

## **APPROVED MINUTES**

### **East of England Aggregate Working Party**

Meeting on 12 October 2021 starting at 10am

Venue: Virtual meeting via Microsoft Teams

#### ATTENDEES

Authority Members	
Richard Greaves (RG)	Essex County Council (Chairman)
Phil Dash (PD)	Essex County Council
Emma Chapman (EC)	Hertfordshire County Council
Roy Romans (RR)	Bedfordshire Authorities
Jerry Smith (JS)	Bedfordshire Authorities
Emma Fitch (EF)	Cambridgeshire County Council (also representing Peterborough City Council)
Graham Gunby (GG)	Suffolk County Council
Caroline Jeffery (CJ)	Norfolk County Council
Industry Members	
Mark North (MN)	Mineral Products Association
Peter Huxtable (PH)	British Aggregates Association (BAA)
James Carling (JC)	Cemex
Alan Everard (AE)	Tarmac / MPA
Kirsten Hannaford-Hill (KHH)	Aggregate Industries / MPA
Maisie Millard (MM)	Aggregate Industries / MPA (shadow)
Angela Watts (AW)	Brett Aggregates / MPA
Others	
Julia Webberley (JW)	EEAWP Secretariat
Dave Pitt (DP)	EEAWP Secretariat
Vineeta Sharma (VS)	DLUHC
Nick Everington (NE)	The Crown Estate
Corinna Dietz (CD)	Marine Management Organisation
Apologies	
Richard Drake	Norfolk County Council
Chris Stanek	Hertfordshire County Council
Alan Jones	Peterborough City Council (represented by EF)
Georgie Sutton	Marine Management Organisation
Mark Page	Hansons / MPA
Peter Lemon	Midd Aggs / BAA
Simon Smith	Longwater
Mark Kelly	Cemex / MPA
Shaun Denny	Breedon Aggregates / MPA / BAA
Helen Wass	Cambridgeshire County Council
Tom Forbes-Cox	Cemex

Item No.	Subject	Owner
1	<b>Welcome, Introductions and Apologies</b>	<b>RG / JW</b>
	<p>RG welcomed everyone to the meeting and everyone introduced themselves. JW ran through a list of apologies. Apologies are as set out on the previous sheet. RG advised that he needed to leave the meeting at 11am and JW would chair the remainder of the meeting.</p>	
2	<b>Minutes of the last meeting and matters arising</b>	<b>RG / JW</b>
	<p>The minutes of the last meeting were agreed with most matters arising being dealt with under other items. JW confirmed that a host webpage had now been created on the David Jarvis Associates website for publication of EEAWP documents. A link to the webpage was circulated in July and is repeated here:  <a href="https://davidjarvis.biz/east-of-england-awp/">https://davidjarvis.biz/east-of-england-awp/</a>  It is suggested that participating mineral planning authorities include a copy of the link on their websites.</p>	
3	<b>National Planning Issues including matters arising in connection with DLUHC</b>	<b>RG / JW</b>
	<p>JW relayed some headline matters as follows:</p> <ul style="list-style-type: none"> <li>• With effect from 20<sup>th</sup> September, MHCLG has been renamed as the Department for Levelling Up, Housing and Communities (DLUHC);</li> <li>• We are pleased to welcome VS to this meeting. VS has joined the Minerals and Waste Planning team at DLUHC and will now be the main point of contact for AWP queries with Aimee Smith and Guy Skelton continuing in the background;</li> <li>• We have just received a template to be used for the annual monitoring report going forwards;</li> <li>• With regards to the secondary aggregate section of the report, DLUHC has not had sufficient capacity to finalise the methodology for this. It will look to finalise an approach in next year's annual monitoring report. In the meantime, it is acceptable to continue to adopt the approach previously used in our AWP region;</li> <li>• An update to the National Guidelines is underway but it will not be available in time to inform the upcoming annual report;</li> <li>• Our collective comments on the draft National Terms of Reference have been received and are under consideration.</li> </ul> <p>MN added that Guy Skelton of DLUHC had usefully attended a meeting of the West Midlands AWP at which the need for the National Guidelines to be updated and the AMRI survey to be reintroduced had been reiterated. The MPA has recently met with the DfT (with National Highways and Network Rail) and helpfully been apprised of forecasted</p>	

demand for aggregate for HS2. The DfT has been put in touch with DLUHC which will hopefully act to square the loop on the Ox-Cam Arc project too.

PH endorsed the need for updated National Guidelines and the reintroduction of AMRI and added that it would be useful to see a return of annual meetings of the National Coordinating Group (NCG) which last met in 2017. RG sought transparency in the calculation of the National Guidelines; there was some debate as to whether the last set of Guidelines was based on 10 year average sales figures or not. VS invited input from AWP members into the revision of the National Guidelines and how they are to be calculated. RG thought it sensible for DLUHC to consider calling an NCG meeting to discuss this issue.

Recycled aggregates: RR raised the question of how to assess quantities of recycled and secondary aggregate to ensure consistency. This issue had been discussed at a national meeting of RWTAB chairs following a meeting of the SWAWP. A standardised methodology followed by all authorities would be useful, if possible. Currently, some authorities rely on the EA WDI for this data, whilst others rely on surveys. Surveys can be unreliable and inconsistent. If relying on the WDI, a consistent approach is needed to extract the relevant data as inert waste within the WDI includes metal and other scrap. The WDI is sometimes delayed too, having a knock on effect on LAAs if using this method. It is not clear who should take the lead on addressing this matter: the minerals or the waste industry? RR volunteered to try and identify the most appropriate source of data for this. He will circulate the minutes of the national RWTAB chairs meeting when these are available. JW will seek member comments on RR's note before submitting to VS for review. This matter will be added to the next agenda for discussion at the next meeting.

MN reiterated MPA concern about supply chains, commenting that haulage was an issue before it hit the headlines and that, as well as driver shortages, there is now an 18+ month lead in period for purchasing a new lorry. There is no single minister in charge of minerals as a whole which fall under the ambit of DLUHC and DEFRA amongst others which can result in a lack of communication across departments.

JW had recently attended a follow up meeting to the BGS 2019 survey to discuss lessons learned and recommendations for future surveys. Various issues had been identified with regard to Form A, such as lack of data validation on entry and inability to bulk load data. It was recommended that a bespoke system should be developed well in advance of the next survey which should incorporate data validation rules and allow bulk loading of data. Ideally, the system would be pre-populated by MPAs with the site details to make it easier for operators to complete. MPAs should be able to view the data in order to monitor progress on data submission and to assist in chasing where necessary. Operators should be able to save their return part way through and update it as required. Consequently, MPAs and AWP secretaries are considered to remain critical to the survey process as they are often best

	<p>placed to check returns and resolve issues with data at the time of submission.</p> <p>JW had raised two matters at the meeting:</p> <ol style="list-style-type: none"> <li>a) A request to include within the final published data a table showing aggregate reserves at the sub-regional level. This request was noted; and</li> <li>b) How to deal with disparities between BGS survey data and locally obtained data. In response, the BGS noted that in an ideal world the data presented in AWP monitoring reports would match that presented in AM national collations but where data differs, footnotes are often included to the relevant tables in the AWP/LAA report to note the reason(s) for any differences with the national collation. Aimee Smith of DLUHC confirmed that ideally the data as presented in the AM2019 national collation should be used.</li> </ol>	
4	<b>Annual Monitoring Report 2020 - Update</b>	<b>RG/JW/ MPAs</b>
	<p>JW advised that she had started work on the 2020 annual monitoring report and that she would endeavour to keep it in a format consistent with the previous reports but including the additional data sought by DLUHC in its template. A completed collation form is still awaited from Suffolk. GG advised that Suffolk had not been able to produce its LAA as operator data is still awaited from Cemex / Breedon on two significant sites. JC and MN will follow this up.</p> <p>JW sought advice on how to deal with differences in data obtained via the BGS 2019 survey and surveys carried out locally by mineral planning authorities within the EEAWP. In some cases, the difference in aggregate data is as much as half a million tonnes. DLUHC's preferred approach on this, as noted above, is that the annual report should use BGS data and this approach was endorsed by MN as being the most consistent, even if the data is not completely accurate. MN raised the particular issue as to what would happen in an EiP if two conflicting figures were put forward. However, several mineral planning authorities advised that they would prefer to use their own figures obtained via the local surveys as these are considered to be more accurate. The timing of the BGS survey was also criticised as waiting for data from the BGS resulted in delays to production of LAAs. JW will use the BGS figures in the annual report and these will be used to calculate averages. However, JW will also make sure that locally obtained figures are shown. LAAs which seek to use their own figures should make sure that it is made clear that they are doing so to explain any inconsistencies with the BGS data.</p>	
5	<b>National Guidelines: sub-national apportionment query</b>	<b>All</b>
	<p>JW explained that the 2005-2020 Guidelines indicate that the East of England should provide 8 million tonnes of crushed rock over the guideline period. This sub-divides down to 0.5mt per year (8/16 years). However, the last few annual reports indicate that the annual apportionment is 0.4mt which is split equally between</p>	

	<p>Cambridge/Peterborough and Norfolk. JW had spent some time researching this and her understanding was that the split between Cambridge/Peterborough and Norfolk was 0.3mt:0.2mt which would equate to the guideline figure. EF and CJ endorsed JW's understanding.</p> <p>However, if JW now uses this figure in the 2020 annual report it will make comparison with earlier reports more difficult. RG suggested that we remove reference to the apportionment figure altogether at this stage given the guidelines have now expired.</p>	
6	<b>Consideration of draft LAAs</b>	Various
	<p>Members relayed headline figures from their LAAs as follows:</p> <p><u>Norfolk</u></p> <p>Sand and gravel: Annual production was 1.312 million tonnes (mt) up to 31 December 2020 meaning that it was just 1.3% down on production compared with 2019 (1.329mt). This suggests that Covid didn't have a significant impact.</p> <p>Two planning permissions were granted in 2020 for additional sand and gravel extraction totalling 2,670,000 tonnes meaning that reserves of sand and gravel at 31 December 2020 were 14,511,385 tonnes, an increase of 7.4% on the 2019 figure (13,515,491 tonnes). Three sites have already been granted permission in 2021 but these will be reported in next year's LAA.</p> <p>Crushed rock (Carstone): Annual production was 55,907 tonnes up to 31 December 2020. This was 40.2% up on production in 2019 (39,878t).</p> <p><u>Essex</u></p> <p>Sand and gravel: Sales in 2020 stood at 2.96mt, a decrease of 6.6% on 2019 and a significant decrease compared with pre-Covid levels when sales were 3.45mt. Permitted reserves at the end of the year are marginally up on 2019 (33.59mt compared with 33.10mt). The landbank based on ten-year rolling average sales (years) stands at 10.3 years which represents an increase compared with 2019 (10.14 years) whilst the three-year rolling sales average is down on 2019 (3.23mt compared with 3.38mt).</p> <p><u>Hertfordshire</u></p> <p>Sand and gravel: The headline figures for 2020 show that total sales declined when compared to last year's figure (2019 sales figure stood at 1.25 Mt). At 1.12Mt, the sand and gravel sales reflect the anticipated drop in demand, as a direct consequence of the Coronavirus pandemic and temporary shutdown and slowdown in parts of the construction sector. The 2020 total sales figure (1.12Mt) is also below the 10-year average sales figure (1.19Mt) and below the 3-year average sales figure (1.19Mt). Reserves have decreased in line with sales (7.68mt in 2020, which is 1.27mt down on 2019) and the</p>	

current landbank stands at 5.9 years. This is based on Hertfordshire's revised Annual Provision Rate of 1.31Mtpa. It can supply aggregate for a period of 6.5 years based on the 10-year average sales data.

No new sites were granted permission in 2020; an application for the extraction of 3.52Mt sand and gravel at Land adjoining Coopers Green (Specific Site 3 in the Proposed Submission Minerals Local Plan) was received by the Council in Dec 2018 and was approved at Development Control Committee on 22 October 2020 but remains subject to a S106 agreement. A planning application for the extraction of sand and gravel on Preferred Area 1 in the Adopted Plan, Land at Hatfield Aerodrome (which is also identified as Specific Site 2 in the emerging Minerals Local Plan) was refused at Development Control Committee on 24 September 2020 and is now going to public inquiry scheduled to commence on 16 November 2021. If approved, this has the potential significantly to improve the landbank figures.

#### Bedfordshire

Significant disparities are apparent between the BGS survey figures and those submitted to Bedfordshire via local survey. Headlines from the local survey are as follows:

Sand and gravel: Sales in 2020 were 1.284mt, a decrease of 0.408mt on the previous year and representing 70% of the apportionment figure. Permitted reserves stood at 17.26mt, up by 1.04mt on 2019. The 10 year rolling sales average was 1.45mt meaning that sales in 2020 are below average for the first time since 2013. In comparison, the three year rolling sales average was 1.55mt. The landbank based on the 10 year sales average stood at 11.9 years which is up from 2019. The landbank based on the apportionment figure is 9.4 years. One permission was granted in 2020 in respect of a consolidating application for extraction of sand, installation of new processing plant and restoration by infilling with 3.9M m<sup>3</sup> of imported inert waste at Bryant's Lane and Reach Lane Quarries but this remains subject to a s106 agreement.

Crushed rock: For the first time in 2019, a very small amount of sandstone was included in a survey return. This figure cannot be separately reported because it is confidential; however, it will be amalgamated with other crushed rock figures in the annual report going forwards. Note that this figure was not reported in the BGS survey.

#### Cambridgeshire and Peterborough

The examination hearing for the A428 DCO has delayed production of the LAA. However, a dashboard summary has been circulated. Headlines from this are as follows:

The landbank based on the three year sales average is the worst recorded at 11.45 years. The BGS data is circa 200,000t lighter than figures reported locally. The 2020 LAA will be the last to link to the previous plan since adoption of the Cambridgeshire and Peterborough Minerals and Waste Local Plan in July 2021.

	<p>Date for recycled aggregates is taken from the EA's WDI and will need to be inserted as 2020 figures are not yet available.</p> <p><u>Deadlines for specific comments on LAAs</u> (which should be sent directly to the relevant mineral planning authority) are as follows:</p> <p>Herts: By 20<sup>th</sup> October;</p> <p>Essex and Norfolk: by 27<sup>th</sup> October;</p> <p>Others – within 2 weeks of circulation of the draft LAA (as opposed to circulation of the dashboard summary).</p> <p><u>Railheads</u></p> <p>EF noted that Herts has two railheads under threat and queried whether attempts were being made to safeguard these as Cambridgeshire needs to safeguard one of its own railheads. CJ added that one of Norfolk's railheads is subject to continuing debate with the City Council as it seeks to regenerate E Norwich. AE said that Tarmac had made robust comments to the Council in this regard and MN added that the recently introduced agent of change principle in the revised NPPF should be of assistance with this.</p> <p><u>General</u></p> <p>AE queried whether LAAs generally should have a greater emphasis on longer term supply issues as they tend to present a false premise that all is well in this regard. JW commented that the LAAs do calculate likely remaining reserves through to the end of their plan periods; however, MN commented that these forecasts tend to be based on a 10 year sales average and that there is often no justification put forward for doing this. EF added that LAAs do attempt to take account of local infrastructure requirements, hence her endeavours to get detailed data for aggregate need from the Ox-Cam Arc project.</p> <p>MN stated that productive capacity was decreasing and that this will generate significant supply issues in future. It would be useful from an industry perspective to collect information on total productive capacity. JW noted that the SWAWP includes a section on this within their survey form and JW will circulate this for review. RR added that this would need proper discussion at a separate meeting if it is to be included in future LAAs.</p>	
7	<b>Ox-Cam Arc Update</b>	<b>MN</b>
	<p>MN reported that he had discussed a coordinated response to the recent consultation on the Ox-Cam Spatial Framework Sustainability Appraisal with Carl Bunnage who is head of policy at RSPB and had attended a workshop on the Spatial Strategy Consultation. MN had submitted a response on behalf of the MPA to the consultation, a copy of which has already been circulated to members. MN continues to impress upon DLUHC the need to liaise with mineral colleagues to ensure that minerals supply is not just assumed.</p>	

	<p>EF commented that a response to the above consultation had also been submitted on behalf of Cambridgeshire.</p> <p>RR added that he had been pushing for the Ox-Cam Arc to include a minerals and waste task group and this had finally been set up. This should include representation from industry and MN should be invited to attend.</p>	
8	<p><b>Mineral Products Association Update</b></p> <p>MN referred to the following market update which had been circulated to members prior to the meeting:</p> <ul style="list-style-type: none"> <li> <p><b>MPA MINERAL PRODUCTS MARKETS FORECAST</b></p> <p>The surge in demand during the spring has remained positive over the summer but somewhat softer, with concerns about supply chain issues such as the availability of HGV drivers and increasing costs and the impact they may have on supply capacity over the second half of the year and into next year. Sales volumes of primary aggregates are expected to rise by 12% in 2021 compared with 2020, 11% for asphalt and ready-mixed concrete, and 18% for mortar sales. Sales volumes are forecast to rise further in 2022 and 2023 but at a slower pace, supported by work accelerating on infrastructure projects.</p> </li> <li> <p><b>UK ECONOMY AND CONSTRUCTION: FRAGILE RECOVERY</b></p> <p>The UK economy narrowly avoided stagnation in July, with a monthly GDP growth rate of just 0.1%. Output in services and manufacturing was broadly flat and construction output fell by 1.6%, the fourth consecutive month of decline with reports of rising prices of raw materials and supply chain issues impacting on projects. The decline was led by private new housing and private housing repair and maintenance, whilst commercial output remains particularly subdued.</p> <p>The combination of stretched supply chains and cost pressures is threatening to slow the recovery. In construction, weak ONS output data contrasted with wider industry feedback indicating that demand remained robust over the summer. Prospects also remain upbeat, underpinned by a robust pipeline of new contracts. The supply of materials was reported to have improved in some areas such as bagged cement, but transport issues are growing, with reduced port capacity and a shortage of HGV drivers contributing to delayed material deliveries.</p> </li> </ul>	MN
9	<p><b>British Aggregates Association Update</b></p> <p>PH expressed continuing concern about the Ox-Cam Arc but wondered whether the need for it had diminished given that housing appears to be coming off the government agenda!</p> <p>PH expressed the hope that the current positive economic situation should continue despite ongoing issues with inflation and haulage.</p>	PH
10	<p><b>Mineral Local Plans Update</b></p>	MPAs / All

	<p>The Minerals Local Plan Update had been circulated prior to the meeting.</p> <p>RR commented that the Central Bedfordshire Local Plan was meant to be subject to review next year; however, the recent attempt to recruit a Principal Planning Officer as dedicated staffing resource for this project had resulted in zero applications.</p>	
11	<p><b>Any other business</b></p> <p>JW commented that she had received an email from North Northants asking for comments on the draft Lincolnshire LAA covering data for 2020. JS did not think that this was something that EEAWP regularly commented on but suggested that it be circulated to members for review in any event. JW will circulate this for members to respond directly to North Northants, if appropriate.</p> <p>NE had a number of items to note on behalf of the Crown Estate, as follows:</p> <ol style="list-style-type: none"> <li>1. The Crown Estate has published its 2021 annual Capability and Portfolio brochure (reporting on calendar year 2020). This publication provides a summary of extraction and delivery statistics and reserve figures for marine aggregate resources on both a national and regional basis – it can be downloaded from the following page on our website:  <a href="https://www.thecrownestate.co.uk/en-gb/what-we-do/on-the-seabed/minerals-dredging/">https://www.thecrownestate.co.uk/en-gb/what-we-do/on-the-seabed/minerals-dredging/</a></li> <li>2. The Crown Estate has launched the 2021 marine aggregates tender. ITT documents have been issued. Subject to bid submission, assessment, moderation and our own internal governance and approvals process, we anticipate commencing a plan level Habitats Regulations Assessment in the spring of next year. We are likely to issue new Exploration and Option Agreements to successful applicants towards the end of 2022.</li> <li>3. In relation to the discussion around the AM 2019 survey conducted by BGS, I would note that on a national basis (England and Wales) there was variance of around 2 million tonnes between the statistics issued by The Crown Estate and the output from the AM Survey. Our statistics reported a total of 13.4 million tonnes being landed at UK wharves for construction use, against a total of 11.4 million tonnes from the survey. Our statistics are based on returns provided by the dredging operators relating to tonnages landed. These returns are used as the basis for royalty payments, and are subsequently audited by our managing agent.</li> <li>4. Finally, a reminder that there will be a webinar on the subject of marine aggregates hosted by the Institute of Civil Engineers on behalf of the Central Dredging Association (CEDA) at 2pm on</li> </ol>	All

	<p>Thursday 14<sup>th</sup> October. As per JW's e-mail of 27<sup>th</sup> September, the link for registration is:  <a href="https://www.ice.org.uk/events/marine-aggregates-in-the-uk-online">https://www.ice.org.uk/events/marine-aggregates-in-the-uk-online</a> . The event is free to attend.</p> <p>KHH raised an issue concerning delays in EA permitting which is now starting to have an impact on commencement of extraction. She asked if RR could raise this for discussion at the next WTAB meeting. RR acknowledged the issue and commented that the EA is now taking more than 18 months to make minor decisions. AE added that there also appears to be a conflict between how the mineral planning authorities and the EA deal with noise assessments, with the EA applying different standards and demonstrating a lack of respect for the planning system. MN agreed that this was becoming an issue and suggested that DLUHC may want to address it as the EA will not engage on it, despite attempts by the MPA to discuss it with them. VS said that she would relay this back to her team.</p>	
12	<b>Dates and times of next meetings</b>	<b>RG</b>
	<p>Broad dates for next year's meetings were briefly discussed and it was suggested that they be held in January, June and November, as October seems to be a little premature to discuss LAAs. JW will liaise with RG regarding specific dates in January and will circulate suggested dates in due course.</p>	<b>ALL TO NOTE</b>
	The meeting closed at noon.	

Action points from the meeting:

- It is suggested that participating mineral planning authorities include a copy of the link to the DJA EEAWP webpage on their websites:  
<https://davidjarvis.biz/east-of-england-awp/>
- AWP members are invited to give input to DLUHC into the revision of the National Guidelines and how they are to be calculated.
- RR to try and identify the most appropriate source of data for assessing quantities of recycled and secondary aggregates. RR to circulate the minutes of the national RWTAB chairs meeting when these are available. JW to seek member comments on RR's note before submitting to VS for review. This matter to be added to the next agenda for discussion at the next meeting.
- JC and MN to follow up with Cemex / Breedon on data required from two significant sites which is needed by Suffolk for its LAA.
- JW to present the BGS survey figures in the annual report and use these to calculate averages. JW to make sure that locally obtained figures are also shown. LAAs which seek to use their own figures should make sure any inconsistencies with the BGS data are explained.
- Deadlines for specific comments on LAAs (which should be sent directly to the relevant mineral planning authority) are as follows: i) Herts: By 20<sup>th</sup> October; ii) Essex

and Norfolk: by 27<sup>th</sup> October; iii) Others – within 2 weeks of circulation of the draft LAA (as opposed to circulation of the dashboard summary).

- Productive capacity: JW to circulate the section within the SWAWP survey which deals with productive capacity. This should be added to future agendas for continued discussion.
- JW to circulate an email from North Northants asking for comments on the draft Lincolnshire LAA covering data for 2020 to which members should respond directly to North Northants.
- RR to raise for discussion at the next WTAB meeting the issue concerning delays in EA permitting which is impacting on commencement of extraction.
- DLUHC is asked: i) to liaise with mineral colleagues to ensure that minerals supply is not just assumed; and ii) to address the EA's approach to noise assessments. VS to relay this back to her team.
- JW to liaise with RG regarding specific dates for a meeting in January.