership, and strategic autonomy are no less significant."

Notes to editor:

For press inquiries to Cepi, please contact

Piotr Pogorzelski, Media Relations Manager,

E: p.pogorzelski@cepi.org

T: +32.4.95.12.67.88

For more information on Industry commitments, please consult:

Cepi's Sustainable Product Pledge

Cepi's Pledge to support the 3 billion trees initiative

The 4evergreen cross-industry alliance

About Cepi:

Cepi is the European association representing the paper industry. We offer a wide range of renewable and recyclable wood-based fibre solutions to EU citizens: from packaging to textile, hygiene and tissue products, printing and graphic papers as well as specialty papers, but also bio-chemicals for food and pharmaceuticals, bio-composites and bioenergy.

We are a responsible industry: 91% of our raw materials are sourced in European Union and certified as sustainable, 90% of the water we use is returned in good condition to the environment. We are the world champion in recycling at the rate of 76.4%. At the forefront of the decarbonisation and industrial transformation of our economy, we embrace digitalisation and bring 18 billion value addition to the European economy and €4.5 billion investments annually. Through its 19 national associations, Cepi gathers 450 companies operating 740 mills across Europe and directly employing more than 176,000 people.

More information about the European pulp and paper sector sustainability performance.