



South East England Aggregates Working Party

Technical Secretary: Richard Read BA. MRTPI

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Minutes of the Meeting of 4 Dec 2025

Attendees

Tony Cook		Chair
Richard Read		Secretary
Andy Denton	AD	SEEAWP Secretariat
Jim Davies	JD	MHCLG
Ross Orchard	RO	MHCLG
Melissa Spriggs	MS	Hampshire/Central and Eastern Berkshire
Sophie Champion	SC	Hampshire/Central and Eastern Berkshire
Tim Wright	TW	Buckinghamshire
Helen Ogden	HO	East Sussex
Bryan Geake	BG	Kent
Lewis Ford	LF	South Downs National Park Authority
Ian Blake	IB	Medway
Luke Gledhill	LG	Milton Keynes
Charlotte Simms	CS	Oxfordshire
Helen Gosnell-Whyman	HGW	Oxfordshire
Benjamin Brett	BB	Surrey
Francis Ford	FF	Surrey
Alistair Buckley	AB	West Berkshire
Eleanor Harman	EH	West Sussex
Mike Lowe	ML	BAA/Summerleaze
David Payne	DP	Minerals Products Association
Emma Pearman	EP	CEMEX
Phil Aust	PA	Day Group
Jolyon Fallon	JF	Grundon
Monika Gogol	MG	Grundon
Marie Canny	MC	Marine Management Organisation
Joel Morris	JM	Heidelberg Materials

Note: Actions arising from discussion at the meeting are listed at the end of the Minutes

1	Welcome, Introductions and Apologies
	<p>The Chair welcomed everyone to the meeting.</p> <p>Apologies were noted from Emily Brown (Buckinghamshire), Chris Mills (IoW), Richard Ford (Brett Group) and Jo Baker (Holcim UK).</p>
2	Minutes and related matters
2.1	Minutes of 8th May 2025
	<p>The Chair asked if the group wanted to raise any issues with the May meeting minutes.</p> <p>The Secretary explained that the minutes were agreed previously via email as required by the SEEAWP contract.</p>
2.2	Actions arising from 8th May meeting; and other matters meeting arising not included on the agenda
	<p>The Secretary asked for queries regarding the actions from the May meeting. No comments raised.</p>
2.3	Correspondence & Consultations
	<p><i>Government Landfill Consultation</i></p> <p>The Secretary reported that SEEAWP had responded to this consultation. The SEEAWP response was based upon the MPA response.</p> <p><i>GLA London Plan Easy Read</i></p> <p>The main consultation was missed on this Plan, the Secretary on behalf of SEEAWP responded with the main concerns regarding wharf capacity and infrastructure safeguarding.</p>
3	Revised SEEAWP Terms of Reference (ToRs)
	<p>The Secretary considered the changes to the ToRs are small but designed to protect members confidential data.</p> <p>The change provides a clause that requires the ring-fencing of SEEAWP data. It should not be open everyone in a member's organisation. It is recognised that members' organisations have different and multiple remits that may conflict with SEEAWP</p>

	<p>DP raised that a reference to the Competition Act 1998 might be worth adding to the SEEAWP ToRs. Previous experience has shown that misconceptions have been held by the Competition and Markets Authority regarding the discussion of sales prices etc. at SEEAWP meetings.</p> <p>The Secretary requested that DP send over the wording used by MPA so that it can be incorporated in the ToRs.</p>
4	Draft SEEAWP Annual Report (AR) 2024
	<p>The Secretary provided a presentation summarising the data and conclusions of the Annual Report 2024 and invited comments on the points raised.</p> <p>DP confirmed the MPA growth figure predictions used in the presentation and added that sales data does not support the prediction. DP highlighted that sales seem to be low this year.</p> <p>The Chair asks what the MPA meant by ‘short term’ forecast. DP confirmed this meant 2024 – 2028.</p> <p>The Secretary asked DP if crushed rock has been stagnant on a national scale. DP confirmed that the 2024 data show a steadying of sales.</p> <p>The Secretary asked CS if she had any comments on the crushed rock issue. CS confirmed that crushed rock imports into Oxfordshire went up 500% in 2023/24, this correlates with the height of the HS2 works in Oxfordshire. CS thinks it will be interesting to see if this increase moves northwards as HS2 moves through the country.</p> <p>The Chair raised that this is only one year’s data which can’t be used to extrapolate future imports. The Secretary agrees but there are infrastructure prospective projects that could cause similar or prolonged increases in imports.</p> <p>CS asked the Secretary if other AWP’s are experiencing dropping sales of CR, as they send it to Oxfordshire. The Secretary confirmed he would raise this at the next NACG meeting.</p> <p>MS raised the issue of NSIPs/DCOs which are currently present in Oxfordshire and Hampshire. Solent Gateway in Hampshire is coming forward and could be an opportunity for future wharf capacity.</p> <p>PA raised a comment about sales trends. The national picture shows continual decline since 2015 for S&G sales; CR sales have been declining since 2021. The static trend in the South East seems to show the region is doing alright. This drop in CR sales comes following the peak after the Covid pandemic.</p> <p>TW asked if there are other factors that could contribute to the drop in primary aggregate sales. Are we building differently? Is there a change in the materials being used?</p>

	<p>PA doesn't believe there has been a change in what material is used. It appears that as less material is available the sales have dropped.</p> <p>BB asked industry reps if there has been a noticeable change in the supply location for ready-mix concrete material? PA answered that ready mix plants can take aggregates from anywhere, monetary reasons would dictate, but ready-mix concrete would not move very far once produced.</p> <p>The only trend that PA has seen is that ready-mix concrete production has fallen to its lowest in 60 years.</p> <p>DP provided a link to the MPAs assessment of relationship between construction output and aggregate sales¹ and a recent press release regarding the construction aggregate demand in the UK².</p> <p>PA raised that the decline in recycled aggregate production seems to be linked to the decline in primary aggregate sales. PA agreed with the Secretary about the potential limit on the contribution that R/SA can make. Recycled aggregates need feedstock to be produced, as material slows in sales there is less material to make useable recycled aggregate.</p> <p>PA added that the group needs to be clearer in future regarding imports of material. The Secretary confirmed that imports mean material from other regions within England and Wales and material from Outside England and Wales including Scotland which appears to be an important source for the South East MPAs.</p>
5	South East MPAs Local Aggregate Assessments (LAAs)
	<p>The Secretary gave a presentation on the 2024 draft LAAs.</p> <p>The Chair asked for comments on the SEEAWP LAAs.</p> <p>PA queried if there is an intention to circulate the LAAs to industry. The Secretary confirmed that the secretariat will circulate the LAAs to industry as soon as possible and apologised for overlooking them when the LAAs were circulated.</p> <p>ML asked the Secretary regarding SEEAWP's assessment of Buckinghamshire's LAA. Is the interpretation correct that sites coming forward is an unknown? The Secretary asked TW to elaborate if possible. TW confirmed that Buckinghamshire has allocations that have not come forward, and some sites that have pending decisions. The Minerals Plan has been reviewed but this may be done again in the next five years. Buckinghamshire are going through a Local Plan now, which may uncover prior extraction sites for minerals.</p>

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https://www.mineralproducts.org/MPA/media/root/Publications/2024/MPA_Regional_overview_of_construction_and_mineral_products_markets_in_GB_2024.pdf

² [Demand for construction materials stuck at crisis levels warns MPA](#)

	<p>The Secretary added that he thinks the Buckinghamshire LAA should detail if the outstanding opportunities would increase the landbank to NPPF requirement.</p> <p>ML queried the role of building sand in the landbank. If soft sand sales are included in the sales rate, this would cause the sales rate to become more static due to the smaller sales totals for soft sand.</p> <p>The Secretary added that this was discussed last year and there is an ongoing issue of some MPAs having more soft sand reserves than SS&G. This creates a skew in the landbank figures because the soft sand landbanks are much higher due to the lower sales.</p> <p>The Secretary confirms that this issue is discussed within the AR and last year's AR.</p> <p>PA agrees with ML about splitting soft sand data in the LAAs.</p>
6	Government Update
	<p>JD provided an update from MHCLG.</p> <p>Work is continuing on the AWP contracts; it is desired that the contracts carry on seamlessly. Sign-off is required but work continues.</p> <p>NPPF draft is still planned for this year. JD encouraged all members to engage in the NPPF consultation when it goes live.</p> <p>The Planning and Infrastructure Bill has one further amendment which is due for approval this month.</p> <p>The Secretary highlights the need for urgency on the AWP contracts amid concerns surrounding the next years' meetings etc. JD confirmed that there are a number of levels of sign-off to work through and work is proceeding at pace.</p> <p>JD added that a feedback exercise will hopefully be worked in.</p> <p>CS asked if JD sees big changes coming for minerals in the new NPPF? JD replied that Christina Davey has been pressing for the NPPF to reference the need for a continual supply of aggregates to deliver 1.5 million homes.</p> <p>DP asked if work on PPG and the 2042 aggregate site end dates has been progressed? JD answered that once the NPPF is published then PPG will need to be visited. There is no legal impediment to the 2042 end dates being extended.</p> <p>DP highlighted the crushed rock quarries in Somerset as having end dates of 2030 and 2040, these are going to be massive for future provision to the South East.</p>

	<p>DP asked if the aggregate guidelines have been progressed? JD has seen nothing on this workstream.</p> <p>DP asked if there will be any mineral specific decision-making policies? JD cannot share any comments on this.</p> <p>The Secretary asked if an NACG has been programmed in. JD doesn't have a draft date in mind, but during the NPPF consultation might be a good time for one.</p> <p>The Chair raised that the NPPF consultation will likely end before any further SEEAWP meeting, meaning no chance to discuss a response in person. The Secretary highlighted that a response would be drafted and sent round for comment.</p>
7	Any other business
	<p><i>Crushed Rock Import Figures</i></p> <p>The Secretary invited comments on the anomalous results from the National Collation regarding rail and wharf imports of crushed rock.</p> <p>PA thinks this is an issue with the question that BGS is asking operators in the National Collation.</p> <p>The Secretary agreed to raise this issue with BGS. Is the material being allocated to correct mode of transport? Is there double counting? The Secretary believes the mode of transport should be published in the National Collation report, as it is an important consideration for infrastructure planning.</p> <p><i>NSIPs/DCOs</i></p> <p>CS raised the issue of NSIPs. Botley Solar Farm in Oxfordshire sterilised 6 Mt of crushed rock. A current Rail Depot NSIP will sterilise up to 55 Mt of aggregate if the whole site is developed. Another has come to pre-app which could sterilise further resources.</p> <p>DP added that the MPA has been pushing for large infrastructure projects to consider the sources of aggregates, particularly the Lower Thames Crossing. The DCO included an 'LAA' to show how much material they expect to need and where this will come from.</p> <p>DP agreed to share this with CS.</p> <p><i>SEEAWP Online Map</i></p> <p>AD raised that work on the SEEAWP interactive map is continuing. A further data request to MPAs before Christmas for some site data so that the map can be updated.</p>

	<p><i>SEEAWP Annual Report Appendix 1 – SEEAWP Membership</i></p> <p>The Secretary has concerns that the membership list of SEEAWP is getting quite long and leads to the missing of contacts for communications.</p> <p>The Secretary would like to focus the list on one member per organisation, who will be responsible for passing on information etc. He emphasised that multiple attendees from a member organisation at SEEAWP meetings are welcome.</p> <p>The Secretary will circulate an email to confirm contacts.</p>
8	Meeting Programme
	<p>AD explained that the SEEAWP contract is not yet confirmed for 2026 and so the below meeting dates are provisional.</p> <ul style="list-style-type: none"> i. 7th May 2026 TBC ii. 3rd December 2026 TBC <p>These meetings will be online, as is the general practice with all AWP's, to maximise attendance, but are subject to change based upon the SEEAWP contract position.</p>

Actions – arising from meeting on 4 December 2025

1. DP to send the Secretariat MPA wording on the Competition Act 1998* to be included in the SEEAWP ToRs which the Secretary will amend and circulate for comment.
2. The Secretary to raise the crushed rock import issue at the next NACG meeting and raise with BGS anomalies regarding transport flows.
3. The Secretariat to circulate draft LAAs to industry. *Completed*
4. DP to share the Lower Thames Crossing aggregate need assessment with CS and SEEAWP.
5. The Secretary to contact SEEAWP members to confirm contacts.
6. The Secretary to submit and amended AR to MHCLG by the end of the year after considering comments.
7. The Secretary to feedback comments on the submitted LAAs to the MPAs

*** COMPETITION ACT 1998 & ENTERPRISE ACT 2002**

Members attending this meeting are required to certify that they will not at any time whilst on the meeting premises engage in any form of anti-competitive practices including exchanges of price information. In addition, exchange of other financial or sales information is prohibited where, for example, it is possible to disaggregate information to identify participants.