

APPROVED MINUTES

East of England Aggregate Working Party

Meeting on 14 October 2025 starting at 11am

Venue: Virtual meeting via Microsoft Teams

ATTENDEES

Authority Members	
Caroline Jeffery (CJ)	Norfolk County Council – EEAWP Chair
Phil Dash (PD)	Essex County Council
Chris Stanek (CS)	Essex County Council
Jake Kelley (JK)	Bedfordshire Authorities
Matthew Breeze (MB)	Cambridgeshire County Council / Peterborough City Council
Ross Walker (RW) Charlotte Brinkley (CB)	Suffolk County Council
Claire Victory (CV)	Southend-on-Sea City Council
Finlay Banks (FB)	Hertfordshire County Council
Industry Members	
David Payne (DP)	Mineral Products Association
Simon Treacy (ST)	Brett Group / MPA
Pawel Zlocki (PZ)	Heidelberg Materials UK
Kirsten Cunningham (KC)	Holcim Group / MPA
Lewis Williams (LW)	Breedon Group
Others	
Julia Webberley (JW)	EEAWP Secretariat
Dave Pitt (DJP)	EEAWP Secretariat
Jim Davies (JD)	MHCLG
Apologies	
Richard Greaves	Norfolk County Council
John Carlon	BAA
Alan Everard	Tarmac
Mark Page	Heidelberg Materials UK
Sidonie Kenward	MMO

The meeting commenced at 11.00am.

Item No.	Subject	Owner
1.	Welcome, introductions and apologies	CJ
	<p>CJ welcomed everyone to the meeting and each attendee introduced themselves. JD explained that he was the new representative for MHCLG and that he was on secondment with MHCLG for a year. Finlay Banks was representing Hertfordshire County Council in Freya Ward's absence.</p> <p>JW ran through a list of apologies, as set out above.</p>	

2.	Minutes of the last meeting and matters arising	CJ
	<p>CJ ran through the minutes and the list of action points arising from the last meeting held on 24 June 2025. Most of these had been completed or were due for discussion under later items in the agenda. JD was asked to note two matters which were raised at the last meeting, as follows:</p> <ul style="list-style-type: none"> a) the need for MHCLG guidance on production capability, both as to how to acquire data on production capability and how to present it in the annual report; and b) the desire for a universal survey form for collecting operator data for inclusion in the annual reports in order to provide uniformity of responses across the regions. <p>The minutes of the last meeting were deemed agreed. A copy will be uploaded on to the David Jarvis Associates website, available here: https://davidjarvis.biz/east-of-england-awp/</p>	
5.	Update from MHCLG	CD
	<p>JD gave an update as follows:</p> <ul style="list-style-type: none"> • Work on the Levelling-up and Regeneration Act is ongoing. • The Planning and Infrastructure Bill is now at report stage in the House of Lords. • Revised NDMPs are still planned but no date has been given as to when this will happen. • The 2023 Annual Minerals Survey was published in August. It can be accessed here: https://www.gov.uk/government/publications/aggregate-minerals-survey-for-great-britain-2023 • The AWP contracts are due to determine at the end of March 2026. A tender process for new contracts is planned to get underway soon. • It is hoped that an NACG meeting will take place before Christmas. 	
4.	Operator data collection for 2024 and proposed online form	CJ / MB
	<p>Following the last EEAWP meeting, MB and CJ had looked at various survey forms used across the country to collect aggregate data, including the form used by the BGS as part of the AMS 2023. As the BGS form was already in Excel format, but in a format that could be printed and used as a hard copy form, contained additional guidance and could be standardised and used for all regions, MB and CJ had used this as a basis to create a draft online survey form for consideration by EEAWP members. Seeking to amend the existing BGS survey form template meant that it was also possible that the new form could be ready to use in early 2026 for the 2025 survey. CJ noted that an online Microsoft form would also need to be created to be used as an alternative to the Excel format. She added that some site details could be pre-populated and contain drop-down selection</p>	

options (such as for source and destination), which would serve to shorten the form. CJ highlighted that some mineral types, not necessarily of relevance to the East of England, had been left as options to tick on the form so that the form could potentially be used by other AWP regions in future.

A copy of the draft form had been circulated to attendees before the meeting.

MB and CJ were now seeking feedback from members on a number of questions, as follows:

1. Does the form need to contain questions about recycled and secondary aggregates at all? If all MPAs are using the Environment Agency's WDI data for this section of their LAAs, is this unnecessary duplication that could be removed from the form?
2. The current EEAWP form refers to 'non-energy minerals'. Whilst this term is used in the NPPF, the BGS form just lists all mineral types and doesn't use this term. We therefore propose just listing all potential mineral types, in line with the BGS form, if AWP members agree. Are all required mineral types listed in the BGS form?
3. The BGS form lists all possible destinations for minerals by MPA. Should the EEAWP form include this full list of destinations, or have a shorter list (eg all MPAs in and adjacent to the EEAWP area) followed by a free text option, or just a free text option, or will operators not want to complete this section on an annual basis? We considered that it is very useful for MPAs to have this information on mineral movements.
4. The BGS form also included a question on how the mineral was transported to the destination – road, rail or water. Do we need to include this question in the annual form or not?
5. Additional question for Mineral Planning Authorities – Do you have access to / the ability to use Microsoft Forms? Yes / No.

There was some discussion about the above questions during the meeting. In response to question 1, all authorities now use the WDI to obtain their recycled aggregate data. JW queried how authorities obtain their secondary aggregate data and most advised that this was now also obtainable via the WDI. RW advised that Suffolk had sent out forms to two sites but the operators had responded to say that they would not be responding to the forms as the data was already available via the WDI. It would appear, therefore, that the online form will not need to contain questions about recycled and secondary aggregates at all.

In response to question 3, there was some debate as to whether the information would be required on an annual basis or not. CS suggested that the information obtained would be most useful when plans are being reviewed. PD added that trend data rather than point data was more useful when it came to plan reviews and checking policy efficacy so if the information was readily available to operators, then it would be worth collating. On behalf of the industry, LW thought that it would be easier to provide the data if it was derived internally as opposed to being customer data; KC advised that the data was available but could take some time to collate; this was endorsed by ST who added that a response could be provided via the MPA but, generally, obtaining such

	<p>information on an annual basis would be useful, especially for producing LAAs. CS added that the question of the mode of transport is not so important but how much mineral each authority is importing or exporting annually would be useful.</p> <p>JW advised that the online form had been raised for discussion at a meeting of the AWP secretaries which took place on Monday 13th October. Other AWP representatives had expressed great interest in the form as it had been hoped that MHCLG would have been in a position to produce a standardised survey form before now. JW thought that it was possible that this form could ultimately be used across the regions and she thanked MB and CJ for their efforts in producing it. It is possible that MB / CJ may be asked to present the form at the next NACG meeting. One question which had been asked at the AWP secretaries' meeting was whether the form could be used to do a batch submission for multiple sites. MB advised that it was not currently set up for this but could be edited to accommodate it; he added that it may be possible for certain pages to be pre-populated to make it more efficient for use by operators with multiple sites.</p> <p>JK queried whether the confidentiality clause which appears on the BGS survey form might need to be edited to apply to mineral planning authorities. MB confirmed that he would run this past his data protection officer and the clause could be tweaked as required.</p> <p>Members are asked to respond to the above 5 questions within two weeks of circulation of the minutes. Subject to these responses, it is hoped that the online form may be ready for use by the end of the year.</p>	
5.	LAA status	JW
	<p>JW noted that LAAs for 2023 had been completed by all authorities with the exception of Suffolk, whose draft LAA had been circulated for comments the day before the meeting with comments due by 27 October, and Norfolk. CJ advised that the Norfolk LAA would be circulated by the end of the year. No LAAs for 2024 had yet been circulated; JW requested that when they were drafted, it was essential that they contained the same figures submitted to JW for inclusion in the 2024 annual report.</p> <p>In terms of the 2024 annual report, JW was still awaiting data from Essex, Hertfordshire and Suffolk and requested that this be submitted as soon as possible to allow JW to commence drafting.</p>	
6.	Mineral Products Association Update	DP
	<p>DP supplied an update as follows:</p> <ul style="list-style-type: none"> • UK ECONOMY <p>The UK economy remains fragile, with momentum likely to stay constrained through the rest of the year. Persistent inflationary pressures and the drag from higher taxes on businesses are weighing heavily on jobs and growth. The labour market has continued to soften, while at the same time, household finances are being squeezed by high inflation. This has reduced the prospect of additional</p>	

interest rate cuts this year, which in turn, is likely to slow the recovery in housing demand further into 2026. There is unlikely to be any let-up in business uncertainty in the near term as concerns grow over additional tax rises at the Budget on November 26.

- CONSTRUCTION

Growth in construction output this year appears overstated by the ONS, with other indicators pointing to falling activity. Primarily, there seems to be little confidence to invest in the UK against a backdrop of faltering growth, rising finance and construction costs, and increased business taxes. Housing remains stuck in first gear, hampered by affordability constraints, even as mortgage rates have dropped to their lowest level in three years. Regulatory bottlenecks at the BSR are further compounding the issues for high rise residential and mixed developments. Infrastructure and commercial contract awards have seen little improvement since last year, signalling weak sentiment and few new projects entering the pipeline.

- MPA MINERAL PRODUCTS MARKETS FORECAST - 2025-27, GB

Hopes of a rebound in mineral products sales in 2025 have collapsed. Worse-than-expected data in the first half of the year, coupled with a sharp deterioration in industry confidence, have led to major downgrades to the outlook since May. Members have described current market conditions as the toughest since the 2008 financial crisis. With the exception of mortar, markets face a fourth consecutive year of decline. Ready-mixed concrete sales are projected to contract by 6% in 2025, with a recovery only starting in 2027. Sand and gravel and asphalt are both forecast to contract by 3% this year, with a smaller 1% dip in sales of crushed rock. Mortar sees growth from a low level, rising 6% this year, a downgrade from 9% in May. 2026 expectations have also softened across the board.

DP added that, overall, the position does not look good with all primary aggregate forecasts down. He noted in particular the dire state of housing development in London where just 2,500 start ups have materialised out of a target of 88,000!

DP highlighted to JD the continuing main concerns of the MPA:

- a) The requirement for new national guidelines. MHCLG had previously agreed that these were needed as they form an important part of MASS and their absence results in the inability of mineral planning authorities to ascertain aggregate demand; however, no progress has been made on them.
- b) The 2042 end date which impacts on approximately 75% of reserves in the UK. The MPA had previously procured a written legal opinion from Richard Kimblin KC who had prepared an insert for inclusion within the PPG to make it clear that permissions could be extended by way of s73

	<p>applications and / or ROMPs. MHCLG lawyers had agreed with this approach but, again, nothing has happened since.</p> <p>c) The question as to where minerals will sit within the wider planning system following council reorganisation. In this regard, CS noted that minerals and waste planning needs to operate on a geographic scale and, where mineral planning authorities are to be split up, the effect will be that a strategic function will be broken down into smaller parts. He explained that if the intention was for mineral planning functions to reflect wider mayoral authority areas, a statutory instrument would be needed to achieve this, specifically an amendment to the English Devolution and Empowerment Bill. To break it up into unitary authority areas, nothing needs to happen but the more unitary authorities which are required to work together, the more committee cycles would be required to accommodate this. Timetables would need to be extended. Awareness of this issue needs to be raised! CS added that Richard Greaves in his role at the PoS had written a letter to MHCLG about this but guidance is urgently required and minerals and waste planning needs to be retained at the larger geographical scale. CJ added that she had attended various mineral planning authority meetings from which she understood that Spatial Development Strategies (SDS) cannot allocate sites. It will be left up to each mayoral combined authority as to whether they include mineral and waste policies within their SDS but the expectation is that mineral local plans will still be needed to allocate sites. PD highlighted a further complication to the effect that authorities would need to break down the sub-regional apportionments into appropriate apportionments for their areas. For this reason, the amendment to the English Devolution and Empowerment Bill was considered to be the preferred option. JD said that he would investigate this and report back.</p> <p>JW asked DP whether there had been an update to the MPA's replenishment rate figures for 2024. DP said there had not been such an update yet but would let JW know if one was published.</p>	
7.	British Aggregates Association Update	JC
	<p>John Carlon was absent from the meeting but had provided a brief written update as follows:</p> <p><i>“There is not much to report from the BAA on the planning front. The landfill tax consultation has been noted with over 400 responses and we await the budget and new landfill tax rates. The Treasury was surprised by the response and impact on the construction sector. Construction activity is down this year.”</i></p>	
8.	Mineral Local Plans Update	MPAs / All
	The Minerals Local Plan Update had been circulated prior to the meeting. No additional comments were received.	
9.	Any other business	All
	<u>Aggregate / non-aggregate minerals split</u>	

The question of separating out reserve and sale figures for aggregate and non-aggregate minerals had been retained on the agenda as it was felt that this was something which **MHCLG should be aware** of. Whilst it was noted that the AMS 2023 concentrated on aggregate mineral sales totals, and these were the figures that JW had included within the annual report for 2023 to ensure consistency with the AMS, this had, in fact, resulted in figures appearing anomalous compared with previous annual reports. For this reason, JW planned to revert to reporting totals in the way in which authorities recorded them in order to render comparisons of data with earlier years more meaningful. (John Carlon had explained in an earlier meeting that any split between aggregate and non-aggregate reserves at a site level was likely to be hypothetical, based on percentages applied depending on how aggregate had historically been used.) **This was therefore something which may need further discussion in future with whichever body undertakes the next 4-yearly survey.**

80/20 recycled aggregates split between fixed / mobile plant

The 80/20 split of recycled aggregates from fixed / mobile plant was raised for discussion by JK as there was clearly some inconsistency in how authorities applied the split between fixed and mobile plant with some adding 20% and some 25% to their fixed figures to account for mobile plant. However, despite the inconsistent approaches, JK agreed that it was preferable for authorities to continue with whichever method they were currently using to enable meaningful comparison of data with earlier years.

Essex Minerals Plan Review update

ST asked if there was now a date for the next stage of preparation of the Essex Minerals Plan Review. CS advised that Essex was working on publication of a timetable but it was likely that the Regulation 18 'Preferred Approach' would be consulted on in mid-2026.

EA Sustainable Abstraction Licensing process in Norfolk

[The Broads SAC - Sustainable Abstraction Plan | Engage Environment Agency](#)

DP noted that the Environment Agency's Sustainable Abstraction Licensing process in Norfolk (see above link) was causing concerns amongst operators and constraining activity. He wondered if CJ was aware of discussions about it within Norfolk County Council (NCC). **CJ advised that she had not been involved in any recent discussions but would make enquires on this and revert back.**

[Post meeting notes: a) CJ has enquired at NCC whether anyone is aware of the issue being discussed by mineral operators in Norfolk and NCC is aware of only one mineral extraction site where the operator has raised this as an issue. If other sites are having issues, these have not been relayed to NCC; and b) JK has advised that it might be worth noting that Defra is consulting on new water standards for housing through the building regulations: [Review of Water Efficiency Standards in the Building Regulations 2010 - Defra - Citizen Space](#)

	<p>In theory, reducing water consumption for residential uses should help to relieve pressure on supplies and potentially go some way to addressing concerns around abstraction licenses for quarries/ recycled aggregate operations. The consultation proposes a standard of 105l per person per day but there are strong arguments that this should be closer to 85l/p/d: shared-standards-in-water-efficiency-for-local-plans.pdf]</p> <p><u>MMO</u></p> <p>An update from the MMO had been supplied to the meeting as follows:</p> <ul style="list-style-type: none"> • Over the last six weeks, the Marine Planning team has engaged with stakeholders across a variety of organisations on the East Marine Plan development. • Three workshops were held across the East of England. The events provided an opportunity for the Marine Planning team to update stakeholders on the East Marine Plan development process since the Issues with Supporting Evidence engagement in 2024, and for stakeholders to input on policy development. • Stakeholders were engaged particularly during the interactive sessions on policy drafting, spatial planning, and different marine planning scenarios. There were great discussions with some thought-provoking questions and comments for the team to consider as plan and policy development continues. • Following the in-person workshops, two internal online sessions and two external online sessions had taken place. The sessions were adapted for an online audience but followed the same approach to ensure consistency across all in-person workshops and the online sessions. • All the information and data collected will be analysed and used as the MMO continues to develop the plan and policies. • An engagement summary report will be published externally in due course. 	
10.	Date of next meeting	CJ / JW All to note
	<p>The next meeting is proposed for February next year (with the option of calling an extra meeting at the end of November if members wish to discuss the annual report once it has been circulated in draft).</p> <p>JW will liaise with CJ regarding a specific date and will circulate an invitation in due course.</p>	

The meeting finished at 12.25pm.

Action points

- a) JD to note two matters raised previously, namely the need for MHCLG guidance on production capability (both as to how to acquire data on production capability and how to present it in the annual report); and the desire for a universal survey form for collecting operator data for inclusion in the annual reports in order to provide uniformity of responses across the regions.
- b) JW to upload a copy of the last minutes on to the David Jarvis Associates website.
- c) MB to run the confidentiality clause in the proposed online survey form past his data protection officer.
- d) Members are asked to respond to the 5 questions set out at item 4 above within one week of circulation of the minutes.
- e) When members draft their LAAs for 2024, they should ensure that the LAAs contain the same figures submitted to JW for inclusion in the 2024 annual report.
- f) Essex, Hertfordshire and Suffolk are requested to submit their data for inclusion in the annual report as soon as possible.
- g) MHCLG is asked to note continuing concerns regarding the need for new national guidelines; the 2042 end date which impacts on approximately 75% of reserves in the UK and the question as to where minerals will sit within the wider planning system following council reorganisation.
- h) JD to investigate whether an amendment was proposed to the English Devolution and Empowerment Bill or how else minerals were to fare within the council reorganisation process and to report back.
- i) DP to advise JW if an update is published by the MPA to the stated aggregate replenishment rate.
- j) MHCLG to note continuing concerns regarding the separating out of reserve and sale figures for aggregate and non-aggregate minerals as adopting the BGS / AMS approach of concentrating on aggregate minerals only is resulting in skewed figures and data becoming incomparable with earlier figures. This is something which may need further discussion in future with whichever body undertakes the next 4-yearly survey.
- k) CJ to make enquires on the sustainable abstraction process in Norfolk and revert back.
- l) JW to liaise with CJ regarding a specific date for the next meeting in February and circulate an invitation in due course.