

Minutes of London Aggregates Working Party

29 April 2025

Virtual Meeting via Microsoft Teams

Chair: John Diver, GLA

Secretariat: Ngaire Thomson, Capita

Attendee	Abbrev	Organisation
John Diver	JD	Greater London Authority (GLA) (Chair)
Ngaire Thomson	NT	Capita
Linda Beard	LB	LB Havering
Duncan McKane	DM	LB Hounslow
Mark Wrigley	MW	Crown Estate
Simon Treacy	ST	Brett
Phil Aust	PA	Day Group
Jo Baker	JB	Aggregate Industries
David Payne	DP	Mineral Products
Sian Payne	SP	LB Hillingdon
Emma Lucy Pearman	EP	Cemex
Marie Canny	MC	Marine Management Organisation
Jill Warren	JW	LB Havering
Christina Davey	CD	MHCLG
Clare Loops	CL	LB Bexley
Hassan Ahmed	HA	GLA
Irina Davis	ID	GLA

1. Introductions and apologies

1.1 Apologies were recorded in advance of the meeting from:

- Mike Phillips
- Andrew Scott
- Mark Kelly
- Sidonie Kenward
- Michael Clarkson
- John Oosthuizen
- Catherine McRory
- Lauren Miller
- Joe Collinson
- Davis Dewar
- Valerie Mowah
- Ewan Coke
- Scott Wilding

- Eben West
- Richard Read
- Dean James
- Gavin Polkinghorn
- Katie Ryde
- Ben Ayres
- Lisa Russell
- Jake Hamilton
- Dean James
- Steven Wallis
- Alan Everard
- Marina Molla Bolta
- Suzanne Lansley
- Nina di Certo
- Joel Morris
- Narinder Dhesi

2. Minutes of the last meeting

- 2.1 Meeting notes agreed as satisfactory record of last meeting (3 December 2024).

Actions in the minutes to follow up on:

ACTION 1: JT to provide information on carbon emissions for water versus road transportation for the next meeting.

NT and JT have had email communication on this. Due to other work commitments it has not been possible for JT to provide the information.

ACTION 2: NT to invite Jorn to a future meeting to discuss industrial land studies. Jorn will attend the next LAWP meeting once evidence has been produced.

3. Annual Monitoring Report 2024 (2023 data) (NT/ JD)

- 3.1 This has been agreed by the group and has been approved for publication by Jules Pipe the Deputy Mayor for Planning Regeneration and Infrastructure and will be put onto the website once the accessibility has been checked.

4. Progress on Annual Monitoring Report for 2025 (2024 data) (NT)

- 4.1 The deadline for data is May 9th. Thanks to those who have already provided their 2024 data or contacted me about what I need. I will of course still be accepting data after the deadline and will be sending reminders out to operators.

5. MHCLG Update (CD)

- 5.1 National Aggregate Monitoring Survey (2023 data). The final report has been received from BGS. It is now in the process of getting clearance and sign off

so that it can then be published. The intention is that it will be put on the gov.uk web pages when has been done as with previous surveys.

- 5.2 This report contains information on England, Wales and Scotland and the report has been separated into the written report and an Excel spreadsheet that will contain the data. This allows the data to be interrogated which differs from the 2019 report where the data was contained in tables at the end of the written report. Although the regional reports have already been published this report gives a broader understanding of aggregates across the UK mainland.
- 5.3 Updating on the planning reform, since the last meeting, the Planning and Infrastructure Bill is now making its way through Parliament. There are a lot of measures in there, such as around spatial development strategies and changes to planning committees.
- 5.4 The other matter in terms of planning reform since the last meeting is the updated NPPF which was published in December to reflect the changes that we consulted on in the summer last year. There weren't any changes to the Minerals planning chapter, most of the changes focused upon the sections relating to housing and housing numbers.
- 5.5 The National Aggregate Coordinating Group (NACG) meeting was held earlier in April. The main focus of that meeting was a presentation from BGS on the aggregate mineral survey. A note of the meeting will be circulated to the AWP secretaries who will distribute it to the groups.

6. London Plan Update (JD)

- 6.1 Staffing update, since the last meeting Mat has left the GLA and Sophie Donaldson has joined as the Team Leader and Hassan and Irina have moved into the team as well. The team will be working on various policy projects related to infrastructure, including aggregates.

- 6.2 In February the Mayor published the New London Growth Plan [London Growth Plan | London City Hall](#)

It discusses housing, the London economy, jobs and supporting the workforce, and there's also some commitments relating to infrastructure.

- 6.3 The high level programme for the London Plan is that there is an ambition to launch a consultation version next year. At this point in time evidence is being collected to underpin that.

A list of the evidence being gathered can be found here:

<https://www.london.gov.uk/programmes-strategies/planning/london-plan/next-london-plan/london-plan-evidence?ac-67497=67489>

- 6.4 The new NPPF has presented a new context, therefore the next London Plan may take a slightly different approach for some of the policy areas. In part this is due to the enormity of the challenge that's presented by the new National Housing needs figures for London, which are, as you know, a considerable step up.
- 6.5 Consultation is soon to begin on a document that sets out at a high level direction of travel and scope of the changes that are envisaged for the next

version of the London Plan. We're planning to publish that in the next month. Not all of the policies are covered. It's not intended to be a kind of line by line audit of the London Plan. Policies that are unlikely to change a great deal are not the focus of the document.

- 6.6 However, it provides an idea of the direction of travel where change is needed and so there are various questions as part of the consultation about the approach and seeking opinion on different options for progression. It does have a section on growth as well as infrastructure, climate change and resilience which is probably most relevant to this group.

To sign up for notifications of planning policy consultations

<https://www.london.gov.uk/programmes-strategies/planning/statutory-notification-planning-policy-consultation>

To sign up for planning newsletters

<https://www.london.gov.uk/programmes-strategies/planning/planning-newsletter>

- 6.7 The safeguarded wharves document is being reviewed. A scope for the review has been prepared and its going through procurement at the moment. It will be a complex piece of work that includes wharves, rail heads and freight movements by train, which wasn't really covered in the previous study. It is also intended that light freight through the wharves, will be included, as it's something that should be understood better.
- 6.8 On the Local Aggregates Assessment, consultants are on board for that project now and it is under way. The inception meeting has only just been held so it's really just at the beginning of the process. But we're hoping to get the evidence back from that kind of early summer and we'll be sharing that with the group.
- 6.9 The LAA is a really critical piece of evidence, not just for us, but for the LAWP. Therefore the data needs to be as robust as possible. London is a little unusual as data usually feeds into the LAAs and then into the AWP AMRs. But in London it's the opposite way around. The LAA will need to make use of data usually only used for the AMR, and we'll need permission to use that. To prevent duplication of forms that have already been completed and shared with, for instance, NT or has been supplied as part of the BGS survey. It is proposed to send a data sharing request form. This would ask for approval for NT to share this year's and previous year's data and contact information with the consultants.
- 6.10 Another matter that the consultants will need information on is the expiry date of any planning permissions relating to quarrying. Many quarries across England and Wales have an end date of on or before 2042. We need to understand the expiry dates of all the quarries in London to understand this matter relating to the long term supply of sand a gravel in London.

Discussion on GLA matters

- 6.11 PA asked for an update on the London Industrial Land Supply Study which several of the operators had responded to consultation on. JD – There are several pieces of evidence underway that will inform the policies on industrial

land and economic development. The link provided lists the names of evidence to be produced as well as their estimated delivery time.

Action – invite Jorn to attend the next meeting to discuss industrial land studies.

- 6.12 MC – Interested in the integration of the South East Marine Plan with the London Plan. Also requested a list of the evidence documents – a link to this can be found earlier in the minutes.

Action - MC to contact JD in regards to how the London Plan can respond to the South East Marine Plan.

- 6.13 JB - LAA's usually focus on the aggregate from local quarries but the majority of London's aggregate is either from wharves or rail. So will the averages for sales from rail and wharves be included in the London LAA. JD confirmed that sales from all sources will be included in the LAA and also to have a more in-depth look not only at the 3 and 10 years averages but look at best practices for the industry. It will be discussed further at the next meeting.

7. Local Plan Updates

- 7.1 Hounslow (DM) – the submission of the Local Plan is imminent late May/ early June. Minerals Policy has been updated, it also proposes to safeguard the minerals railhead that we have at Transport Ave. There are also two allocated mineral sites in the borough proposed, that's Rectory Farm and Land Southwest of Western International Market, which is currently an active permission. Rectory Farm did have a permission which has now lapsed and will be recorded as such in the new AMR.
- 7.2 Bexley (CL) – Bexley Local Plan was adopted in 2023 but have started looking at how the level of consistency of the Plan to the new NPPF and making sure that it remains in general conformity with the London Plan as that progresses. Have recently published a Local Development Scheme. [Bexley LDS 2025](#). Currently undertaking a greenbelt review which is relevant to this group because the minerals safeguarding areas that are on the policies map and in the Local Plan are in the greenbelt. So, that's been a consideration in the methodology for the review.
- 7.3 Havering (JW) - shared a link to the Havering Local Development Scheme in the chat of the meeting. [Local Development Scheme 2025-2027](#).

8. Industry updates

- 8.1 Mineral Products Association (DP)

Encourage those on the call to sign up for the Mineral Planning Conference 10 June 2025. A major topic of conversation will be the Planning and Infrastructure Bill and how that impacts on minerals. While it's probably too early to know what the implications are going to be. The conference is an opportunity to explore the topic in a bit more detail by making the link between housing and infrastructure delivery, which is the focus of planning reforms and the supply of the materials to enable that, which has been an ongoing theme for the last 20 years at least. But it has come into focus again because the

reforms are all about housing, housing delivery, and speed of infrastructure delivery and not a lot of thought about where minerals planning fits into it.

After the LAWP Meeting DP sent through the following information:

Economic Update

Industry surveys suggested a dip in growth at the start of the year. PMI surveys for the manufacturing and construction sectors reported lower activity; the manufacturing index slipped to a 17-month low in March as new work faltered and firms warned of deteriorating domestic and overseas demand conditions. Geopolitical headwinds have risen sharply after President Trump's "liberation day" trade tariffs, which are poised to hit global growth and UK exporters. Forecasts for the UK economy in 2025 have dropped amid the elevated global uncertainty, although the overall impact on future growth, inflation and interest rates remains unclear.

Activity in the construction sector appears to be stuck in first gear, constrained by a challenging economic environment, persistently high energy costs, and continued wage pressures — all of which have dampened investment. The construction PMI survey reported falling levels of new work throughout the first quarter of 2025. A recovery in housebuilding activity is being held back by low consumer confidence and affordability constraints, with a more substantial fall in mortgage rates needed to drive a recovery. According to the CPA, construction output is forecast to grow by 1.9% in 2025 and 3.7% in 2026, lowered slightly compared to January. This is mainly attributed to a slower recovery in private housing in 2025, from 6% to 4%.

Sales volumes got off to a weak start in 2025. In 2025Q1 compared to 2024Q4, sales of ready-mixed concrete and asphalt both declined by 6.3%. Primary aggregates edged up marginally by 0.5%. In contrast, mortar sales rose by 3.8% — a fourth consecutive quarterly increase that suggests a gradual recovery in housebuilding is ongoing. Overall, mineral products demand remains vulnerable amid a combination of unstable economic conditions, cost pressures, and planning delays, which is undermining confidence to invest in new construction projects.

London is a separate market but does need to consider the national picture.

MPA held its *Quarries & Nature Awards* event on 18th March. We had over 30 high quality entries under the various categories. The films of each category, plus the introduction and post-awards interviews, are available here <https://www.youtube.com/watch?v=zjp1vAa7FKQ&list=PLXu4cRX3643cbm3eVjx-3O3XrKdIFMjZ6>

No entries from London (due to small number of quarries) but good practice which may be of interest to LAWP members (most of the industry reps on LAWP were there as they also operate outside of London).

- 8.2 JB – Update on the Robin's Wharf application – it has been called in by the SoS and inquiry date set for 20 June 2025. Proofs of evidence have already been submitted and currently working on the rebuttals.
- 8.3 ST – Agreed with JB on the application and reiterated it is a safeguarded wharf. Also wanted to mention that the Lower Thames crossing was approved in March which is relevant to this area. It will require a substantial amount of

construction materials. Aggregates, concrete, asphalt and structural concrete. Similar to the Thames Tide Way and HS2, it's a major scheme and to which the London area will be supplying aggregate. But with the NPPF requirements around housing, it really underlines the importance of the whole supply chain network wharves, railheads, quarries, and the land bank. To meet the development and infrastructure requirements there will be an increased demand going forward for construction and aggregate materials, recycled aggregates, so on so forth over this next economic cycle.

- 8.4 DP - a document that was produced by the promoters of Lower Thames Crossing was what they called a local aggregate assessment for the development. It quantifies or attempts to quantify the amounts of different materials that it'll be requiring and also looking at that against the data for local supply within Kent, Essex and London, so it's quite a good example and they didn't have to do that. They did it because of pressure from the Planning Authorities. It's quite useful thing to do and it's something MPA has been calling for a number of years for major projects to undertake. An audit of the material they're going to require and where the likely sources are going to be from because in the absence of that the Local Authorities have to guess.
- 8.5 MMO – (MC) updated the meeting on the East Marine Plan and then sent through the following information to be included in the meeting minutes:

East Marine Plan Development

The Marine Planning Team just published the '[Issues with Supporting Evidence' final report](#)', concluding the next step in the preparation of England's East Marine Plan. The East MP borders the SE MP to the north at Felixstowe in Suffolk.

For some background and context:

England's East Inshore and East Offshore Marine Plans are being replaced because after the Plans' [second three-year report \(2020\)](#) it was decided that the policies are no longer fit for purpose due to wider legislative and policy changes since the adoption of the plans in 2014. The process of preparing the East Marine Plan began with the [Statement of Public Participation \(SPP\)](#) which was published in April 2024. Following the publication of the SPP, the MMO initiated the Issues with Supporting Evidence stage of the process. The issues identified as part of this process will feed into the preparation of the Vision and Objectives stage for the new East Marine Plan.

During the Issues with Supporting Evidence (IwSE) stage of marine plan development - Stakeholders had their say on issues in the east marine plan areas through in-person and online events which took place late last year. Stakeholders also provided their views via the online platform 'Citizen Space'. 2,220 issues and 1,596 evidence items were presented over the course of the engagement period.

The report summarises stakeholder insights on the opportunities, challenges and needs for the east marine plan areas over the next 20 years, and details how our team will use this information in the next stages of plan development.

If members are signed up to receive marine planning comms, we will email them in advance of any future consultations going live. To receive marine planning updates and our newsletter enter your details [here](#).

Explore Marine Plans

[Explore Marine Plans](#) (EMP) is the MMO's online mapping tool. To find marine planning information for England, including data on marine licenses, environmental designations and policy information from regional marine plans.

Now with the next stage, will be looking at options and objectives with more stakeholder engagement towards the end of the summer.

9. AOB

- 9.1 PA – Request to standardise the forms that are used to gather data. The LAWP forms are different from the SEEAWP forms which are now excel based and it would make it easier for operators who have interests in several areas to have a standardised form across all AWP's.

CD - MHCLG are still keen to have a standardised set of forms, that all areas use and to standardise the data that's collected. Although we appreciate that in some areas they might want to have to make tweaks for local circumstances.

It also fits in with the standardised report template that we produced a couple years ago.

We have got sort some capacity issues at the minute in the team. So we haven't been able to progress it for this year, but it is still something that I'm keen to do, hopefully for next year.

Date of next meeting

NT to arrange the next meeting for early September 2025.