

**British Association of Paper Historians
Thirty-seventh Annual General Meeting
14.00hrs, St Bride Institute, London, 30 Sept. 2026**

CHAIRMAN'S REPORT

A summary of what the Association has achieved over the past twelve months, since our last AGM (held at Rougemont Hotel, Exeter, 19 Sept. 2025), along with a statement on the state of the UK industry.

Events

Since the last AGM we have held a single in-person event being the Spring Meeting of 3 Mar. 2026; thanks to **Barbara Venables** and **Phil Crockett** for its organisation. We had seven speakers and a programme covering (1) an update of the UK paper industry, (2) conservation of a letter book, (3) Japanese papermaking, (4) Conservation at the College of Arms, (5) Design of Wallpaper Printing Blocks (6) Wartime activities at John Dickinson's, and (7) John Hutchinson, a pioneer Australian Papermaker. A more detailed report was published in *The NEWS* 142 – inside Q138 – and to date, no presentations have appeared in the journal.

Publications

Four editions of *The Quarterly* and four of *The NEWS* have been published over the last twelve months. We continue to use paper from the **James Cropper plc** mill in Burneside, supplied by BAPH member **Mark Cropper**; presenting our journal on paper of this quality adds greatly to its prestige and makes it feel what it is – a quality publication – and we thank Mark for his continued generosity.

Turning to the online world, the Web Forum (<http://www.ukpapermills.org.uk/>) is a real credit to its creator and curator **Chris Bennett**, and continues to be the site to visit for information on modern UK paper mills of the last 70-or-so years. Meanwhile, the website (www.baph.org.uk) on which the web forum sits, remains our main portal in the digital world, thanks to **Terry Wells**, who has designed and run it for longer than I care to mention.

UK Industry Overview September 2025 – August 2026

The world continues to see turbulent trading conditions, due in no small part to Donald Trump's erratic behaviour as regards setting of tariffs and military action. There has been downtime and short working in mills across Europe, and the UK has experienced this as well. To date, we have had two mills close: the small (10,000tpy) nonwood pulping plant at Radcliffe, Manchester, run by **Ahlstrom**, and the medium-sized mill operated by **Smurfit Westrock** at Nechells, Birmingham, (capacity around 220,000tpy of corrugated material) which ceased working on 27 July. The closure of this mill was ostensibly down to trading conditions, but it will also have been influenced by pending changes in the UK production side, as noted below.

Packaging

Eren Papers has still not started its massive plant on the former Shotton Mill site in North Wales. No date has yet been set – it could be later this year, or sometime in 2027. But there is no doubt that it is behind schedule! When it does start, the 10.1m corrugated machine was due to be the largest and fastest in the UK, except ...

The week before I started to write this summary, **Palm Paper** in King's Lynn, Norfolk, reported that they planned to cease newsprint manufacture, and transform the machine (10.6m width) to production of corrugating material. This, it is hoped, will start in Q1, 2027 – potentially before Eren gets off the ground.

With two new 10m machines making corrugated, the UK will move quickly from an importer to an exporter of corrugating grades.

How this will affect the other corrugated mills is yet to be seen. **Saica** started in 2012, and makes about 440,000tpy of corrugated on a 7.5m machine; **Smurfit Westrock** Townsend Hook installed a second-

hand machine in 2016, and makes about 250,000tpy, and **DS Smith** has three older machines at Kemsley making about 850,000tpy in total. Will everyone survive, or will there be further closures?

Finally, **Cullen** moulded fibre near Glasgow installed another home-produced manufacturing line.

Turning to corrugated converting, **Eren** acquired **BM Packaging** in Holmfirth; **Saica Pack** upgraded their Hartlepool warehouse; **DS Smith** proposed plans to close their site in Launceston, Cornwall; and **Smurfit Westrock** announced closure of the Chelmsford site (after investing £5.5M there in 2023).

Printing

The decision by **Palm** to withdraw from newsprint removes about 450,000tpy of this grade from the market. A recent survey published by **EMGE** stated that the UK utilised about 340,000t of newsprint in 2025, and this year it is forecast to dip below 300,000t. These figures show that Palm was already having to export a significant quantity of its product, and its reason for withdrawing from a diminishing market now becomes clearer.

The day after Palm announced their decision, **UPM Caledonian** reported their plans to add newsprint production to their portfolio. Their mill makes lightweight coated (LWC) magazine grades, on a base of groundwood pulp produced in-house from Scottish trees. Apparently, they have been trialling manufacture of newsprint recently, which has been tested by some major print groups, and so the mill looks set to take over some of the capacity relinquished by Palm. But the economics will be interesting – Palm used deinked recycled fibre, processed in-house, whereas UPM will use groundwood. When **UPM Shotton** started production of newsprint in 1985 they used TMP produced in-house from English trees, but moved in a handful of years to recycled fibre due to costs. Step forward 40 years, and I don't think the economics have changed much – deinked recycled fibre is still likely to be cheaper than groundwood, so this transition by the Scottish site will be very interesting to watch.

Tissue and Hygiene

As was reported last year, **Kimberly-Clark** closed the doors of its Flint site in Deeside, North Wales during 2025. Not long after, **Northwood** purchased the site, with a view to getting the tissue manufacturing side up and running. Northwood has a track record of purchasing older tissue mills, let go by the bigger multinationals, and turning them around into profitable enterprises, so there is hope they will work their magic again. More interesting will be what they decide to do with the nonwoven manufacturing plant they have purchased on the site, since Northwood has no experience in this area. Will then try their hand, rent or sell?

Elsewhere, **K-C** also started to push installation of hydrogen production at its remaining mills in Northfleet and Barrow. **ICT** started a large tissue machine (nominal capacity 60,000tpy) in Deeside, Wales, in January, with a second tissue machine forecast in the not-too-distant future. **Essity** opened its refurbished Unifibres fibre deinking and recycling facility at Prudhoe Mill in Northumbria. Finally, from what I hear, **Eren** already has a single tissue machine installed at their Shotton Mill site, ready to go, but need to wait for the corrugated machine to get going, before it can operate.

Speciality Papers & Products

Unwasted, a manufacturer of construction boards from recycled board, purchased the former **Sundeala** Mill in Cam, Gloucester, with a view to turning it into their first manufacturing site (capacity 10,000tpy) and R&D facility.

As always, I thank everyone on the BAPH committee for their hard work: **Barbara, Irene, Peter, Phil** and **Rod**. BAPH is a real team effort, so thanks guys!

I conclude by noting that Rod Morley is standing down from this AGM, after a great many years of service, aimed mainly at our various in-person meetings. Thank you Rod for stepping up to the mark and for giving your time and energy to help make these events so memorable.

Daven Chamberlain (31 July 2026)