



**North West Aggregate Working Party
Annual Monitoring Report 2015**

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The statistics and statements contained in this report are based on information from a large number of third party sources and are compiled to an appropriate level of accuracy and verification. Readers should use corroborative data before making major decisions based on this information.

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Executive Summary

The North West Aggregate Working Party (AWP) is one of nine similar working parties throughout England and Wales established in the 1970's. The membership of the North West AWP is detailed in Appendix 1.

This Annual Monitoring (AM) report provides sales and reserve data for the calendar year 1st January – 31st December 2014. The report provides data for each of the sub-regions in the North West:

- Cheshire East and Cheshire West and Chester
- Cumbria
- Greater Manchester, Merseyside and Warrington
- Lancashire

The North West AWP is not a policy-making body, but is charged with data collection to facilitate planning by Mineral Planning Authorities (MPAs), national government agencies and the industry, and to inform the general reader.

Crushed Rock

- Total Crushed Rock Sales of 6.18mt up 24% on 2013 figures.
- Total Crushed Rock Reserves of 283.21mt up 2.7% on 2013 figures.

Land-won Sand and Gravel

- Total Land-won Sand and Gravel Sales of 3.43mt up 79.6% on 2013 figures.
- Total Land-won Sand and Gravel Reserves of 40.31mt up 10.8% on 2013 figures.

Landings of Marine-dredged Sand and Gravel

- Total Marine-dredged Sand and Gravel removed was down by 0.33mt, a 39.4% reduction on 2013 figures.
- Landing of Marine-dredged Sand and Gravel was down 0.10mt, a 34.6% reduction on 2013 figures.

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1. Introduction

- 1.1. This Annual Monitoring Report (AM2014) for the North West Aggregate Working Party (AWP) has been prepared from returns made by the operators of quarries, wharves and rail depots in the North West in response to a party wide survey. The report also puts the findings in the context of the National Planning Policy Framework and the Guidance on the Managed Aggregates Supply System.

Background

- 1.2. The AWP¹ were established in the 1970s to collect and monitor data on aggregates provision as an aid to minerals planning. AWP are joint local government-central government-industry bodies that monitor the supply of, demand for, and reserves of, all aggregates including both primary aggregate and alternative sources in local authority areas. They also consider the implications of supply to, and from, these areas. They are not policy-making bodies, but provide information to facilitate the work of Mineral Planning Authorities (MPAs), national government agencies and the minerals industry. They also feed regional views to the Government through the national forum, the National Coordinating Group (NCG).
- 1.3. The core functions of the AWP, as set out in the Planning Practice Guidance, are to:
- consider, scrutinise and provide advice on the Local Aggregate Assessments of each mineral planning authority in its area;
 - provide an assessment of the position of overall demand and supply for the Aggregate Working Party area; and
 - obtain, collect and report on data on minerals activity in their area.
- 1.4. The AWP operate under contracts between the Secretary of State for Communities and Local Government and the Chairs of the AWP, and receive funding from the Department to prepare papers, reports, and data collations as recommended by the NCG.

¹ Previously known as Regional Aggregate Working Parties but has now changed to reflect national guidelines.

- 1.5. The North West Aggregates Working Party (NWAWP) comprises the following sub-regions:
- Cheshire East and Cheshire West and Chester
 - Cumbria
 - Greater Manchester, Merseyside and Warrington
 - Lancashire
- 1.6. In 2014 the Chairman of the NWAWP changed when Louise Hilder of Cheshire West and Chester stepped down at the December meeting. Following a vote, Carolyn Williams, Group Leader Minerals and Waste representing AGMA, was elected as her replacement. The AWP is also serviced by a Technical Secretary, who for 2014 was Natalie Durney-Knight from Cheshire West and Chester. The membership of the North West AWP for 2014 is set out in Appendix 1. The main matters that the North West AWP considered at the AWP meetings held in 2014 are set out in Appendix 2.

Planning Policy

The National Planning Policy Framework

- 1.7. The NPPF requires MPAs to make provision for a steady and adequate supply of minerals; to define mineral safeguarding areas; to safeguard wharves, rail heads and certain aggregate processing facilities and plant.
- 1.8. The NPPF requires MPAs to participate in an Aggregates Working Party (AWP); to prepare an annual Local Aggregates Assessment (LAA); to make provision for the land won or other elements of their LAA in their mineral plans, taking account of the advice of the AWP and the National Aggregate Coordinating Group (NCG) as appropriate.

Guidance on the Managed Aggregate Supply System (MASS)

- 1.9. AWP's are to produce an annual report on minerals activity in their area, provide technical advice to MPAs on the adequacy of a LAA, and provide an assessment on the position of overall demand and supply in its area, including whether, in its view, the area is making a full contribution towards meeting both national and local needs.

National and Regional Guidelines for Aggregates Provision 2009

- 1.10. The most recent National and Sub National Guidelines are the National and Regional Guidelines for Aggregates Provision in England 2005-2020 published on 29 June 2009. The levels of provision set out in the Guidelines are summarised in Table 1.1 below.

Table 1.1: National and Regional Guidelines for Aggregates Provision in England, 2005 – 2020 (Mt)

| New Regions Mt. | Guidelines for land-won production in Region | | Assumptions | | |
|-----------------------------------|--|-----------------------|----------------------|---------------------------|------------------------|
| | Land-won Sand & Gravel | Land-won Crushed Rock | Marine Sand & Gravel | Alternative Materials (a) | Net Imports to England |
| South East England | 195 | 25 | 121 | 130 | 31 |
| London | 18 | 0 | 72 | 95 | 12 |
| East of England | 236 | 8 | 14 | 117 | 7 |
| East Midlands | 174 | 500 | 0 | 110 | 0 |
| West Midlands | 165 | 82 | 0 | 100 | 23 |
| South West | 85 | 412 | 12 | 142 | 5 |
| North West | 52 | 154 | 15 | 117 | 55 |
| Yorkshire & the Humber | 78 | 212 | 5 | 133 | 3 |
| North East | 24 | 99 | 20 | 50 | 0 |
| ENGLAND | 1028 | 1492 | 259 | 993 | 136 |

Report Scope

- 1.11. Data on primary aggregates sales from land-won sand and gravel sites, wharves and rail depots for 2014 has been provided by operators to their respective Minerals Planning Authority (MPA). The MPA then forwarded responses to the AWP technical secretary. An inventory of quarries and wharves and planning decisions is provided within each section. In order to provide an indication of trends, this Annual Report compares data from 2014 with data for earlier years.

- 1.12. The planning context for this report is the National Planning Policy Framework² (NPPF) and Guidance on the Managed Aggregate Supply System³ at the national level, and adopted Local Plans as the overall strategic plan for the area.

² National Planning Policy Framework, DCLG March 2012

³ Guidance on the Managed Aggregate Supply System, DCLG October 2012

2. Development Plans

- 2.1. All of the MPAs in the North West have adopted plans (or saved polices) related to minerals planning as set out below.

Cheshire East

- 2.2. The Council submitted its Local Plan Strategy (LPS) to the Secretary of State for Communities and Local Government on 20th May 2014 to undergo an independent examination to determine whether it is sound and legally compliant. Hearing sessions commenced in September 2014, with the hearing sessions being adjourned in October 2014. The Inspector issued his interim views in early November 2014 on the legal compliance and soundness of the submitted Cheshire East Local Plan Strategy on the basis of the evidence and discussions during the examination.
- 2.3. After receiving and considering the Inspector's interim views, the Council requested the formal suspension of the LPS examination in November 2014 to undertake additional work to address the Inspector's concerns.
- 2.4. The submitted LPS (2014) contains a Strategic Minerals policy (SE 10), with detailed Development Management criteria/policy and Site Allocations to form part of the Site Allocations and Development Management Policies Development Plan Document.

Cheshire West and Chester

- 2.5. The Local Plan (Part One) Strategic Policies was adopted on 29th January 2015. The Local Plan (Part Two) Land Allocations and Detailed Policies is currently being prepared and consultation on policy directions (including minerals policies and sites) is anticipated to be in Summer 2016.

Cumbria

- 2.6. Cumbria is working to prepare a Minerals and Waste Local Plan (MWLP). The first draft of the Cumbria MWLP in 2013 was, to all intents and purposes, a partial review of the adopted Core Strategy and Development Control Policies documents, whilst it also built on the withdrawn draft Site Allocations Policies. This was redrafted during 2014 and has, in some topic areas, changed significantly from the February 2013 draft and/or

from the adopted MWDF documents. Consultation on the redraft was in Spring 2015 with consultation on the Regulation 19 MWLP expected in 2016.

Greater Manchester

- 2.7. The Greater Manchester Joint Minerals Plan was adopted by the 10 Authorities of Greater Manchester on 26th April 2013. Currently there are no plans to update or review the plan.

Merseyside

- 2.8. Within Merseyside the Minerals Authorities for Halton, Knowsley and St Helens have adopted core strategies and are currently considering the next stage of local plan development.
- 2.9. Liverpool is currently preparing a local plan which is aimed to be adopted by late 2017. Sefton has completed its Local Plan examination in public and the Inspector has found the Plan sound, pending consultation on modifications. The Wirral Local Plan is working towards the Publication stage and adoption is expected in early 2017

Warrington

- 2.10. The Warrington Local Plan Core Strategy (LPCS) was adopted in July 2014. Currently there are no plans to update or review the plan.

Lancashire

- 2.11. Lancashire County Council Core Strategy for future minerals and waste development is set out in their Core Strategy Development Plan which was adopted in March 2009 and runs until 2021. The County Council is currently reviewing their adopted Minerals and Waste Local Plan (the adopted Core strategy and the adopted Site allocation and development management policies local plan). In October-December 2014 the Joint Authorities consulted on the scope of a review of the local plan.

3. North West

3.1. Tables 3.1 to 3.4 provide an overview of sales, reserve and landbank figures for aggregate land-won crushed rock and sand and gravel across the north west region covering the period 1 January to 31 December 2014.

Total aggregate sales, reserves and landbank

3.2. During the 2014 monitoring period total aggregate sales increased by 39.7 per cent from 6.88mt in 2013 to 9.61mt, bringing sales to their highest levels since 2008 and reducing the sales figure to 3.27mt below the annual guidelines⁴ for aggregate provision of 12.88mt. Total aggregate reserves increased by 3.6 per cent from 312.15mt as at 31 December 2013 to 323.52mt. This increase in reserves is due to increases in both reserves for sandstone and igneous rock and land-won sand and gravel.

3.3. The total aggregate landbank for the North West as at 31 December 2014 is 25.1 years, based on an annual requirement of 12.88mt of primary land-won aggregate as set out in the guidelines for aggregate provision.

Table 3.1 North West aggregate landbank as at 31 December 2014

| Aggregate | Landbank as at 31.12.2013 | Reserves as at 31.12.2014 | Annual apportionment requirement 2005-2020 | Landbank as at 31.12.2014 |
|---------------------------------|---------------------------|---------------------------|--|---------------------------|
| Crushed Rock | 28.7 years | 283.21 | 9.62mt | 29.4 years |
| Land-won sand and gravel | 11.2 years | 40.31 | 3.26mt | 12.3 years |
| Total aggregate landbank | 24.2 years | 323.52 | 12.88mt | 25.1 years |

Aggregate crushed rock sales, reserves and landbank

3.4. Sales of crushed rock aggregate increased by 24.3 per cent from 4.97mt in 2013 to 6.18mt, the highest recorded sales figure since 2010. Both limestone and sandstone sales increased by 19.7 per cent and 42.5 per cent respectively. High Specification Aggregate (HSA) sales fell for a third year running by 7.3 per cent from 0.41mt during 2013 to 0.38mt.

3.5. Total reserves of crushed rock aggregate increased by 2.7 per cent from 275.76mt in 2013 to 283.21mt at 31 December 2014. Reserves of limestone fell by 12.79mt which is

⁴ National and regional guidelines for aggregate provision in England 2005 - 2020, Communities and Local Government, June 2009

9.08mt greater than expected based on sales. This was due to a reduction in the limestone landbanks in Cumbria and Lancashire. The fall in reserves of High Specification Aggregate (HSA) was 0.55mt which is 0.17mt greater than sales. Sandstone and igneous rock reserves increased by 19.7 per cent from 36.39mt to due to a number of permissions being granted during 2014.

- 3.6. The crushed rock landbank for the North West as at 31 December 2014 was 29.4 years, far in excess of the minimum 10 year requirement. Landbanks for the sub-regions are detailed in the individual chapters.

Aggregate sand and gravel sales, reserves and landbank

- 3.7. Sales of land-won aggregate sand and gravel increased significantly by 79.6 per cent from 1.91mt in 2013 to 3.43mt in 2014. This is the highest figure for more than 10 years. This increase is due to increase in sales of land-won sand and gravel across each sub-region within the North West. Sales of Marine dredge aggregate sand and gravel have fallen during 2014 as land-won has risen.
- 3.8. Reserves of land-won aggregate sand and gravel also increased by 10.8 per cent from 36.39mt in 2013 to 40.31mt as at 31 December 2014. This increase is due a significant increase in Cheshire East reserve following the granting of a quarry extension during 2014. The sand and gravel landbank for the North West as at 31 December 2014 was 12.3 years, an increase of just over a year from 11.2 years at the end of the 2013 monitoring period. Landbanks for the sub-regions are detailed in the individual chapters.

Table 3.2: North West land-won aggregate sales 2004-2014 (million tonnes)

| Monitoring Period | 2004 | 2005 | 2006 | 2007 | 2008 | 2009 | 2010 | 2011 | 2012 | 2013 | 2014 |
|--|--------------|--------------|--------------|--------------|--------------|-------------|-------------|-------------|-------------|-------------|-------------|
| Aggregate Crushed Rock Sales | | | | | | | | | | | |
| Limestone | 5.50 | 5.10 | 5.30 | 5.80 | 5.18 | 3.77 | 4.05 | 3.39 | 3.53 | 3.10 | 3.71 |
| Sandstone and igneous rock | 3.95 | 2.79 | 2.86 | 2.92 | 2.09 | 1.34 | 1.63 | 1.29 | 1.72 | 1.46 | 2.08 |
| High Specification Aggregate (HAS) | - | 0.74 | 0.69 | 0.70 | 0.75 | 0.78 | 0.59 | 0.60 | 0.55 | 0.41 | 0.38 |
| Total Crushed Rock Sales | 9.45 | 8.63 | 8.85 | 9.42 | 8.02 | 5.89 | 6.27 | 5.28 | 5.80 | 4.97 | 6.18 |
| Aggregate Sand and Gravel Sales | | | | | | | | | | | |
| Land-won sand and gravel | 2.84 | 3.06 | 2.97 | 3.00 | 2.69 | 2.18 | 2.29 | 1.87 | 2.01 | 1.91 | 3.43 |
| Total sand and gravel sales | 2.84 | 3.06 | 2.97 | 3.00 | 2.69 | 2.18 | 2.29 | 1.87 | 2.01 | 1.91 | 3.43 |
| Total Aggregate Sales | 12.29 | 11.69 | 11.82 | 12.42 | 10.71 | 8.07 | 8.56 | 7.15 | 7.81 | 6.88 | 9.61 |

Table 3.3: North West land-won aggregate reserves 2004-2014 (million tonnes)

| Monitoring Period | 2004 | 2005 | 2006 | 2007 | 2008 | 2009 | 2010 | 2011 | 2012 | 2013 | 2014 |
|--|---------------|---------------|---------------|---------------|---------------|---------------|---------------|---------------|---------------|---------------|---------------|
| Aggregate Crushed Rock Reserves | | | | | | | | | | | |
| Limestone | 150.80 | 148.20 | 174.70 | 173.90 | 162.65 | 171.53 | 175.40 | 166.30 | 160.20 | 158.33 | 145.54 |
| Sandstone and igneous rock | 168.40 | 143.10 | 155.30 | 153.20 | 141.10 | 138.60 | 153.30 | 115.36 | 119.20 | 105.90 | 126.73 |
| High Specification Aggregate (HAS) | - | 9.85 | 9.55 | 19.00 | 18.20 | 17.26 | 13.16 | 13.80 | 13.70 | 11.53 | 10.98 |
| Total Crushed Rock Reserves | 319.20 | 301.20 | 339.60 | 346.10 | 321.95 | 327.39 | 341.86 | 295.46 | 293.10 | 275.76 | 283.21 |
| Aggregate Land-won Sand and Gravel Reserves | | | | | | | | | | | |
| Land-won sand and gravel | 39.24 | 43.02 | 45.59 | 38.70 | 45.97 | 41.77 | 36.17 | 35.33 | 38.61 | 36.39 | 40.31 |
| Total sand and gravel reserves | 39.24 | 43.02 | 45.59 | 38.70 | 45.97 | 41.77 | 36.17 | 35.33 | 38.61 | 36.39 | 40.31 |
| Total Aggregate Reserves | 358.60 | 343.50 | 385.10 | 384.80 | 367.88 | 369.16 | 378.03 | 330.79 | 331.71 | 312.15 | 323.52 |

4. Cheshire East and Cheshire West and Chester

- 4.1. Since the 2010 monitoring period, data has been collected for the two separate sub-regions of Cheshire East and Cheshire West and Chester. The result of this monitoring is being reported together to enable analysis of ten year supply patterns. The two sub-regions will be reported separately when sufficient data has been gathered. It should be noted that Cheshire West and Chester does not have any permitted crushed rock aggregate reserves and therefore analysis relates solely on Cheshire East for this aggregate.

Aggregate crushed rock sales, reserves and landbank

- 4.2. Sales of aggregate land-won crushed rock from Cheshire East remained unchanged for the fifth consecutive monitoring period. Sales from the sub-region are consistently very low as the material is of a relatively low grade and is largely utilised as dressing stone, aggregate production is a by-product of the main uses. Reserves of aggregate crushed rock have increased, due to a permitted quarry extension, from 4.29mt to 4.9mt as at 31 December 2014 providing for a landbank of 122.5 years. This large landbank should be treated with caution due to the lack of firm data relating to the proportion of aggregate in total reserves and the nature of the material produced.

Table 4.1: Cheshire East aggregate crushed rock Landbank as at 31 December 2014

| | Landbank as at 31.12.2013 | Reserves as at 31.12.2014 | Annual apportionment requirement 2005-2020 | Landbank as at 31.12.2014 |
|---------------|--------------------------------------|--------------------------------------|---|--------------------------------------|
| Cheshire East | 107.25 years | 4.9mt | 0.04mt | 122.5years |

Aggregate sand and gravel sales, reserves and landbank Cheshire East

- 4.3. Sales of land-won aggregate sand and gravel in Cheshire East have increased dramatically by 307 per cent from 0.41mt in 2013 to 1.67mt. Due to the relatively new monitoring regime for the former Cheshire sub-region it is not possible to monitor any long-term sales pattern for Cheshire East. Reserves of sand and gravel increased by 176 percent from 5.17mt to 14.31mt as at 31 December 2014 due to a quarry extension being granted. The significant increase in sales has been offset by the permitted quarry extension and so the landbank at 31 December 2014 was 20.15 years. This significantly above the minimum seven year requirement expressed in the NPPF. However, it should

be noted that the exact proportion of aggregate reserves, as part of larger reserves of industrial sand, is not known and therefore provision fluctuates in response to demand year on year. This will need to be continually reviewed in future Annual Monitoring Reports and Local Aggregate Assessments.

Aggregate sand and gravel sales, reserves and landbank Cheshire West and Chester

- 4.4. Sales of land-won aggregate sand and gravel in Cheshire West and Chester remained steady during the 2014 monitoring period at 0.42mt. As with Cheshire East, due to the short-term nature of monitoring for Cheshire West and Chester, it is not possible to assess any established pattern, future monitoring will provide the opportunity to do this. Reserves of sand and gravel decreased by 44.1 per cent from 8.4mt as at 31 December 2013 to 4.7mt. This significant drop in reserve is due to the consolidation of two quarries which included the surrender of 5mt of sand and gravel and provision of limited new reserves. The landbank for sand and gravel as at 31 December 2014 was 5.88 years compared to 11.1 years at the end of 2013 monitoring period. This figure is below the minimum seven year requirement set out in the NPPF.

Table 4.2: Cheshire aggregates land-won sand and gravel landbanks as at 31 December 2014

| | Landbank as at 31.12.2013 | Reserves as at 31.12.2014 | Annual apportionment requirement 2005-2020 | Landbank as at 31.12.2014 |
|---------------------------|----------------------------------|----------------------------------|---|----------------------------------|
| Cheshire East | 7.28 years | 14.31mt | 0.71mt | 20.15 years |
| Cheshire West and Chester | 10.5 years | 4.70mt | 0.80mt | 5.88 years |

Table 4.3 Cheshire aggregate crushed rock sales and reserves 2004 to 2014 (million tonnes)

| Monitoring Period | 2004 | 2005 | 2006 | 2007 | 2008 | 2009 | 2010 | 2011 | 2012 | 2013 | 2014 |
|---|------|------|------|------|------|-------|-------|-------|-------|-------|-------|
| Aggregate Crushed Rock Sales | | | | | | | | | | | |
| Cheshire ⁵ | 0.05 | 0.03 | 0.05 | 0.03 | 0.02 | 0.001 | - | - | - | - | - |
| Cheshire East ⁶ | - | - | - | - | - | - | 0.001 | 0.001 | 0.001 | 0.001 | 0.001 |
| Cheshire West and Chester (no permitted reserves) | - | - | - | - | - | - | - | - | - | - | - |
| Total aggregate crushed rock sales | 0.05 | 0.03 | 0.05 | 0.03 | 0.02 | 0.001 | 0.001 | 0.001 | 0.001 | 0.001 | 0.001 |
| Aggregate Crushed Rock Reserves | | | | | | | | | | | |
| Cheshire ⁴ | 5.4 | 5.4 | 5.35 | 5.52 | 5.6 | 4.42 | - | - | - | - | - |
| Cheshire East ⁵ | - | - | - | - | - | - | 4.29 | 4.29 | 4.29 | 4.29 | 4.90 |
| Cheshire West and Chester ⁶ | - | - | - | - | - | - | - | - | - | - | - |
| Total aggregate crushed rock Reserves | 5.4 | 5.4 | 5.35 | 5.52 | 5.6 | 4.42 | 4.29 | 4.29 | 4.29 | 4.29 | 4.9 |

⁵ Former Cheshire County Council Area monitored AM95 to AM09

⁶ Monitored AM10 onwards

Table 4.4: Cheshire aggregate sand and gravel sales and reserves 2004 to 2014

| Monitoring Period | 2004 | 2005 | 2006 | 2007 | 2008 | 2009 | 2010 | 2011 | 2012 | 2013 | 2014 |
|--|------|-------|------|-------|------|-------|------|------|------|-------|-------|
| Aggregate Land-won Sand and Gravel Sales | | | | | | | | | | | |
| Cheshire | 1.1 | 1.58 | 1.44 | 1.51 | 1.17 | 0.87 | - | - | - | - | - |
| Cheshire East | - | - | - | - | - | - | 0.42 | 0.26 | 0.40 | 0.41 | 1.67 |
| Cheshire West and Chester | - | - | - | - | - | - | 0.54 | 0.66 | 0.56 | 0.42 | 0.42 |
| Total Aggregate Land-won Sand and Gravel Sales | 1.1 | 1.58 | 1.44 | 1.51 | 1.17 | 0.87 | 0.96 | 0.92 | 0.96 | 0.83 | 2.09 |
| Aggregate Land-won Sand and Gravel Reserves | | | | | | | | | | | |
| Cheshire | 19.2 | 20.53 | 21.3 | 19.52 | 16.4 | 12.76 | - | - | - | - | - |
| Cheshire East | - | - | - | - | - | - | 1.75 | 5.6 | 5.59 | 5.17 | 14.31 |
| Cheshire West and Chester | - | - | - | - | - | - | 4.42 | 4.3 | 9.31 | 8.4 | 4.7 |
| Total Aggregate Land-won Sand and Gravel Reserves | 19.2 | 20.53 | 21.3 | 19.52 | 16.4 | 12.76 | 6.17 | 9.9 | 14.9 | 13.57 | 19.01 |

Table 4.5: Cheshire aggregate sites surveyed 2014

| Site name | Company | Grid Ref | Mineral | Status | MPA | MPA/BAA |
|---------------------------------|--------------------------------------|------------|-------------|----------|-----------------------------------|--------------------|
| Arclid Quarry | Bathgate Silica Sand | SJ 783 613 | Silica Sand | Active | Cheshire East Council | MPA ⁽¹⁾ |
| Bent Farm Quarry | Sibelco UK | SJ 831 619 | Silica Sand | Active | Cheshire East Council | MPA |
| Cherry Orchard Sand Unit | Cherry Orchard Sand Unit | SJ 568 680 | Sand | Closed | Cheshire West and Chester Council | |
| Cheshire Sands ⁽²⁾ | Lafarge Tarmac Limited | SJ 572 699 | Sand | Active | Cheshire West and Chester Council | MPA |
| Cobden Farm | Lafarge Tarmac Limited | SJ 587 673 | Sand | Inactive | Cheshire West and Chester Council | MPA |
| Dingle Bank Quarry | Sibelco UK | SJ 832 714 | Silica Sand | Active | Cheshire East Council | MPA |
| Eaton Hall Quarry | Lafarge Tarmac Limited | SJ 860 655 | Silica Sand | Active | Cheshire East Council | MPA |
| Endon Quarry | Park Skip Hire | SJ 940 763 | Sandstone | Active | Cheshire East Council | |
| Forest Hill Quarry | CEMEX UK Material Limited | SJ 612 714 | Sand | Active | Cheshire West and Chester Council | MPA |
| Fourways | Lafarge Tarmac Limited | SJ 577 690 | Sand | Closed | Cheshire West and Chester Council | MPA |
| Gawsworth Quarry | O'Gara Developments | SJ 919 679 | Sandstone | Inactive | Cheshire East Council | |
| Lee Hills Quarry | Lee Hills Quarry | SJ 928 691 | Sandstone | Inactive | Cheshire East Council | |
| Marksend Quarry | A.M & D Earl | SJ 941 757 | Sandstone | Active | Cheshire East Council | |
| Mere Farm Quarry | Hanson Quarry Product Europe Limited | SJ 825 746 | Sand | Active | Cheshire East Council | MPA |
| Rough Hey Quarry | O'Gara Developments | SJ 923 682 | Sandstone | Inactive | Cheshire East Council | |
| Sycamore Quarry | A.M & D Earl | SJ 939 766 | Sandstone | Active | Cheshire East Council | |
| Town Farm Quarry ⁽³⁾ | Marchington Stone Limited | SJ 565 735 | Sand | Active | Cheshire West and Chester Council | MPA |

1. Also Members of SAMSA (Silica and Moulding Sands Association)

2. Incorporates Crown Farm and Delamere Quarries

3. Extraction ceased in March 2014 and site is now closed for the purposes of sand extraction.

Monitoring of planning applications

Table 4.6: Planning applications for primary aggregate extraction determined between 1 January and 31 December 2014

| | Aggregate crushed rock | | | Land-won aggregate sand and gravel | | |
|---------------------------|------------------------|--------------|---------------------|------------------------------------|--------------|---------------------|
| | Granted (mt) | Refused (mt) | No. of applications | Granted (mt) | Refused (mt) | No. of applications |
| Cheshire East | - | - | - | - | - | - |
| Cheshire West and Chester | - | - | - | 0.64 | - | 1 |
| Total | - | - | - | 0.64 | - | 1 |

Table 4.7: Planning applications for primary aggregate extraction pending as at 31 December 2014

| | Aggregate crushed rock | | Land-won aggregate sand and gravel | |
|---------------------------|------------------------|---------------------|------------------------------------|---------------------|
| | Resource (mt) | No. of applications | Resource (mt) | No. of applications |
| Cheshire East | - | - | - | - |
| Cheshire West and Chester | - | - | - | - |
| Total | - | - | - | - |

Table 4.8: Planning application details for primary aggregate extraction determined and pending 1 January to 31 December 2014

| MPA | Site | Applicant | Application No. | Mineral | Area of Application (ha) | Resource (mt) | Extension/new quarry | Decision/data |
|---------------------------|-------------|-----------|-----------------|---------|--------------------------|---------------|----------------------|---------------|
| Cheshire West and Chester | Forest Hill | Cemex UK | 13/03715/MIN | Sand | 14.02 | 0.64mt | Extension | Approved |

Table 4.9: Environment Act 1995 - summary of aggregate mineral review sites as at 31 December 2014

| MPA | Original | Lapsed | Submitted | Determined | With Sos | High Court |
|-----------------------------------|-----------------|---------------|------------------|-------------------|-----------------|-------------------|
| Phase I | | | | | | |
| Cheshire East Council | 6 | - | 2 | 6 | - | - |
| Cheshire West and Chester Council | 1 | - | - | 1 | - | - |
| Phase II | | | | | | |
| Cheshire East Council | 1 | - | - | 1 | - | - |
| Cheshire West and Chester Council | - | - | - | - | - | - |
| Dormant | | | | | | |
| Cheshire East Council | 7 | | - | 1 | | |
| Cheshire West and Chester Council | | | - | - | | |

5. Cumbria

5.1. For the purposes of annual monitoring, the Lake District National Park is included within the Cumbria sub-region. Landbank figures within this monitoring report are calculated using the most up to date apportionment figures. It should however be noted that Cumbria objected to this apportionment and therefore landbanks identified within this report do not reflect the landbank reported in the 'Cumbria and the Lake District National Park Second Joint Annual Local Aggregate Assessment 2014'.

Aggregate crushed rock sales, reserves and landbank

5.2. Total sales of aggregate crushed rock increased during the 2014 monitoring period by 7.5 per cent from 2.40mt in 2013 to 2.58mt. Sales of High Specification Aggregate (HSA) fell by 7.4 per cent alongside a fall in sales of sandstone and igneous rock of 19.9 per cent. Sales of Limestone have increased from 1.62mt in 2013 to 1.9mt as at 31st December 2014 continuing the fluctuation of recent years suggesting an unstable demand for this resource.

5.3. Recorded reserves of crushed rock aggregate increased during the monitoring period by 13.2 per cent from 121.03mt as 31 December 2013 to 137.06mt. Reserves of sandstone and igneous rock (non HSA) increased steeply by 188 per cent from 10.33mt as at 31 December 2013 to 29.82mt. This significant rise in reserves is due to an extension permitted at Roosecote Quarry in June 2014. Reserves of HSA fell by 4.8 per cent from 11.53mt as 31 December 2013 to 10.98mt. Limestone reserves fell by 2.9 per cent from 99.17mt in 2013 to 96.26mt

5.4. The crushed rock landbank increased to 34.09 years as at 31 December 2014, a return to the 2012 level when a landbank of 34 years was recorded. This is significantly higher than the 10 year requirement set out in the NPPF.

Table 5.1: Cumbria aggregate crushed rock Landbank as at 31st December 2014

| | Landbank as at 31.12.2013 | Reserves as at 31.12.2014 | Annual apportionment requirement 2005-2020 | Landbank as at 31.12.2014 |
|---------|------------------------------|------------------------------|---|------------------------------|
| Cumbria | 30.12 years | 137.06mt | 4.02mt | 34.09 years |

Aggregate sand and gravel sales, reserves and landbank

- 5.5. Total sales of aggregate sand and gravel increased during 2014 by 42.8 per cent from 0.49mt in 2013 to 0.7mt. This significant increase is due to an upturn in sales of land-won aggregate sand and gravel from 0.48mt in 2013 to 0.68mt and landings of marine dredged sand and gravel from 0.1mt in 2013 to 0.2mt.
- 5.6. Reserves of aggregate land-won sand and gravel fell by 6.9 per cent from 9.89mt as at 31 December 2013 to 9.2mt. The landbank for aggregate land-won sand and gravel has reduced slightly during the monitoring period from 12.24 years as at 31 December 2013 to 10.45 years. This remains in excess of the minimum seven year requirement set out in the NPPF.

Table 5.2: Cumbria aggregate land-won sand and gravel Landbank as at 31st December 2014

| | Landbank as at 31.12.2013 | Reserves as at 31.12.2014 | Annual apportionment requirement 2005-2020 | Landbank as at 31.12.2014 |
|---------|----------------------------------|----------------------------------|---|----------------------------------|
| Cumbria | 12.24 years | 9.2mt | 0.88mt | 10.45 years |

Table 5.3: Cumbria aggregate crushed rock sales and reserves 2004-2014

| Monitoring Period | 2004 | 2005 | 2006 | 2007 | 2008 | 2009 | 2010 | 2011 | 2012 | 2013 | 2014 |
|--|--------------|--------------|--------------|--------------|--------------|--------------|--------------|--------------|--------------|---------------|---------------|
| Aggregate Crushed Rock Sales | | | | | | | | | | | |
| Limestone | 2.8 | 2.6 | 2.7 | 2.8 | 2.7 | 1.91 | 2.46 | 1.84 | 2.03 | 1.62 | 1.9 |
| Sandstone and igneous rock | 1.1 | 0.36 | 0.27 | 0.53 | 0.4 | 0.38 | 0.41 | 0.37 | 0.37 | 0.37 | 0.3 |
| High Specification Aggregate (HAS) | - | 0.74 | 0.69 | 0.7 | 0.72 | 0.78 | 0.59 | 0.6 | 0.55 | 0.41 | 0.38 |
| Total sales | 3.9 | 3.7 | 3.66 | 4.0 | 3.58 | 3.07 | 3.46 | 2.81 | 2.95 | 2.4 | 2.58 |
| Aggregate Crushed Rock Reserves | | | | | | | | | | | |
| Limestone | 96.1 | 97.9 | 97.7 | 102.5 | 110.05 | 103.9 | 109.8 | 103.8 | 99.56 | 99.17 | 96.26 |
| Sandstone | 60.9 | 48.85 | 49.2 | 48.69 | 47.75 | 47.81 | 47.36 | 24.81 | 23.41 | 10.33 | 29.82 |
| High Specification Aggregate (HAS) | - | 9.85 | 9.55 | 19.0 | 18.2 | 17.26 | 13.16 | 13.81 | 13.77 | 11.53 | 10.98 |
| Total reserves | 157.0 | 156.6 | 156.5 | 170.2 | 186.7 | 168.9 | 170.3 | 142.4 | 136.7 | 121.03 | 137.06 |

Table 5.4: Cumbria aggregate sand and gravel sales and reserves 2004-2014

| Monitoring Period | 2004 | 2005 | 2006 | 2007 | 2008 | 2009 | 2010 | 2011 | 2012 | 2013 | 2014 |
|--|-------------|-------------|-------------|-------------|--------------|--------------|--------------|-------------|--------------|-------------|------------|
| Aggregate Sand and Gravel Sales | | | | | | | | | | | |
| Land-won aggregate sand and gravel | 0.8 | 0.7 | 0.79 | 0.87 | 0.77 | 0.52 | 0.53 | 0.46 | 0.46 | 0.48 | 0.68 |
| Marine dredged aggregate sand and gravel | 0.02 | 0.02 | 0.02 | 0.01 | 0.02 | 0.02 | 0.02 | 0.01 | 0.01 | 0.01 | 0.02 |
| Total aggregate sand and gravel sales | 0.82 | 0.72 | 0.81 | 0.88 | 0.79 | 0.54 | 0.55 | 0.47 | 0.47 | 0.49 | 0.7 |
| Aggregate Land-won Sand and Gravel Reserves | | | | | | | | | | | |
| Land-won aggregate sand and gravel | 10.5 | 9.18 | 9.19 | 8.67 | 13.47 | 13.95 | 11.48 | 11.1 | 10.59 | 9.89 | 9.2 |
| Total Aggregate land-won sand and gravel Reserves | 10.5 | 9.18 | 9.19 | 8.67 | 13.47 | 13.95 | 11.48 | 11.1 | 10.59 | 9.89 | 9.2 |

Table 5.5: Cumbria aggregate sites surveyed 2013

| Site name | Company | Grid Ref | Mineral | Status | MPA | MPA/BAA |
|-------------------------------|---|------------|---------------------|----------|---|---------|
| Bonnie Mount | J. E. A and S. M Burne | NY 548 313 | Sand | Active | Cumbria County Council | |
| Brockleworth Farm | Norbrook Laboratories | NY 348 551 | Sand | Active | Cumbria County Council | |
| Cardewmires Quarry | Thomas Armstrong Ltd | NY 343 505 | Sand and gravel | Active | Cumbria County Council | MPA |
| Derwent Howe Slag Bank | Thomas Armstrong Ltd | NX 985 285 | Slag | Active | Cumbria County Council | MPA |
| Elterwater Quarry | Burlington Slate Ltd | NY 324 048 | Secondary aggregate | Active | Lake District National Park Authority | |
| Eskett and Rowrah Quarries | Aggregate Industries UK | NY 054 167 | Limestone | Active | Cumbria County Council | MPA |
| Faugh No. 1 Sand Pit | Hanson Quarries Products Europe Limited | NY 512 552 | Sand | Inactive | Cumbria County Council | MPA |
| Faugh No. 2 Sand Pit | Eddie Wannop Limited | NY 512 552 | Sand | Active | Cumbria County Council | MPA |
| Flusco Quarry | Lakeland Minerals Limited | NY 464 293 | Limestone | Active | Cumbria County Council | |
| Ghyll Scaur Quarry | Aggregate Industries UK | SD 171 828 | Igneous Rock (HAS) | Active | Cumbria County Council | MPA |
| Goldmire Quarry | Neil Price Construction Service Limited | SD 219 739 | Limestone | Active | Cumbria County Council | |
| Hartley Quarry | CEMEX RMC (UK) Ltd | NY 787 083 | Limestone | Inactive | Cumbria County Council | MPA |
| Helbeck Quarry | Sherburn Stone Company Ltd | NY 799 158 | Limestone | Active | Cumbria County Council | BAA |
| High House Quarry (Highfield) | D A Harrision | NY 511 252 | Sand and gravel | Active | Cumbria County Council | |
| Holme Park Quarry | Aggregate Industries UK | SD 536 788 | Limestone | Active | Cumbria County Council | MPA |
| Holmescales Quarry | Aggregate Industries UK | SD 556 869 | Sandstone (HAS) | Inactive | Cumbria County Council | MPA |
| Kendal Fell Quarry | Mr Pennington | SD 502 925 | Limestone | Inactive | Cumbria County Council/ Lake District National Park Authority | |
| Kirkhouse Quarry | Lakeland Minerals Limited | NY 564 601 | Sand and gravel | Active | Cumbria County Council | |
| Low Gelt Quarry | Hanson Quarry Products Europe Limited | NY 512 552 | Sand | Active | Cumbria County Council | MPA |
| Low Plains | Lafarge Tarmac Limited | NY 490 410 | Sand and gravel | Active | Cumbria County Council | MPA |

| Site name | Company | Grid Ref | Mineral | Status | MPA | MPA/BAA |
|-------------------------------|---------------------------------------|------------|---|--------|---|---------|
| Moota Quarry | CEMEX RMC (UK) Ltd | NY 148 361 | Limestone | Active | Cumbria County Council | MPA |
| Overby No. 2 Sand Pit | Thomas Armstrong Limited | NY 125 470 | Sand | Active | Cumbria County Council | BAA |
| Peel Place Quarry | Tendley Quarries | SD 069 011 | Sand and Gravel | Active | Cumbria County Council | |
| Roan Edge Quarry | CEMEX RMC (UK) Ltd | SD 584 926 | Sandstone (HAS) | Active | Cumbria County Council | MPA |
| Roosecote Sand Pit | L & W Wilson (Endmoor) Ltd | SD 224 687 | Sand and gravel | Active | Cumbria County Council | |
| Sandside Quarry | Lafarge Tarmac Limited | SD 482 807 | Limestone | Active | Cumbria County Council | MPA |
| Shap Beck Quarry | Hanson Quarry Products Europe Limited | NY 550 181 | Limestone | Active | Extraction in Lake District National Park Authority | MPA |
| Shap Blue Quarry and Works | CEMEX (UK) Ltd | NY 564 106 | Igneous rock | Active | Extraction in Lake District National Park Authority | MPA |
| Shapfell Limestone Quarry | Tata Steel UK Limited | NY 587 138 | Limestone | Active | Cumbria County Council | |
| Silvertop Quarry | W & M Thompson (Quarries) Ltd | NY 586 602 | Limestone | Active | Cumbria County Council | |
| Snowhill Quarry No. 1 & No. 2 | Snowhill Quarries | SD 280 387 | Limestone (waste sold as secondary aggregate) | Active | Cumbria County Council | |
| Stainton Quarry | Lafarge Tarmac Limited | SD 246 729 | Limestone | Active | Cumbria County Council | MPA |
| Tendley Quarry | Tendley Quarry | NY 088 288 | Limestone | Active | Cumbria County Council | |

Monitoring of planning applications

Table 5.6: Planning Applications for primary aggregate extraction determined 1 January to 31 December 2014

| | Aggregate crushed rock | | | Land-won aggregate sand and gravel | | |
|--------------|------------------------|--------------|---------------------|------------------------------------|--------------|---------------------|
| | Granted (mt) | Refused (mt) | No. of applications | Granted (mt) | Refused (mt) | No. of applications |
| Cumbria CC | - | - | 1 | - | - | - |
| Total | - | - | 1 | - | - | - |

Table 5.7: Planning Applications for primary aggregate extraction pending as at 31 December 2014

| | Aggregate crushed rock | | Land-won aggregate sand and gravel | |
|--------------|------------------------|---------------------|------------------------------------|---------------------|
| | Resource (mt) | No. of applications | Resource (mt) | No. of applications |
| Cumbria CC | 0.52 | 1 | - | - |
| Total | 0.52 | 1 | - | - |

Table 5.8: Planning application details for primary aggregate extraction determined and pending 1 January to 31 December 2014

| MPA | Site | Applicant | Application No. | Mineral | Area of Application (ha) | Resource (mt) | Extension/new quarry | Decision/data |
|------------|-----------------|----------------------|-----------------|-----------|--------------------------|---------------|---------------------------------|---------------|
| Cumbria CC | Shapfell Quarry | Tata Steel | 3/08/9020 | Limestone | 25.8ha | 0.52 | Extension (deepening of quarry) | Pending |
| Cumbria CC | Roosecote | Holker States Co Ltd | 6/14/9004 | Sand | 2.6ha | 0.4 | Extension | Approved |

Table 5.9: Environment Act 1995 - summary of aggregate mineral review sites as at 31 December 2014

| MPA | Original | Lapsed | Submitted | Determined | With SoS | High Court |
|-----------------------|----------|--------|-----------|------------|----------|------------|
| Phase I | | | | | | |
| Cheshire East Council | 7 | - | - | 7 | - | - |
| Phase II | | | | | | |
| Cheshire East Council | 1 | - | - | - | - | - |
| Dormant | | | | | | |
| Cheshire East Council | 7 | | 1 | - | | |

6. Greater Manchester, Merseyside and Warrington

6.1. The metropolitan boroughs of Greater Manchester (Bolton, Bury, Manchester, Oldham, Rochdale, Salford, Tameside, Trafford and Wigan) are represented by the Minerals and Waste Planning Unit and the metropolitan boroughs of Merseyside (Knowsley, Liverpool City, Sefton, St Helens and Wirral) and Halton are represented by the Merseyside Environmental Advisory Service. Warrington deals with all mineral planning issues as an individual authority.

Aggregate crushed rock sales, reserves and landbank

6.2. Sales of aggregate crushed rock increased during the 2014 monitoring period by 64.2 per cent from 0.42mt in 2013 to 0.69mt. This varied sales figure is however in line with previous sales patterns experienced between 2008 and 2013 and is an indication of the current instability in the market.

6.3. Reserves of crushed rock aggregate increased by 4.3 per cent from 20.03mt as at 31 December 2013 to 21.18mt. The landbank as at 31 December 2014 also increased to 16.04 years from 15.40 years as at 31 December 2013 and remains in excess of the minimum 10 year requirement as expressed in the NPPF.

Table 6.1: Greater Manchester, Merseyside and Warrington aggregate crushed rock landbank as at 31st December 2014

| | Landbank as at 31.12.2013 | Reserves as at 31.12.2014 | Annual apportionment requirement 2005-2020 | Landbank as at 31.12.2014 |
|---|---------------------------|---------------------------|--|---------------------------|
| Greater Manchester, Merseyside and Warrington | 15.40 years | 21.18 mt | 1.32mt | 16.04 years |

Aggregate sand and gravel sales, reserves and landbank

6.4. Total sales of aggregate sand and gravel fell by 33 per cent during the monitoring period from 0.54mt in 2013 to 0.36mt. This decrease is due to a two thirds drop in landings of marine dredged sand and gravel from 0.3mt in 2013 to 0.1mt as at 31 December 2014. Sales of land-won aggregate sand and gravel have increased by 0.02mt following three years of steady output between 2011 and 2013.

6.5. Reserves of land-won sand and gravel fell by 9.7 per cent from 4.27mt to 3.86mt. The landbank for aggregate land-won sand and gravel also reduced by approximately 12

months to 8.97 years as at 31 December 2014. This remains in excess of the 7 year minimum requirement expressed in the NPPF and will continue to be monitored through both the North West AWP Annual Monitoring Reports and the sub-region's Local Aggregate Assessment.

Table 6.2: Greater Manchester, Merseyside and Warrington aggregate land-won sand and gravel landbank as at 31st December 2014

| | Landbank as at 31.12.2013 | Reserves as at 31.12.2014 | Annual apportionment requirement 2005-2020 | Landbank as at 31.12.2014 |
|---|----------------------------------|----------------------------------|---|----------------------------------|
| Greater Manchester, Merseyside and Warrington | 9.9 years | 3.86mt | 0.43mt | 8.97 years |

Table 6.3: Greater Manchester, Merseyside and Warrington aggregate crushed rock sales and reserves 2004-2014

| Monitoring Period | 2004 | 2005 | 2006 | 2007 | 2008 | 2009 | 2010 | 2011 | 2012 | 2013 | 2014 |
|--|-------|-------|-------|-------|-------|-------|-------|-------|-------|-------|-------|
| Aggregate Crushed Rock Sales | | | | | | | | | | | |
| Sandstone | 1.50 | 1.20 | 1.54 | 1.10 | 0.69 | 0.3 | 0.29 | 0.36 | 0.81 | 0.42 | 0.69 |
| Total aggregate crushed rock sales | 1.50 | 1.20 | 1.54 | 1.10 | 0.69 | 0.3 | 0.29 | 0.36 | 0.81 | 0.42 | 0.69 |
| Aggregate Crushed Rock Reserves | | | | | | | | | | | |
| Sandstone | 22.50 | 23.69 | 25.54 | 24.86 | 17.36 | 17.23 | 17.01 | 20.26 | 20.06 | 20.30 | 21.18 |
| Total aggregate crushed rock reserves | 22.50 | 23.69 | 25.54 | 24.86 | 17.36 | 17.23 | 17.01 | 20.26 | 20.06 | 20.30 | 21.18 |

Table 6.4: Greater Manchester, Merseyside and Warrington aggregate sand and gravel sales and reserves 2004-2014

| Monitoring Period | 2004 | 2005 | 2006 | 2007 | 2008 | 2009 | 2010 | 2011 | 2012 | 2013 | 2014 |
|--|------|------|------|------|------|------|------|------|------|------|------|
| Aggregate Sand and Gravel Sales | | | | | | | | | | | |
| Land-won aggregate sand and gravel | 0.50 | 0.40 | 0.40 | 0.30 | 0.44 | 0.37 | 0.22 | 0.24 | 0.24 | 0.24 | 0.26 |
| Marine dredged aggregate sand and gravel | 0.48 | 0.52 | 0.49 | 0.53 | 0.41 | 0.30 | 0.26 | 0.24 | 0.21 | 0.30 | 0.1 |
| Total aggregate sand and gravel sales | 0.98 | 0.92 | 0.89 | 0.83 | 0.85 | 0.67 | 0.48 | 0.48 | 0.45 | 0.54 | 0.36 |
| Aggregate Land-won Sand and Gravel Reserves | | | | | | | | | | | |
| Land-won aggregate sand and gravel | 6.30 | 8.91 | 9.89 | 5.15 | 5.80 | 6.10 | 4.85 | 4.76 | 4.52 | 4.27 | 3.86 |
| Total Aggregate land-won sand and gravel Reserves | 6.30 | 8.91 | 9.89 | 5.15 | 5.80 | 6.10 | 4.85 | 4.76 | 4.52 | 4.27 | 3.86 |

Table 6.5: Greater Manchester, Merseyside and Warrington aggregate sites and wharves surveyed 2014

| Name | Company | Grid Ref | Mineral | Status | MPA | MPA/BAA |
|------------------------------------|---------------------------------------|------------|--|-------------------------------------|--|---------|
| Sites | | | | | | |
| Astley Moss | Breedon Aggregates | SJ 371 500 | Sand and Gravel | Active | Salford City Council | MPA/BAA |
| Bold Heath Quarry | D Morgan Plc | SJ 530 885 | Sandstone | Active | St Helens Council | |
| Buckton Vale Quarry | W Maher & Sons | SD 992 016 | Sandstone | Inactive | Tameside Metropolitan Borough Council | MPA/BAA |
| Fletcher Bank Quarry | Marshalls Mono Ltd | SD 804 170 | Sandstone | Active | Bury Metropolitan Borough Council | MPA/BAA |
| Harrop Edge Quarry | Chartrange (Quarry Products) | SJ 982 959 | Sandstone | Inactive | Tameside Metropolitan Borough Council | |
| Harwood Quarry | Booth Ventures | SD 747 124 | Sandstone | Inactive (for aggregate extraction) | Bolton Council | |
| Montcliffe Quarry | Armstrongs Aggregates Ltd | SD 656 124 | Sandstone | Active | Bolton Council | |
| Morley's Hall Quarry | Casey | SJ 685 990 | Sand and gravel | Active | Wigan | |
| Offerton Quarry | Offerton Sand and Gravel | SJ 928 893 | Sand and Gravel | Closed ⁽¹⁾ | Stockport Metropolitan Borough Council | |
| Pilkington Quarry | Armstrongs Aggregates Ltd | SD 622 121 | Sandstone | Inactive | Bolton Council | |
| Southworth Quarry | Gaskell Bros (WM&C) Ltd | SJ 619 940 | Sandstone | Active | Warrington Borough Council | |
| Wharves | | | | | | |
| Garston Wharf | Hanson Quarry Products Europe Limited | SJ 397 837 | Sand | Active | Liverpool City Council | MPA |
| Mersey Wharf | | | Sand and gravel | Inactive | Wirral Metropolitan Borough Council | |
| Port of Liverpool (Seaforth Docks) | Aggregate Industries | SJ 313 967 | Crushed rock (imports from Glensanda Quarry) | Active | Sefton Metropolitan Borough Council | MPA |

1. Active for recycled aggregates

Monitoring of planning applications

Table 6.6: Planning Applications for primary aggregate extraction determined 1 January to 31 December 2014

| | Aggregate crushed rock | | | Land-won aggregate sand and gravel | | |
|--------------------|------------------------|--------------|---------------------|------------------------------------|--------------|---------------------|
| | Granted (mt) | Refused (mt) | No. of applications | Granted (mt) | Refused (mt) | No. of applications |
| Greater Manchester | - | - | - | - | - | - |
| Merseyside | - | - | - | - | - | - |
| Warrington | - | - | - | - | - | - |
| Total | - | - | - | - | - | - |

Table 6.7: Planning Applications for primary aggregate extraction pending as at 31 December 2014

| | Aggregate crushed rock | | Land-won aggregate sand and gravel | |
|--------------------|------------------------|---------------------|------------------------------------|---------------------|
| | Resource (mt) | No. of applications | Resource (mt) | No. of applications |
| Greater Manchester | 1.4 | 1 | - | - |
| Merseyside | - | - | - | - |
| Warrington | - | - | - | - |
| Total | 1.4 | 1 | - | - |

Table 6.8: Planning application details for primary aggregate extraction determined and pending 1 January to 31 December 2014

| MPA | Site | Applicant | Application No. | Mineral | Area of Application (ha) | Resource (mt) | Extension/new quarry | Decision/data |
|--------|------------|---------------------------|-----------------|-----------|--------------------------|---------------|----------------------|---------------|
| Bolton | Montcliffe | Armstrongs Aggregates Ltd | PC/93076/14 | Sandstone | 3.4 | 1.4 | Extension | Pending |

Table 6.9: Environment Act 1995 - summary of aggregate mineral review sites as at 31 December 2014

| MPA | Original | Lapsed | Submitted | Determined | With Sos | High Court |
|---|-----------------|---------------|------------------|-------------------|-----------------|-------------------|
| Phase I | | | | | | |
| Greater Manchester, Merseyside and Warrington | 10 | 5 | 1 | 4 | - | - |
| Phase II | | | | | | |
| Greater Manchester, Merseyside and Warrington | 1 | - | - | 1 | - | - |
| Dormant | | | | | | |
| Greater Manchester, Merseyside and Warrington | 18 | | - | 1 | | |

7. Lancashire

- 7.1. For the purposes of annual monitoring, the authorities of Blackpool and Blackburn with Darwen are included within the Lancashire sub-region.

Aggregate crushed rock sales, reserves and landbank

- 7.2. Sales of crushed rock aggregate increased during the monitoring period by 30.6 per cent from 2.15mt in 2013 to 2.81mt. The sales figure is however in line with previous sales patterns experienced between 2008 and 2013 and is an indication of the current instability in the market. The sales of sandstone increased by 47.7 per cent from 0.67mt in 2013 to 0.99mt, the highest figure since 2007. The sales of limestone increased by 22.2 per cent from 1.48mt in 2013 to 1.81mt, the highest figure since 2009.
- 7.3. Total crushed rock reserves fell by 7.8 per cent from 130.21mt as 31 December 2013 to 120.07mt, this is far in excess of the 2.81mt sold. This was due to the reserves of limestone falling by 9.88mt a 16.8 per cent reduction during 2014. The reserves of sandstone fell by 0.4 per cent in line with sales figures and new planning permissions. The landbank for crushed rock reduced during the 2014 monitoring period from 30.7 years as at 31 December 2013 to 28.3 years, this is however still in excess of the ten year minimum requirement set out in the NPPF.

Table 7.1: Lancashire aggregate crushed rock landbank as at 31st December 2014

| | Landbank as at 31.12.2013 | Reserves as at 31.12.2014 | Annual apportionment requirement 2005-2020 | Landbank as at 31.12.2014 |
|------------|---------------------------|---------------------------|--|---------------------------|
| Lancashire | 30.7 years | 120.07mt | 4.24mt | 28.3 years |

Aggregate sand and gravel sales, reserves and landbank

- 7.4. Land-won aggregate sand and gravel sales increased from 0.36mt as at 31 December 2013 to 0.48mt a 33.3 per cent increase. Sales have been relatively stable since 2005, apart from a decline in 2011, indicating a potential upturn in sales following a period of relative stability in the market for this material. Reserves of sand and gravel have increased by 0.7 per cent from 8.18mt as at 31 December 2013 to 8.24mt, this slight increase is due to an extension granted at Whinney Hill.

7.5. The landbank for aggregate sand and gravel increased slightly during the monitoring period from 18.6 years as at 31 December 2013 to 18.7 years, in line with the marginal increase in reserves. The landbank remains far in excess of the minimum seven year requirement expressed in the NPPF.

Table 7.2: Lancashire aggregate land-won sand and gravel landbank as at 31st December 2013

| | Landbank as at 31.12.2013 | Reserves as at 31.12.2014 | Annual apportionment requirement 2005-2020 | Landbank as at 31.12.2014 |
|------------|----------------------------------|----------------------------------|---|----------------------------------|
| Lancashire | 18.6 years | 8.24 mt | 0.44mt | 18.7 years |

Table 7.3: Lancashire aggregate crushed rock sales and reserves 2004-2014

| Monitoring Period | 2004 | 2005 | 2006 | 2007 | 2008 | 2009 | 2010 | 2011 | 2012 | 2013 | 2014 |
|--|--------------|---------------|--------------|--------------|---------------|---------------|---------------|--------------|--------------|---------------|---------------|
| Aggregate Crushed Rock Sales | | | | | | | | | | | |
| Limestone | 2.7 | 2.5 | 2.6 | 3.0 | 2.48 | 1.86 | 1.59 | 1.55 | 1.5 | 1.48 | 1.81 |
| Sandstone | 1.3 | 1.2 | 1.0 | 1.26 | 0.98 | 0.66 | 0.63 | 0.86 | 0.94 | 0.67 | 0.99 |
| Total aggregate crushed rock sales | 4.0 | 3.7 | 3.6 | 4.26 | 3.46 | 2.52 | 2.22 | 2.41 | 2.44 | 2.15 | 2.81 |
| Aggregate Crushed Rock Reserves | | | | | | | | | | | |
| Limestone | 54.7 | 50.32 | 77.0 | 71.4 | 52.6 | 67.63 | 65.61 | 62.5 | 60.64 | 59.16 | 49.28 |
| Sandstone | 79.8 | 64.5 | 75.1 | 74.1 | 70.35 | 69.14 | 67.63 | 66.0 | 71.42 | 71.05 | 70.83 |
| Total aggregate crushed rock reserves | 134.5 | 114.82 | 152.1 | 145.5 | 122.95 | 136.77 | 133.24 | 128.5 | 132.1 | 130.21 | 120.07 |

Table 7.4: Lancashire aggregate sand and gravel sales and reserves 2004-2014

| Monitoring Period | 2004 | 2005 | 2006 | 2007 | 2008 | 2009 | 2010 | 2011 | 2012 | 2013 | 2014 |
|--|-------------|------------|-------------|-------------|-------------|-------------|-------------|-------------|-------------|-------------|-------------|
| Aggregate Sand and Gravel Sales | | | | | | | | | | | |
| Land-won aggregate sand and gravel | 0.44 | 0.38 | 0.34 | 0.33 | 0.31 | 0.42 | 0.37 | 0.25 | 0.36 | 0.36 | 0.48 |
| Marine dredged aggregate sand and gravel | 0.1 | 0.12 | 0.1 | 0.12 | 0.01 | - | - | - | - | - | - |
| Total aggregate sand and gravel sales | 0.54 | 0.5 | 0.44 | 0.45 | 0.36 | 0.42 | 0.37 | 0.25 | 0.36 | 0.36 | 0.48 |
| Aggregate Land-won Sand and Gravel Reserves | | | | | | | | | | | |
| Land-won aggregate sand and gravel | 3.24 | 4.4 | 5.21 | 5.4 | 10.3 | 8.98 | 8.81 | 8.6 | 8.36 | 8.18 | 8.24 |
| Total Aggregate land-won sand and gravel Reserves | 3.24 | 4.4 | 5.21 | 5.4 | 10.3 | 8.98 | 8.81 | 8.6 | 8.36 | 8.18 | 8.24 |

Table 7.5: Lancashire aggregate sites surveyed 2014

| Name | Company | Grid Ref | Mineral | Status | MPA | MPA/BAA |
|--------------------------|----------------------------|------------|-------------------------------|----------|---------------------------|---------|
| Back Lane Quarry | Aggregate Industries UK | SD 510 695 | Limestone | Active | Lancashire County Council | MPA |
| Bankfield Quarry | Lafarge Tarmac Limited | SD 755 435 | Limestone | Active | Lancashire County Council | MPA |
| Bellman Quarry | Hanson Cement Ltd | SD 761 428 | Limestone | Active | Lancashire County Council | MPA |
| Bradley's Sand Pit | J A Jackson | SD 512 340 | Sand and gravel | Active | Lancashire County Council | |
| Brinscall Quarry | Hanson Aggregates | SD 633 421 | Sandstone | Active | Lancashire County Council | |
| Dalton Brickworks Quarry | Ibstock Brick Limited | SD 501 091 | Clay and shale ⁽¹⁾ | Active | Lancashire County Council | |
| Dunald Mill | Lafarge Tarmac Limited | SD 511 679 | Limestone | Active | Lancashire County Council | |
| Foreshore St Annes | William Rainford | SD 313 300 | Sand and gravel | Active | Lancashire County Council | |
| German Lane Quarry | P Casey Enviro Ltd | SD 562 171 | Sand | Inactive | Lancashire County Council | |
| Jamestone Quarry | Aggregate Industries UK | SD 758 233 | Sandstone | Active | Lancashire County Council | MPA |
| Lanehead | Lafarge Tarmac Limited | SD 752 437 | Limestone | Active | Lancashire County Council | MPA |
| Leapers Wood | Lafarge Tarmac Limited | SD 515 694 | Limestone | Active | Lancashire County Council | MPA |
| Leeming | Brown Bros (Longridge) Ltd | SD 683 406 | Limestone | Active | Lancashire County Council | |
| Lower Brockholes | Hargreaves | SD 578 304 | Sand and gravel | Active | Lancashire County Council | |
| Lydiat Lane Quarry | Wheale Limited | SD 554 239 | Sand and gravel | Active | Lancashire County Council | |
| Runshaw | Lafarge Tarmac Limited | SD 543 195 | Sand | Active | Lancashire County Council | MPA |
| Sandons Farm | Rigshaw Limited | SD 592 131 | Sand and gravel | Active | Lancashire County Council | |
| Scout Moor | Marshells Natural Stone | SD 814 190 | Sandstone | Active | Lancashire County Council | MPA/BAA |
| Sharples Farm | RMC Aggregates Ltd | SD 472 428 | Sand and gravel | Active | Lancashire County Council | |
| Tong Farm | J Laycock | SD 880 225 | Clay and shale | Active | Lancashire County Council | |
| Waddington Fell | Armstrongs Aggregates Ltd | SD 718 479 | Sandstone | Active | Lancashire County Council | MPA |

| Name | Company | Grid Ref | Mineral | Status | MPA | MPA/BAA |
|---------------------|------------------------|------------|-----------|--------|---------------------------|---------|
| Whinney Hill Quarry | Park Royale Aggregates | SD 756 30 | Sandstone | Active | Lancashire County Council | |
| Whitworth Quarry | Fairhurst Stone | SD 875 202 | Sandstone | Active | Lancashire County Council | MPA |

1 Figures for clay and shale are not reported, site surveyed for potential aggregate sales

Monitoring of planning applications

Table 7.6: Planning Applications for primary aggregate extraction determined 1 January to 31 December 2014

| | Aggregate crushed rock | | | Land-won aggregate sand and gravel | | |
|--------------|------------------------|--------------|---------------------|------------------------------------|--------------|---------------------|
| | Granted (mt) | Refused (mt) | No. of applications | Granted (mt) | Refused (mt) | No. of applications |
| Lancashire | 0.75 | - | 1 | - | - | - |
| Total | 0.75 | - | 1 | - | - | - |

Table 7.7: Planning Applications for primary aggregate extraction pending as at 31 December 2014

| | Aggregate crushed rock | | Land-won aggregate sand and gravel | |
|--------------|------------------------|---------------------|------------------------------------|---------------------|
| | Resource (mt) | No. of applications | Resource (mt) | No. of applications |
| Lancashire | 2.7 | 1 | - | - |
| Total | 2.7 | 1 | - | - |

Table 7.8: Planning application details for primary aggregate extraction determined and pending 1 January to 31 December 2014

| MPA | Site | Applicant | Application No. | Mineral | Area of Application (ha) | Resource (mt) | Extension/new quarry | Decision/data |
|------------|--------------|------------------------|-----------------|-----------|--------------------------|---------------|----------------------|---------------|
| Lancashire | Tong Farm | Jim Laycock | LCC/2014/0055 | Shale | 11.8 | 0.75 | Extension | 16/10/14 |
| Lancashire | Whinney Hill | Park Royal Haulage Ltd | 11/13/0264 | Sandstone | 7.5 | 2.76 | Extension | Pending |

Table 7.9: Environment Act 1995 - summary of aggregate mineral review sites as at 31 December 2014

| MPA | Original | Lapsed | Submitted | Determined | With Sos | High Court |
|-----------------|-----------------|---------------|------------------|-------------------|-----------------|-------------------|
| Phase I | | | | | | |
| Lancashire | 11 | - | - | 11 | - | - |
| Phase II | | | | | | |
| Lancashire | 2 | 1 | - | 1 | - | - |
| Dormant | | | | | | |
| Lancashire | 8 | | - | - | | |

8. Marine Dredged Aggregate

- 8.1. The Crown Estate along with the British Marine Aggregate Producers Association (BMAPA) publish reserve and dredge statistics on an annual basis. The report 'Marine Aggregates the Crown Estate Licences Summary of Statistics 2013' provides summary statistics relating to the dredging and landing of marine dredged aggregate sand. Reserve information is published by The Crown Estate in the Capability and Portfolio report. In addition The Crown Estate and BMAPA publish a summary of the extraction activity in the Area Involved Report, the 17th of which was published in September 2014. Table 8.1 provides detail of the north west dredging areas, Tables 8.2 and 8.3 provide removal and landing statistics for the north west.
- 8.2. During the 2014 monitoring period there were four active dredging licences operating in water off the North West coast.

Table 8.1: North West marine licences and dredging areas 2013

| Area no: | Area name | Licence type | Licence holder | Operational status 2013 |
|----------|---------------|---|---------------------------------------|-------------------------|
| 392 | Hilbre Swash | Active dredge area/application area | Tarmac Marine Dredging Active Limited | Active |
| 393 | Hilbre Swash | Active dredge area/application area | Norwest Sand and Ballast Co | Active |
| 457 | Liverpool Bay | Active dredge area/application area/Option area | Westminster Gravels Ltd | Active |
| 518 | Liverpool Bay | Active dredge area/application area | Hanson Aggregates Marine Ltd | Active |

- 8.3. A total of 520,383 tonnes of material was removed from permitted dredging areas off the North West coast during the 2014 monitoring period, a decrease to a level similar to 2012. This representing a 39.4 per cent reduction in removal levels from 2013. This decrease is due to the reduction in both primary aggregate by 33.6 per cent, and beach nourishment material extraction by 43.9 per cent which served a specific project and does not represent an annual requirement for the material.
- 8.4. Of the total 520,383 tonnes of material removed only 241,578 tonnes was landed at permitted landing points within the North West. Landing within the North West (excluding landings at Penrhyn) has decreased to its lowest recorded level in 10 years, by 34.5 per cent from 315,501 in 2013 to a total of 206,504 during 2014. The largest

decrease was in landings at Barrow wharves where landings decreased by 67.8 per cent from 11,805 in 2013 to 3,790 during 2014. It should also be noted that by quantities Liverpool ports had the biggest reduction with a decrease from 303,696 in 2013 to 202,074 in 2014.

- 8.5. The 'Marine Aggregates Capability and Portfolio document 2014' reports that there are currently 19.10mt of primary marine aggregate reserves in the north west dredging areas, which when compared to the 10 year average annual offtake rate would provide a reserve life of approximately 40.63 years.

Table 8.2: Marine dredged aggregate removed from off the north west coast 2004-2014

| North West | | 2004 ⁷ | 2005 | 2006 | 2007 | 2008 | 2009 | 2010 | 2011 | 2012 | 2013 | 2014 |
|--|-------------------|-------------------|---------|---------|---------|---------|---------|---------|---------|---------|---------|---------|
| Primary | Aggregate | - | 611,983 | 608,134 | 633,405 | 432,889 | 271,598 | 307,509 | 314,098 | 285,368 | 378,813 | 251,424 |
| | River & Misc | - | 124,506 | 111,687 | 109,399 | 87,787 | 92,263 | 39,458 | 0 | 0 | 0 | 0 |
| Secondary | Beach nourishment | - | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 480,000 | 268,959 |
| | Contract fill | - | 0 | 0 | 0 | 207,506 | 276,190 | 9,000 | 0 | 309,300 | 0 | 0 |
| Total aggregates removed | | - | 736,489 | 720,001 | 742,804 | 728,182 | 840,051 | 355,967 | 314,098 | 594,668 | 858,813 | 520,383 |
| Authorised limit of removal (mt/pa) | | - | 1.38 | 1.38 | 1.38 | 1.38 | 1.38 | 1.26 | 1.33 | 1.43 | 0.99 | 1.31 |

Table 8.3: Marine dredged aggregate landed at north west coastal wharfs

| Landing Point | 2004 | 2005 | 2006 | 2007 | 2008 | 2009 | 2010 | 2011 | 2012 | 2013 | 2014 |
|-------------------|---------|---------|---------|---------|---------|---------|---------|---------|---------|---------|---------|
| Barrow | 21,049 | 20,206 | 22,321 | 14,890 | 23,319 | 23,111 | 15,592 | 12,333 | 9,831 | 11,805 | 3,790 |
| Eastham | 99,079 | 124,506 | 111,687 | 109,399 | 87,787 | 92,263 | 40,012 | - | - | - | - |
| Heysham | 95,550 | 95,285 | 138,088 | 119,767 | 11,930 | - | - | - | - | - | - |
| Liverpool | 385,886 | 428,842 | 373,812 | 428,635 | 327,094 | 209,766 | 223,206 | 238,880 | 205,528 | 303,696 | 202,074 |
| Penrhyn | 52,307 | 47,257 | 46,091 | 46,002 | 54,901 | 27,133 | 53,088 | 53,302 | 62,361 | 53,700 | 35,074 |
| Total | 653,871 | 716,096 | 691,999 | 718,693 | 505,031 | 352,273 | 331,898 | 304,515 | 277,720 | 369,201 | 241,578 |
| Total exc Penrhyn | 601,564 | 668,839 | 645,908 | 672,691 | 450,130 | 325,140 | 278,810 | 251,213 | 215,359 | 315,501 | 206,504 |

⁷ Data not available for 2004

9. Secondary and Recycled Aggregates

- 9.1. Recycled Aggregate, which include inert materials such as concrete, stone, brick and other similar materials, are reprocessed materials previously used for construction purposes and which are often taken from the Construction, Demolition and Excavation (CD&E) waste stream. Secondary aggregates are usually by-products of industrial processes and can include materials such as clay, ash and slag.
- 9.2. The use of secondary and recycled materials not only reduces the requirement for new production of primary aggregate, but also reduces the need for disposal to landfill of CD&E waste materials. The National Planning Policy Framework (para 163) recognises this and strongly promotes the use of secondary and recycled materials as an alternative to primary aggregate.
- 9.3. Data on secondary and recycled aggregate production and use is variable and incomplete. This is because, while some sites operate under license and can be monitored, much recycling and re-use occurs on individual construction sites, is temporary in nature and does not produce data. Insufficient data was obtained for 2014 and it is hoped that this can be reported on in a future report.

Appendix 1: AWP Membership

| Aggregate Working Party Representatives | |
|---|--|
| Chairman | <p>Carolyn Williams Group Leader Minerals and Waste Urban Vision Partnership Ltd 5th Floor, Emerson House, Albert Street, Eccles, Manchester M30 0TE Tel: 0161 604 7746 carolyn.williams@urbanvision.org.uk</p> |
| Secretary (during 2014) | <p>Natalie Durney-Knight Spatial Planning, Cheshire West and Council Now replaced by Jonathan Evans of Urban Vision, contact details are provided at the start of the report.</p> |
| Government Representatives | |
| Department for Communities and Local Government | <p>Eamon Mythen Planning for Minerals and Sustainable Waste Management Team DCLG Planning Directorate Infrastructure and Environment Division, Third Floor Fry Building, 2 Marsham Street, London SW1P 4DF Tel: 0303 44 41654 Eamon.Mythen@communities.gsi.gov.uk</p> |
| Local Government Representatives | |
| Cheshire East Council | <p>Emma Williams Strategic Planning & Housing, Cheshire East Council, Westfields, Middlewich Road, Sandbach, Cheshire CW11 1HZ</p> |
| Cheshire West and Chester | <p>Rosie Morgan Spatial Planning, Cheshire West and Chester Council, The Forum Offices, Chester CH1 2HS</p> |

| | |
|--|--|
| Cumbria | Sue Brett Minerals & Waste Planning Policy Team, Cumbria County Council, County Offices, Buser Walk, Kendal, Cumbria LA9 4RQ |
| Environmental Advisory Service (Merseyside) | Paul Slinn Environment Advisory Service, Byrant House, Liverpool Road North, Maghull L31 2PA |
| Urban Vision Partnership Ltd (Greater Manchester) | Louise Hilder Urban Vision Partnership Ltd, 5 th Floor, Emerson House, Albert Street, Eccles, Manchester M30 0TE |
| Lancaster County Council | Richard Sharples Environment Directorate, Lancashire County Council, Guild House, Cross Street Preston, PR1 8RD |
| Lake District National Park | Paula Allen Lake District National Park Authority, Murley Moss, Oxenholme Road, Kendal LA9 7RL |
| Warrington Borough Council | Kevin Usher Environment and Regeneration Department, Warrington Borough Council, New Town House, Buttermarket Street, Warrington WA1 2NH |
| Industry Representatives | |
| Aggregate Industries UK Limited | Geoff Storey Aggregate Industries UK, High Roads, Nether Kellet, Cranforth, Lancashire LA6 1EA |
| British Aggregate Association | Peter Huxtable Marshalls Natural Stone Division, Brier Lodge, Southwam, Harlifax HA3 9SY |
| British Marine Aggregate Producers Association | Andrew Bellamy BMAPA, UMA House, Shopwhyke Road, Chichester PO20 2AD |
| Cemex UK | Mark Kelly Cemex UK Operations Limited, Coldharbour Lane, Thorpe, Egham, Surrey TW20 8TD |

| | |
|---------------------------------------|--|
| Hanson Heidelberg Cement Group | Andrew Bower Hanson Aggregates, Clifford House, Wetherby Business Park, York Road, Wetherby, West Yorkshire LS22 7NS |
| Minerals Products Association | Malcolm Ratcliffe Minerals Products Association, Gillingham House, Gillingham Street, London SW1V 1HU |
| Sibelco UK Ltd | Nick Horsley Sibelco UK Ltd, Brookside Hall, Congleton Road, Sandbach, Cheshire CW11 4TF |
| Tarmac Limited | Grahame Fyles Tarmac Limited, Tunstead House, Buxton, Derbyshire SK17 8TG |

Appendix 2: AWP Activities

**Minutes of annual meeting Wednesday 10 December 2014
12.30pm Cheshire West and Chester
HQ, Nicholas Street, Chester**

Attendees:

Natalie Durney-Knight Secretary – North West Aggregate Working Party

| | | | |
|-----------------|-------------------------|-------------------|----------------------|
| Andrew Bower | Hanson Aggregates | Malcolm Ratcliffe | MPA |
| Nick Everington | Crown Estate | David Robinson | Bathgate Silica Sand |
| Louise Hilder | Urban Vision | Richard Sharples | Lancashire CC |
| Peter Huxtable | BAA | Paul Slinn | MEAS |
| Maggie Mason | Cumbria CC | Geoff Storey | Aggregate Industries |
| Rosie Morgan | Cheshire West & Chester | Carolyn Williams | MWPU |
| Eamon Mythen | CLG | Emma Williams | Cheshire East |

Apologies:

| | | | |
|--------------|------------|-------------|--------------------|
| Sue Brett | Cumbria CC | Mary Sweet | Environment Agency |
| Nick Horsley | Sibelco | Kevin Usher | Warrington BC |
| Ian Pearson | BAA | | |

| Item | Description |
|------|---|
| 1 | Introduction and apologies |
| 2 | Minutes and actions from last meeting |
| 3 | AM2014 progress |
| 4 | Timetable for AM2015 |
| 5 | Local Aggregate Assessment review and scrutiny arrangements |
| 6 | Crown Estate update |
| 7 | Communities and Local Government update |
| 8 | Industry update |
| 9 | MPAs update |
| 10 | AOB |
| 11 | DONM |

1. Introduction and apologies

Louise Hilder (LH) welcomed everyone to the meeting and gave apologies for Sue Brett (Cumbria County Council), Nick Horsley (Sibleco), Ian Pearson (BAA), Mary Sweet (Environment Agency) and Kevin Usher (Warrington Borough Council).

LH explained that she is no longer employed at Cheshire West and Chester and now works for Urban Vision. Due to this change a call for a new chair would be dealt with at the end of the meeting.

2. Minutes and actions from last meeting

LH asked for any outstanding matters from the last meeting – none were raised.

Minutes of the last meeting were agreed as a true and accurate record of the meeting and discussions.

ACTION: None

3. AM2014 Progress

Natalie Durney-Knight (NDK) stated that draft sub-region chapters had been circulated to the relevant MPAs and comments had now been received. A full draft of the report would be circulated in week commencing 15 December to all AWP members for comment.

NDK reported the following draft findings to the group:

Crushed rock

Crushed rock reserves have fallen by approximately 6 per cent to 275.83mt from 293.1mt in 2012. This fall is largely due to previous double counting at a number of sites. Sales of crushed rock have fallen by 14 per cent to 4.97mt – this is the lowest recorded figure for over 10 years and is less than half the amounts recorded for the period 1998 – 2002. The landbank for crushed rock is 28.6 years based on an annual apportionment figure of 9.62mt.

Sand and gravel

Sand and gravel reserves have fallen by approximately 6 per cent to 36.23mt from 38.61mt in 2012. This fall is in line with sales figures. Sales of sand and gravel have fallen by only half a per cent to 2.22mt and figures remain roughly in line with those recorded for the period 2009 – 2012. The landbank for sand and gravel is 11.84 years based on an annual apportionment figure of 3.26mt.

NDK requested that comments be sent back in the week commencing 5th January 2015. Malcolm Ratcliffe (MR) stated that some may struggle to meet this deadline.

ACTION: NDK to circulate full draft report to all AWP members in w/c 15 December. Comments to be sent to NDK by **16 January 2015** at the latest.

4. Timetable for AM2015

Eamon Mythen (EM) advised the group that the four yearly Annual Minerals survey contract had been delayed but would be commencing in 2015 using 2014 data. The following survey would be carried out in 2017 to bring the AM survey back in to a four yearly cycle. Due to

this delay MPAs should **not** issue aggregate monitoring surveys until they have received the forms from the awarded body. MR stated that the MPA would be encouraging all of its members to return forms in a timely manner.

ACTION: NDK to advise when more information is available relating to the commencement of the AM 2015 survey.

5. **Local Aggregate Assessment review and scrutiny arrangements**

NDK advised that all but one LAA had now been received and that delays had been caused by numerous issues including delays in industry representatives providing data. NDK advised that a summary report had been prepared and circulated with all of the LAAs received. It was noted that due to attachment sizes not all of the group had received this and NDK advised that it would be resent.

MR expressed concern that some LAAs were being published without any consultation with industry. Peter Huxtable (PH) agreed that this was a concern and asked that MPAs send consultations direct to himself and MR for them to distribute to relevant members.

MR informed the group that a timetable for the production and review of LAAs had been produced by POS which had been discussed at the NE AWP meeting and considered to be reasonable. MR suggested that the NW AWP look to use this timetable for future LAA reviews. The group agreed that this should be considered.

NDK queried whether a further meeting of the AWP is required to discuss the outcomes of the LAA consultation. The decision will be made when the consultation has been carried out.

ACTION: NDK to circulate LAA summary and consultation documents to the group. Comments to be sent to NDK by **Friday 16 January 2015**.

6. **Crown Estate update**

Nick Everington (NE) informed the group that licences have now been reviewed to bring them in line with the Habitats Directive and all now have an EIA in place. 2013 landing statistics are now available on the Crown Estate's website. The market for marine aggregate increased by 1 million during 2013 nearly all of which was within the UK as the EU market is still reducing. The 16th Annual Area Involved report was published in October and the second capability report provides extraction and reserve figures for 2013. Marine extraction policy in Wales is currently being reviewed by Natural Resources Wales. There are currently three operational licenses with a fourth area under a five year exploration and option agreement, which was granted to Hanson in 2013. The applicant has a five year period to progress an application for a marine licence. The Crown Estate is currently investigating innovation in coastal management systems. This will include the potential for development of the 'landscaping' concept, which provides benefits in terms of overall costs and through coastal community regeneration. Hub wharf concept is being reviewed by Arup and RHDHV – looking at more economical and sustainable ways of working especially in light of new vessels being much larger than the current ageing fleet. Thames is good example of new ways of working – material is landed by conveyor, no hard quay is required. Safeguarding of wharfs is becoming of increasing concern as development is encroaching and causing amenity issues. Greenwich peninsula is an example where residential development is encroaching on the wharf.

ACTIONS: NE to send link to Area involved report and landing statistics to NDK.

7. CLG update

EM informed the group that CLG has now moved to the Fry Building. Work on a new tender for Minerals Information Programme will commence in the new year. The Annual Minerals Raised Inquiry for 2013 is expected to be published early in the new year. It is CLGs intention to hold an NCG meeting in the near future, the agenda of which will be consulted upon, but the operation of the MASS system is likely to feature.

ACTION: None

8. Industry update

Geoff Storey (GS) stated that increasingly stretched resources at Mineral Planning Authorities has started to impact upon how quickly applications are being decided. One extreme example is where an application was submitted but couldn't be validated due to the lack of resources. Planning Performance Agreements are not seen as the answer for minerals industry and they can be seen as buying planning permission.

David Robinson (DR) informed the group that another silica sand site was shortly due to close in Cheshire East which will inevitably put additional strain on sites in the surrounding area to pick up the slack in supply of aggregate that this site provided.

MR informed the group that POS guidance on LAAs is now at version six and that much of MPAs comments have been that there is no need to repeat what is in national guidance. MPA have made two recommendations: provide a summary sheet for each LAA setting out one landbank figure and show track changes where numerous versions are consulted upon or where the same template is utilised year on year. Some LAAs are still far too long and there is still some disagreement as to what forecasting actually means. There also needs to be more transparency as to the evidence base supporting the LAAs. The MPAs Annual Minerals Planning Survey has been published and is available on the website.

PH informed the group that there is still uncertainty surrounding the future of the Aggregates Levy and there is the view that it should be abandoned in favour of a community levy.

9. MPAs update

Paul Slinn (PS) informed the group that Knowsley's Local Plan examination is now complete and Wirral is nearing submission. The formal combined authority was formed in April although it does not currently have any land use responsibilities.

Carolyn Williams (CW) informed the group that the Greater Manchester combined authority will have an elected mayor and has expressed a wish to draw up a sub-regional plan.

Richard Sharples (RS) informed the group that Lancashire is commencing a review of its adopted Core Strategy.

Maggie Mason (MM) informed the group that Cumbria will be consulting on its Regulation 18 stage in February.

NDK informed the group that the Cheshire West and Chester examination was held in June-July and the Inspector's Main Modifications were consulted upon in September – October. The Council is now awaiting the Inspector's final report and is looking to adopt the plan in the new year.

Emma Williams (EW) informed the group that she is now the only minerals planner in Cheshire East responsible for both development management and policy work. Cheshire East Local Plan examination has been adjourned with the Council and Inspector yet to finalise the work programme going forward. A call for sites has been carried out and work is now underway on assessing sites that were submitted.

10. AOB

LH invited the group to make any further nominations for Chair stating that one nomination (Carolyn Williams) had been received. The group elected Carolyn Williams.

11. DONM

Date of the next meeting to be decided on outcome of LAA consultation.

Appendix 3: Glossary

Apportionment - currently set by the 'National and regional requirements for aggregate provision in England 2005-2020', a specified amount of aggregates to be produced annually on a sub-regional basis.

Core Strategy/Local Plan - a plan setting out the spatial vision for the Local Planning Authority area, the spatial objectives and strategic policies to deliver that vision.

Duty to co-operate - introduced by the Town & Country Planning (Local Planning) (England) Regulations 2012, requires Local Authorities and other public bodies to co-operate on planning issues.

High Specification Aggregate - natural and artificial coarse aggregates which meet the physical test criteria for Polished Stone Value and Aggregate Abrasion Value.

Licence Application Area - areas which are in the process of being developed for new licence dredge areas. These areas are subject to a full environmental impact assessment and public consultation before permission is granted by the Marine Management Organisation.

Licence Option Area - awarded by the Crown Estate following a successful tender by a company seeking to develop a new dredging area. The company is permitted to explore the area for viable resources during during a period of 5 years, during which the licence application process must be completed.

Licensed Dredge Area - active licenced dredge areas.

Local Development Framework - a set of Local Development Documents which include the Local Development Scheme, Statement of Community Involvement and Local Plan.

Appendix 4: Acronyms

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| AM | Annual Monitoring |
| AMR | Annual Monitoring Report |
| AWP | Aggregate Working Party |
| BAA | British Aggregates Association |
| BGS | British Geological Survey |
| BMAPA | British Marine Aggregate Producers Association |
| CDEW | Construction, Demolition and Excavation Waste |
| CLG | Communities and Local Government |
| HSA | High Specification Aggregate |
| LDF | Local Development Framework |
| MDF | Minerals Development Framework |
| MLP | Minerals Local Plan |
| MPA | Mineral Products Association |
| MPAs | Mineral Planning Authorities |
| MPG | Minerals Planning Guidance |
| MPS | Minerals Planning Statement |
| Mt. | Million Tonnes |
| NCG | National Co-Ordinating Group |
| NFDC | National Federation of Demolition Contractors |
| NPPF | National Planning Policy Framework |
| RPB | Regional Planning Body |
| RPG | Regional Planning Guidance |
| RSS | Regional Spatial Strategy |
| RTAB | Regional Technical Advisory Body |
| UDP | Unitary Development Plan |