Capita

North West Aggregate Working Party

Annual Monitoring Report 2019, incorporating data from January to December 2018

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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. A map showing the Minerals Planning Authorities within the North West AWP is given in Figure 1.

This Annual Monitoring (AM) report provides sales and reserve data for the calendar year 1st January – 31st December 2018. 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 andHalton 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. A summary of key figures for 2018 are provided below.

Crushed Rock

- Total Crushed Rock Sales of 4.96mt (6.43mt in 2017)
- Total Crushed Rock Reserves of 271.25 mt (282.24mt in 2017).
- Landbank of years 28.19mt (29.3years in 2017).

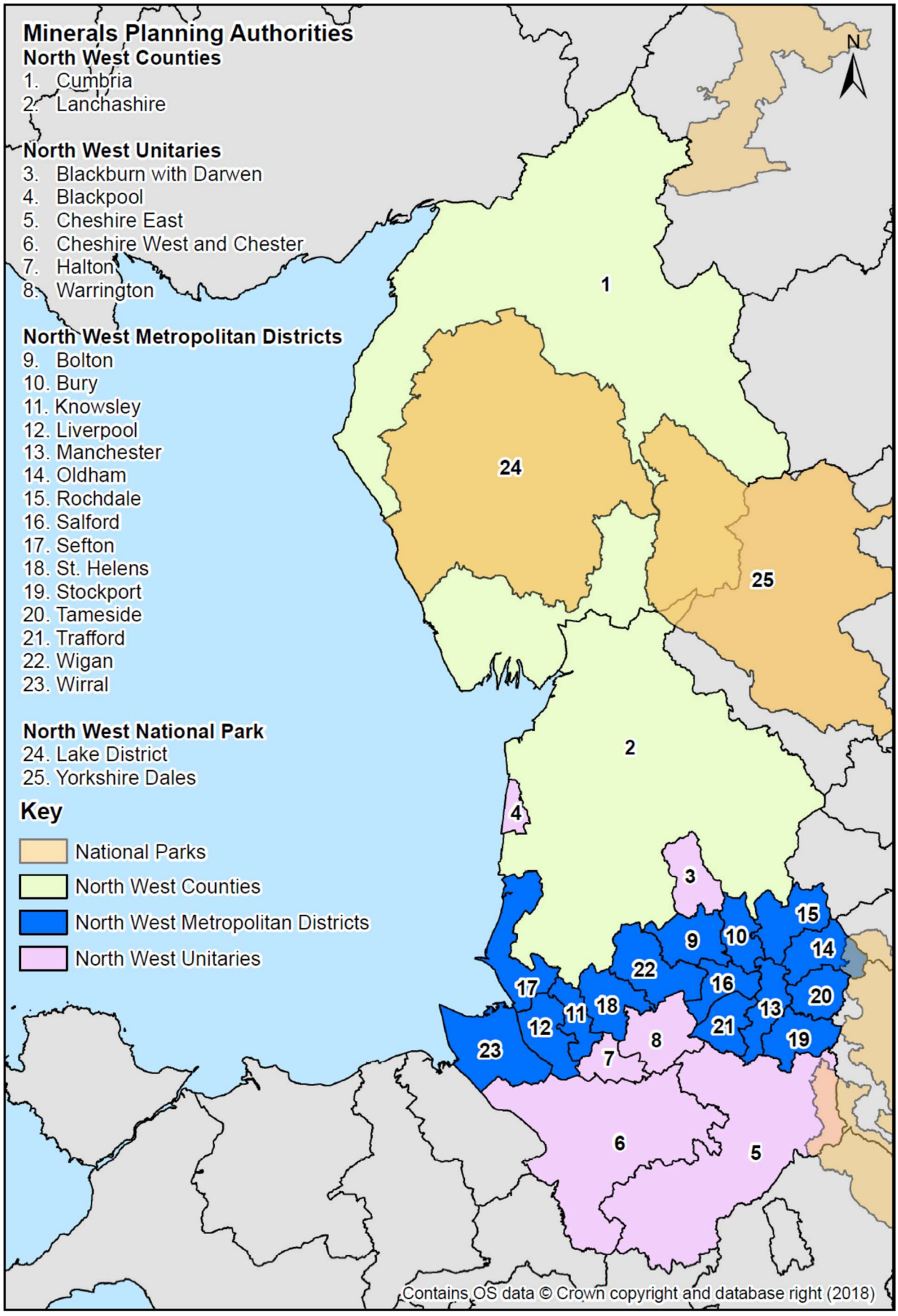
Land-won Sand and Gravel

- Total Land-won Sand and Gravel Sales of 2.82mt (2.40mt in 2017).
- Total Land-won Sand and Gravel Reserves of 22.677mt (21.78mt in 2016).
- Landbank of 6.95 years (7.22 years in 2017).

Landings of Marine-dredged Sand and Gravel

- Total Marine-dredged Sand and Gravel removed was 1.2 mt (0.32mt in 2017).
- Landing of Marine-dredged Sand and Gravel 0.26mt (0.31mt in 2017).

Figure 1 North West Aggregate Working Party Mineral Planning Authorities 2018



Contents

EXECUTIVE SUMMARY I

1. INTRODUCTION 1

Background 1
Planning Policy 2
Report Scope 3

2. DEVELOPMENT PLANS 5

Cheshire East 5
Cheshire West and Chester 5
Cumbria 5
Lake District National Park 5
Greater Manchester 5
Merseyside 6
Warrington 7
Lancashire……

3. NORTH WEST 7

Total aggregate sales, reserves and landbank 8
Aggregate crushed rock sales, reserves and landbank 8
Aggregate sand and gravel sales, reserves and landbank 8

4. CHESHIRE EAST AND CHESHIRE WEST AND CHESTER 11

Aggregate crushed rock sales, reserves and landbank 11
Aggregate sand and gravel sales, reserves and landbank in Cheshire East 12
Aggregate sand and gravel sales, reserves and landbank Cheshire West and Chester 12
Monitoring of planning applications 17

5. CUMBRIA 20

Aggregate crushed rock sales, reserves and landbank 20
Aggregate sand and gravel sales, reserves and landbank 20
Monitoring of planning applications 26

6. GREATER MANCHESTER, MERSEYSIDE AND WARRINGTON 27

Aggregate crushed rock sales, reserves and landbank 27
Aggregate sand and gravel sales, reserves and landbank 28
. 30
Monitoring of planning applications 32

7. LANCASHIRE 34

Aggregate crushed rock sales, reserves and landbank 34
Aggregate sand and gravel sales, reserves and landbank 35
Monitoring of planning applications 38

8. MARINE DREDGED AGGREGATE 40

9. SECONDARY AND RECYCLED AGGREGATES 43

APPENDIX 1: AWP MEMBERSHIP 45

APPENDIX 2: AWP ACTIVITIES 49

APPENDIX 3: ACRONYMS 59

Tables

Table 1-1: National and Regional Guidelines for Aggregates Provision in England, 2005 –2020 (Mt) 3
Table 3-1 North West aggregate landbank as at 31 December 2018, based on Annual Apportionment 2005 - 2020 8
Table 3-2: North West land-won aggregate sales 2009-2018 (million tonnes) 10
Table 3-3: North West land-won aggregate reserves 2009-2018 (million tonnes) 10
Table 4-1: Cheshire East aggregate crushed rock Landbank as at 31 December 2018 11
Table 4-2: Cheshire aggregates land-won sand and gravel landbanks as at 31 December 2018 12
Table 4-3 Cheshire aggregate crushed rock sales and reserves 2009 to 2018 (million tonnes) 14
Table 4-4: Cheshire aggregate sand and gravel sales and reserves 2009 to 2018 15
Table 4-5: Cheshire aggregate sites surveyed 2018 16
Table 4-6: Planning applications for primary aggregate extraction determined between 1 January and 31 December 2018 17
Table 4-7: Planning applications for primary aggregate extraction pending as at 31 December 2018 17
Table 4-8: Planning application details for primary aggregate extraction determined and pending 1 January to 31 December 2018 17
Table 4-9: Environment Act 1995 - summary of aggregate mineral review sites as at 31 December 2018 19
Table 5-1: Cumbria aggregate crushed rock Landbank as at 31st December 2018 20
Table 5-2: Cumbria aggregate land-won sand and gravel Landbank as at 31st December 2018 20
Table 5-3: Cumbria aggregate crushed rock sales and reserves 2009-2018 22
Table 5-4: Cumbria aggregate sand and gravel sales and reserves 2009-2018 22
Table 5-5: Cumbria aggregate sites surveyed 2018 23
Table 5-6: Planning Applications for primary aggregate extraction determined 1 January to 31 December 2018 26
Table 5-7: Planning Applications for primary aggregate extraction pending as at 31 December 2018 26
Table 5-8: Planning application details for primary aggregate extraction determined and pending 1 January to 31 December 2018 26
Table 5-9: Environment Act 1995 - summary of aggregate mineral review sites as at 31 December 2018 27
Table 6-1: Greater Manchester, Merseyside and Halton and Warrington aggregate crushed rock landbank as at 31st December 2018 – does not include imported material 28
Table 6-2: Greater Manchester, Merseyside and Halton and Warrington aggregate land-won sand and gravel landbank as at 31st December 2018 29
Table 6-3: Greater Manchester, Merseyside and Halton and Warrington aggregate crushed rock sales and reserves 2009-2018 30
Table 6-4: Greater Manchester, Merseyside and Halton and Warrington aggregate sand and gravel sales and reserves 2009-2018 30
Table 6-5: Greater Manchester, Merseyside and Halton and Warrington aggregate sites and wharves surveyed 2018 31
Table 6-6: Planning Applications for primary aggregate extraction determined 1 January to 31 December 2018 32
Table 6-7: Planning Applications for primary aggregate extraction pending as at 31 December 2018 32
Table 6-8: Planning application details for primary aggregate extraction determined and pending 1 January to 31 December 2018 33

Table 6-9: Environment Act 1995 - summary of aggregate mineral review sites as at 31 December 2018 33
Table 7-1 Lancashire aggregate crushed rock landbank as at 31st December 2018 34
Table 7-2 Lancashire aggregate land-won sand and gravel landbank as at 31st December 2018 35
Table 7-4: Lancashire aggregate crushed rock sales and reserves 2009-2018 36
Table 7-5: Lancashire aggregate sand and gravel sales and reserves 2009-2018 36
Table 7-6: Lancashire aggregate sites surveyed 2018..... 37
Table 7-7: Planning Applications for primary aggregate extraction determined 1 January to 31 December 2018 38
Table 7-8: Planning Applications for primary aggregate extraction pending as at 31 December 2018 38
Table 7-9: Planning application details for primary aggregate extraction determined and pending 1 January to 31 December 2018..... 39
Table 7-10: Environment Act 1995 - summary of aggregate mineral review sites as at 31 December 2018 ... 39
Table 8-1: North West marine licences and dredging areas 2018..... 40
Table 8-2: Marine dredged aggregate removed from off the North West coast 2009-2018 42
Table 8-3: Marine dredged aggregate landed at North West coastal wharfs 2009 - 2018 42
Table 9-1 Secondary/Recycled aggregate sales and number of active sites in the North West, 2018 ..... **Error! Bookmark not defined.**

Figures

Figure 1 North West Aggregate Working Party Mineral Planning Authorities 2018 III

1. Introduction

1.1. This Annual Monitoring Report (AM2019) 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 in the National Planning Practice Guidance.

Background

1.2. The AWPs[1] were established in the 1970s to collect and monitor data on aggregates provision as an aid to minerals planning. AWPs 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). The NCG had not met for a number of years until a meeting took place in October 2017.

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 AWPs operate under contracts between the Secretary of State for Communities and Local Government and the Chairs of the AWPs, 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 Halton and Warrington
- Lancashire

1.6. In 2018 the Chairperson of the NWAWP was Carolyn Williams, Group Leader Minerals and Waste Planning Unit representing the Greater Manchester Combined Authority (GMCA). The AWP was also serviced by a Technical Secretary, which was Mike Halsall (for the meeting held on 9th July 2018) and Duncan McCorquodale (for the meeting held on 22nd November 2018). The membership of the North West AWP for 2018 is set out in Appendix 1.

1.7. There were two AWP meetings during the period January – December 2018. The minutes of these meetings are supplied as appendices to this Report.

1.8. The Chairperson and Secretary for the NWAWP changed during 2019 which is when this report was prepared and approved. During 2019, there was no permanent Chair, and therefore the Secretary has been Chair for both meetings held in 2019 on an interim basis. For the NWAWP Meeting held in June 2019, Maria Cotton was the Chair and Vanessa Rowell was the Secretary, and for the meeting held in October 2019, Vanessa Rowell was both the Chair and the Secretary.

Planning Policy

The National Planning Policy Framework

1.9. The NPPF requires MPAs (amongst other matters) 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.

1.10. 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)

1.11. AWPs are to produce an annual report on minerals activity in their area, provide technical advice to MPAs on the adequacy of an 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

1.12. 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

1.13. Data on primary aggregates sales from land-won sand and gravel sites, wharves and rail depots for 2018 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 2018 with data for earlier years.

1.14. The planning context for this report is the National Planning Policy Framework[2] (NPPF) and Guidance on the Managed Aggregate Supply System[3] at the national level, and adopted Local Plans as the overall strategic plan for the area.

[2] National Planning Policy Framework, DCLG February 2019
[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 Local Plan Strategy (Part One Plan) was adopted on 27 July 2017. The Site Allocations and Development Policies Document (Part Two) Regulation 19 consultation took place between 19 August to 30 September 2019. The Minerals and Waste Development Plan Document (Part Three) Proposed Draft Plan consultation is programmed for Autumn 2019.

Cheshire West and Chester

2.3. The Local Plan (Part One) was adopted on 29th January 2015. This includes policy ENV 9 on Minerals supply and safeguarding. The Local Plan (Part Two) Land Allocations and Detailed Policies, which includes a set of policies relating to minerals, was adopted on 18th July 2019.

Cumbria

2.4. The Minerals and Waste Local Plan was adopted in September 2017.

Lake District National Park

2.5. The Lake District Local Plan Review Options, Preferred Options, and Suggested Approaches consultation took place between May and June 2018. The Local Plan was submitted to the Planning Inspectorate on 1st August 2019 for examination.

Greater Manchester

2.6. The Greater Manchester Joint Minerals Plan was adopted by the 10 Authorities of Greater Manchester on 26th April 2013. The current Minerals Plan seeks to deliver the apportionment only and does not look at the import of minerals to meet the growth agenda. An internal review of the Minerals Plan has been undertaken following the plan reaching 5yrs. This has identified a number of policy areas which will need to be updated

to ensure the plan is in line with NPPF. Currently there are no plans to update this document until the Greater Manchester Spatial Framework (GMSF) is adopted.

2.7. The draft GMSF underwent Consultation between January and March 2019 and the GMSF includes a section on minerals. Full details on the timetable for the GMSF can be found on the Greater Manchester Combined Authority website https://greatermanchester-ca.gov.uk/.

Merseyside and Halton

2.8. The Liverpool City Region now has a Combined Authority and an elected Mayor. The Mayor will put in place a statutory Strategic Framework for the City Region which Local Plans will be expected to be in conformity with.

2.9. Halton's Core Strategy Local Plan was adopted in April 2013. The Council consulted on the first draft of its new Local Plan, the Delivery and Allocations Local Plan (incorporating revised Core Strategy Policies) between the 4th January and the 15th February 2018. The proposed submission consultation on the Local Plan took place between 25th July and 19th September 2019.

2.10. Knowsley's Core Strategy Local Plan was adopted in January 2016.

2.11. Liverpool has no current core strategy and consulted on the Pre-submission Draft of the Liverpool Local Plan between January and March 2018. The Local Plan was submitted to the Planning Inspectorate on 22nd May 2018.This will contain policy on mineral safeguarding and extraction but no separate Minerals Local Plan.

2.12. Sefton's Local Plan was adopted in April 2017. It includes detailed minerals policies.

2.13. St Helen's Core Strategy Local Plan was adopted in October 2012. The Local Plan is currently being prepared, and a consultation on the Proposed Submission took place between 17th January 2019 and 13th May 2019. It is anticipated that the plan will be submitted to the government in Autumn 2019. There is no separate Minerals Local Plan.

2.14. The Wirral's Core Strategy Local Plan is progressing. The Council submitted a Local Plan Action Plan to the Secretary of State on 28th January 2019. The regulation 18 consultation is expected to take place at the beginning of 2020. This includes overarching minerals policy. There will be no separate Minerals Local Plan.

Warrington

2.15. The Council undertook a Regulation 18 consultation on their Preferred Development Option during July to Sept 2017. This outlines that the new Local Plan will identify Mineral Safeguarding Areas (MSAs) for the main mineral resources that are present in the borough, principally sand and gravel and sandstone. It will also seek to safeguard a shallow coal deposit and the clay workings near Rixton. In addition, to safeguarding mineral resources which may be of economic importance, it is proposed to safeguard existing, planned and potential minerals infrastructure such as rail heads, wharfs, concrete batching sites, and permanent facilities for the processing and distribution of substitute, recycled and secondary aggregate material.

2.16. The new Local Plan will also aim to direct minerals development to places where there are opportunities to restore land beneficially, avoiding places with a sensitive natural or built environment or that are close to existing communities. These will be places that are accessible by sustainable modes of transport and close to both the existing highway network and the end user. The Proposed Submission consultation took place between 15th April and 17th June 2019.

Lancashire

2.17. Consultation on the draft revised Minerals and Waste Local Plan took place between September and November 2018. It is anticipated that the Proposed submission consultation will take place Autumn/Winter 2019 before with examination taking place Summer 2020.

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 2018.

Total aggregate sales, reserves and landbank

3.2. During the 2018 monitoring period total aggregate sales rose from 8.84mt in 2017 to 7.78mt in 2018. This brings sales to 5.1 mt below the annual apportionment [4] for aggregate provision of 12.88mt. Total aggregate reserves decreased from 305.78mt as at 31 December 2017 to 289.12mt in 2018.

3.3. The total aggregate landbank for the North West as at 31 December 2018 has fallen from 23.74 years in 2017 to 22.44 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 2018, based on Annual Apportionment 2005 - 2020

Aggregate	Annual apportionment requirement 2005-2020	Reserves as at 31.12.2017	Landbank as at 31.12.2017	Reserves as at 31.12.2018	Landbank as at 31.12.2018
Crushed Rock	9.62mt	282.24mt	29.3 years	271.25mt	28.19 years
Land-won sand and gravel	3.26mt	23.54mt	7.22 years	22.67mt	6.95 years
Total	**12.88mt**	**305.78mt**	**23.74 years**	**293.92**	**22.81 years**

Aggregate crushed rock sales, reserves and landbank

3.4. Sales of crushed rock aggregate fell from 6.44mt in 2017 to 4.96mt in 2018. Demand for the material is currently met through imports from other mineral planning authorities, into areas such as Cheshire West and Chester in particular, as that authority has no crushed rock reserves of its own.

3.5. Total reserves of crushed rock aggregate dropped from 282.24mt in 2017 to 271.25 mt.

3.6. The crushed rock landbank for the North West as at 31 December 2018 was 28.19 years, in excess of the “at least” 10 year requirement of the NPPF. Landbanks for the sub-regions are detailed in the individual chapters.

Aggregate sand and gravel sales, reserves and landbank

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

3.7. Sales of land-won aggregate sand and gravel increased from 2.40mt in 2017 to 2.82mt in 2018. Demand has therefore increased. Demand for the material is currently met through imports from other mineral planning authorities into areas such as the sub-region of Greater Manchester, Warrington and Merseyside and Halton in particular, with consumption rates far exceeding local supply.

3.8. Reserves of land-won aggregate sand and gravel were 22.67mt as at 31 December 2018, a decrease from the reserves at the end of 2017 at 23.54mt. The sand and gravel landbank for the North West as at 31 December 2018 was 6.95 years and is therefore below the “at least” 7 year landbank requirement under the NPPF. The North West region is therefore below the landbank requirement which is a serious cause for concern, particularly for the major metropolitan areas where supply is assumed. Landbanks for the sub-regions are detailed in the individual chapters.

Table 3-2: North West land-won aggregate sales 2009-2018 (million tonnes)

Monitoring Period	2009	2010	2011	2012	2013	2014	2015	2016	2017	2018
Limestone	3.77	4.05	3.39	3.53	3.10	3.71	4.92	4.29	3.88	2.49
Sandstone and igneous rock	1.34	1.63	1.29	1.72	1.46	2.08	2.11	2.60	2.13	1.95[5]
High Specification Aggregate (HSA)	0.78	0.59	0.60	0.55	0.41	0.38	0.42	0.48	0.43	0.52
Total Crushed Rock Sales	5.89	6.27	5.28	5.80	4.97	6.18	7.45	7.37	6.44	4.96
Land-won sand and gravel	2.18	2.29	1.87	2.01	1.91	2.71	3.39	2.48	2.40	2.82
Total sand and gravel sales*	2.18	2.29	1.87	2.01	1.91	2.71	3.39	2.48	2.40	2.82
Total Aggregate Sales	**8.07**	**8.56**	**7.15**	**7.81**	**6.88**	**8.89**	**10.84**	**9.85**	**8.84**	**7.78**

*Does not include marine dredged material

Table 3-3: North West land-won aggregate reserves 2009-2018 (million tonnes)

Monitoring Period	2009	2010	2011	2012	2013	2014	2015	2016	2017	2018
Limestone	171.53	175.40	166.30	160.20	158.33	145.54	158.51	142.29	137.35	134.62
Sandstone and igneous rock	138.60	153.30	115.36	119.20	105.90	126.73	132.73	131.39	128.33	120.61
High Specification Aggregate (HSA)	17.26	13.16	13.80	13.70	11.53	10.98	17.22	16.74	16.56	16.11
Total Crushed Rock Reserves	327.39	341.86	295.46	293.10	275.76	283.21	308.58	290.42	282.24	271.25
Land-won sand and gravel	41.77	36.17	35.33	38.61	36.39	26.65	27.67	21.78	23.54	22.67
Total sand and gravel reserves	41.77	36.17	35.33	38.61	36.39	26.65	27.67	21.78	23.54	22.67
Total Aggregate Reserves	**369.16**	**378.03**	**330.79**	**331.71**	**312.15**	**309.86**	**330.97**	**312.2**	**305.78**	**293.92**

4. Cheshire East and Cheshire West and Chester

4.1. Since 2010, 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 to Cheshire East for this aggregate.

Aggregate crushed rock sales, reserves and landbank

4.2. The aggregate figures include estimates where returns were not received. Sales of aggregate land-won crushed rock from Cheshire East have remained at 0.001mt in 2018, compared to 2017. 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 and aggregate production is a by-product of the main uses. Reserves of aggregate crushed rock have decreased slightly from 4.9mt at 31 December 2017 to 4.8mt at 31 December 2018. The large landbank shown in Table 4-1 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 2018

	2018 Aggregate Sales (million tonnes)	Permitted Reserves at 31/12/18 (million tonnes)	Average Annual Sales, previous 3-years (2016 – 2018) (million tonnes)	Average Annual Sales 2009 – 2018 (million tonnes)	Landbank as at 31/12/2017 (years) (based on 10 years average sales)	LAA Provision figure (million tonnes) (latest available)	Landbank as at 31/12/2018 based on LAA provision figure (years)
Crushed Sandstone	0.001	4.89	0.001	0.001	>50years[7]	0.001	>50 years[6]

[6] It should be noted that all the quarries producing crushed rock aggregate have an end date of 2042 or earlier. In addition, most sites only produce a small proportion of aggregate alongside other/non-aggregate products such as masonry or dressed stone therefore for some quarries, permitted reserves do not consist exclusively of aggregate.

Aggregate sand and gravel sales, reserves and landbank in Cheshire East

4.3. Sales of land-won aggregate sand and gravel in Cheshire East increased to 0.55mt in 2018 from 0.29mt in 2017. Estimated reserves of sand and gravel were at 2.52mt, down from 3.70mt as at 31st December 2017.

4.4. 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. The landbank figure may not therefore be an accurate reflection of reserves of sand and gravel for aggregate use.

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

4.5 Sales of land-won aggregate sand and gravel in Cheshire West and Chester have increased to 0.80mt from 0.67 in 2017. There was a reassessment of reserves in the 2017 period that was not picked up in the monitoring return until the 2018 period. As such, the reserves as at December 2017 were 6.54mt (not 6.04mt as reported in the 2017 AMR). The reserves in 2018 are therefore 0.75mt lower than in 2017.

4.6 Data solely from Chester West and Chester is only available from 2010. It is therefore not possible to calculate the landbank based on 10-years of past sales data. However, in their Local Aggregate Assessment, Cheshire West and Chester make an assumption about figures prior to 2010 and this is shown in Table 4-2 below. Cheshire East's latest LAA monitors aggregates between 1 January 2017 to 31 December 2017. Therefore the landbank figure is based upon the LAA provision within that report.

Table 4-2: Cheshire aggregates land-won sand and gravel landbanks as at 31 December 2018

	2018 sand and gravel Sales (million tonnes)	Permitted Reserves at 31/12/18 (million tonnes)	Average Annual Sales, previous 3-years (million tonnes)	Average Annual Sales 2009 – 2018 (million tonnes)	Landbank as at 31/12/2018 (years) (based on 10 years	LAA Provision figure (million tonnes) (latest available)	Landbank as at 31/12/2018 based on LAA provision

					average sales)		figure (years)
Cheshire East	0.55	2.52[7]	0.43	0.44	5.72 years	0.51*	4.87 years
Cheshire West and Chester	0.80	5.79	0.73	0.59	9.81 years	0.80	7.24 years

*The Council has considered other local information to produce an annual average for future aggregate demand for the next 15 year period (2018-2033). The LAA figure identified has resulted from applying an annual 2% growth rate to the 2018 baseline average 10 year sales figure for the next 15 year period

[7] Not all operators provided a breakdown between aggregates and non-aggregates so this figure is an estimate

Table 4-3 Cheshire aggregate crushed rock sales and reserves 2009 to 2018 (million tonnes)

Monitoring Period	2009	2010	2011	2012	2013	2014	2015	2016	2017	2018
Cheshire[8]	0.001	-	-	-	-	-	-	-	-	-
Cheshire East[9]	-	0.001	0.001	0.001	0.001	0.001	0.002	0.001	0.001	0.001
Cheshire West and Chester[8] (no permitted reserves)	-	-	-	-	-	-	-	-	-	-
Total aggregate crushed rock sales	0.001	0.001	0.001	0.001	0.001	0.001	0.002	0.001	0.001	0.001
Cheshire[7]	4.42	-	-	-	-	-	-	-	-	-
Cheshire East[8]	-	4.29	4.29	4.29	4.29	4.29	4.9	4.9	4.9	4.89
Cheshire West and Chester[8] (no permitted reserves)	-	-	-	-	-	-	-	-	-	-
Total aggregate crushed rock Reserves	4.42	4.29	4.29	4.29	4.29	4.9	4.9	4.9	4.9	4.89

[8] Former Cheshire County Council Area monitored AM95 to AM09
[9] Monitored AM10 onwards

Table 4-4: Cheshire aggregate sand and gravel sales and reserves 2009to 2018

Monitoring Period	2009	2010	2011	2012	2013	2014	2015	2016	2017	2018
Cheshire	0.87	-	-	-	-	-	-	-	-	-
Cheshire East[3]	-	0.42	0.26	0.40	0.41	0.75	0.51	0.46	0.29	0.55
Cheshire West and Chester	-	0.54	0.66	0.56	0.42	0.42	0.6	0.71	0.67	0.80
Total Aggregate Land-won Sand and Gravel Sales	0.87	0.96	0.92	0.96	0.83	1.17	1.11	1.17	0.96	1.35
Cheshire	12.76	-	-	-	-	-	-	-	-	-
Cheshire East[3]	-	1.75	5.6	5.59	5.17	0.65	0.40	0.24	3.70	2.52
Cheshire West and Chester	-	4.42	4.3	4.4[1]	4.5[1]	4.7	8	6.8	6.604	5.79
Total Aggregate Land-won Sand and Gravel Reserves	12.76	6.17	9.9	14.9	13.57	5.35	8.40	7.04	10.3.74	8.31

1. Figures for 2012 and 2013 data originally included Cheshire Sands but have been corrected to remove this as the Section 106 was not signed until January 2015.

Table 4-5: Cheshire aggregate sites surveyed 2018

Site name	Company	Grid Ref	Mineral	Status	MPA	MPA/BAA/ Other Body	End Date
Arclid Quarry	Bathgate Silica Sand Ltd.	SJ 783 613	Silica Sand	Active	Cheshire East Council	MPA/SAMSA	2035
Bent Farm Quarry	Sibelco UK	SJ 831 619	Silica Sand	Active	Cheshire East Council	MPA/ SAMSA	2021
Cherry Orchard Sand Unit	Cherry Orchard Sand Unit	SJ 568 680	Sand	Closed	Cheshire West and Chester Council		Closed
Cheshire Sands[2]	Tarmac Limited	SJ 572 699	Sand	Active	Cheshire West and Chester Council	MPA/ SAMSA	2042
Cobden Farm	Tarmac Limited	SJ 587 673	Sand	Active	Cheshire West and Chester Council	MPA	2021
Dingle Bank Quarry	Sibelco UK	SJ 832 714	Silica Sand	Active	Cheshire East Council	MPA/ SAMSA	2020
Eaton Hall Quarry	Tarmac Limited	SJ 860 655	Silica Sand	Active	Cheshire East Council	MPA	2042
Endon Quarry	Park Skip Hire	SJ 940 763	Sandstone	Active	Cheshire East Council		2042
Forest Hill Quarry	CEMEX UK Material Limited	SJ 612 714	Sand	Active	Cheshire West and Chester Council	MPA	2021
Fourways	Tarmac Limited	SJ 577 690	Sand	Closed	Cheshire West and Chester Council	MPA	Closed
Gawsworth Quarry	O'Gara Developments	SJ 919 679	Sandstone	Inactive	Cheshire East Council		2042
Lee Hills Quarry	Lee Hills Quarry	SJ 928 691	Sandstone	Inactive	Cheshire East Council		2042
Marksend Quarry	A.M & D Earl	SJ 941 757	Sandstone	Active	Cheshire East Council		2042
Mere Farm Quarry	Hanson Quarry Product Europe Limited	SJ 825 746	Sand	Closed	Cheshire East Council	MPA	2014
Rough Hey Quarry	O'Gara Developments	SJ 923 682	Sandstone	Inactive	Cheshire East Council		2042
Sycamore Quarry	A.M & D Earl	SJ 939 766	Sandstone	Active	Cheshire East Council		2042
Town Farm Quarry	P Casey Enviro Ltd.	SJ 565 735	Sand	Active during 2018 period but now closed	Cheshire West and Chester Council	MPA	2019

1. Also Members of SAMSA (Silica and Moulding Sands Association)
2. Incorporates Crown Farm and Delamere Quarries

Monitoring of planning applications

Table 4-6: Planning applications for primary aggregate extraction determined between 1 January and 31 December 2018

	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	-	-	-	-	-	-
Total	**-**	**-**	**-**	**-**	**-**	**-**

Table 4-7: Planning applications for primary aggregate extraction pending as at 31 December 2018

	Aggregate crushed rock		Land-won aggregate sand and gravel	
	Resource (mt)	No. of applications	Resource (mt)	No. of applications
Cheshire East	-	-	3.3	1
Cheshire West and Chester	-	-	(same as above, as the application for Rudheath Lodge is within the Cheshire West and Chester boundary too)	1
Total	**-**	**-**	**3.3.**	**2**

Table 4-8: Planning application details for primary aggregate extraction determined and pending 1 January to 31 December 2018

MPA	Site	Applicant	Application No.	Mineral	Area of Application (ha)	Resource (Tonnes)	Extension / new quarry	Decision / data
Cheshire East and Cheshire West and Chester	Rudheath Lodge, New Platt Lane, Cranage and Allostock	(Sibelco)	17/3605W (Cheshire East) 17/03104/MIN (Cheshire West and Chester)	Silica, and construction sand	75.3ha of which CEC portion is 43 (the remainder being in CWAC)	3.3mt lying beneath a thin layer of soil and overburden. It is estimated that 75% of the deposit will be sold for high quality silica	New Quarry	Not yet determined 17/03104/MIN (Cheshire West and Chester) was

						sand end uses with the balance produced as by-product of processing being used for concreting and mortar sand uses in the construction sector		approved 18 July 2019
Cheshire East	Bent Farm Quarry	Sibelco UK	18/5890W	Silica Sand	73.0	-	Variation of planning conditions 3, 5,6,31,32 and 37 of permission 8/08/0375/ CPO*	Pending

* Condition 3 - to enable extraction to be completed in accordance with an alternative phased extraction scheme. Condition 6 – to enable (i) sand extraction to continue until 31st December 2023, (ii) processing and dispatch of sand to customers until 31st December 2024, (iii) the restoration of the main quarry area to be completed by 30th November 2024 and (iv) the restoration of the processing plant site to be completed by 31st December 2026.

Table 4-9: Environment Act 1995 - summary of aggregate mineral review sites as at 31 December 2018

MPA	Original	Lapsed	Submitted	Determined	With SoS	High Court
Phase I						
Cheshire East Council	6	-	4	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		4	1		
Cheshire West and Chester Council			-	-		

5. Cumbria

5.1. For the purposes of annual monitoring, the Lake District National Park Authority area is included within the Cumbria sub-region.

Aggregate crushed rock sales, reserves and landbank

5.2. Total sales of aggregate crushed rock increased during the 2018 monitoring period from 2.61mt in 2017 to 2.82mt. Sales of High Specification Aggregate (HSA) increased from 0.43mt in 2017 to 0.52mt in 2018. Sales of limestone rose from 1.78mt in 2017 to 1.99mt in 2017. Sales of sandstone/igneous rock (excluding HSA), dropped from 0.41mt in 2017 to 0.31mt in 2018.

5.3. Reserves of crushed rock aggregate fell during the monitoring period from 127mt at 31st December 2017 to 120.89mt on 31st December 2018. The drop is as expected from the sales figure.

Table 5-1: Cumbria aggregate crushed rock Landbank as at 31st December 2018

	2018 Aggregate Sales (million tonnes)	Permitted Reserves at 31/12/18 (million tonnes)	Average Annual Sales, previous 3-years (million tonnes)	Average Annual Sales 2009 – 2018 (million tonnes)	Landbank as at 31/12/2018 (years) (based on 10 years average sales)	LAA Provision figure (million tonnes) (latest available)	Landbank based on LAA provision figure (years)
All crushed rock	2.82	120.89	2.77	2.89	41.82	2.89	41.82

Aggregate sand and gravel sales, reserves and landbank

5.4. Total sales of aggregate sand and gravel dropped during 2018, from 0.79mt in 2017 to 0.71mt in 2018. Landings of marine dredged sand and gravel at Barrow wharves dropped from 8,327 tonnes during 2017 to zero tonnes landed at Barrow in 2018.

Table 5-2: Cumbria aggregate land-won sand and gravel Landbank as at 31st December 2018

	2018 Aggregate Sales (million tonnes)	Permitted Reserves at 31/12/18 (million tonnes)	Average Annual Sales, previous 3-years (million tonnes)	Average Annual Sales 2009 – 2018 (million tonnes)	Landbank as at 31/12/2018 (years) (based on 10 years average sales)	LAA Provision figure (million tonnes) (latest available)	Landbank as at 31/12/2018 based on LAA provision figure (years)
Land-won Sand and Gravel	0.71	7.26	0.77	0.62	11.7	0.77	9.43

Table 5-3: Cumbria aggregate crushed rock sales and reserves 2009-2018

Monitoring Period	2009	2010	2011	2012	2013	2014	2015[10]	2016	2017	2018
Limestone	1.91	2.46	1.84	2.03	1.62	1.9	2.52	1.92	1.78	1.99
Sandstone and igneous rock (excl. HSA)	0.38	0.41	0.37	0.37	0.37	0.3	0.36	0.49	0.41	0.31
High Specification Aggregate (HSA)	0.78	0.59	0.6	0.55	0.41	0.38	0.42	0.48	0.43	0.52
Total sales	3.07	3.46	2.81	2.95	2.4	2.58	3.3	2.89	2.61	2.82
Limestone	103.9	109.8	103.8	99.56	99.17	96.26	97.9	84.26	81.78	81.94
Sandstone and igneous rock	47.81	47.36	24.81	23.41	10.33	29.82	29.5	29.00	29.01	22.84
High Specification Aggregate (HSA)	17.26	13.16	13.81	13.77	11.53	10.98	17.22	16.74	16.56	16.11
Total reserves [11]	168.9	170.3	142.4	136.7	121.03	137.06	144.63	130.00	127.35	120.89

Table 5-4: Cumbria aggregate sand and gravel sales and reserves 2009-2018

Monitoring Period	2009	2010	2011	2012	2013	2014	2015	2016	2017	2018
Land-won aggregate sand and gravel	0.52	0.53	0.46	0.46	0.48	0.68	0.71	0.81	0.79	0.71
Marine dredged aggregate sand and gravel	0.02	0.02	0.01	0.01	0.01	0.02	0.006	0.01	0.008	-
Total aggregate sand and gravel sales	0.54	0.55	0.47	0.47	0.49	0.7	0.716	0.82	0.80	0.71
Land-won aggregate sand and gravel	13.95	11.48	11.1	10.59	9.89	9.2	8.77	7.77	7.38	7.26
Total Aggregate land-won sand and gravel	13.95	11.48	11.1	10.59	9.89	9.2	8.77	7.77	7.38	7.26

[10] Note: Data for 2015 in the 2015 AWP Report contained estimated figures. Operators then reported data which has been included in the 2016 report and this 2017 report.
[11] Excluding slate and those classified by operator as non-aggregate use.

Table 5-5: Cumbria aggregate sites surveyed 2018

Site name	Company	Grid Ref	Mineral	Status	MPA	MPA/ BAA	End Date
Bonnie Mount	J. E. A and S. M Burne	NY 548 313	Sand	Active	Cumbria County Council		2035
Brocklewath	Norbrook Laboratories	NY 348 551	Sand	Inactive	Cumbria County Council		2021
Cardewmires Quarry	Thomas Armstrong Ltd	NY 343 505	Sand and gravel	Active	Cumbria County Council	MPA	2025
Derwent Howe Slag Bank	Thomas Armstrong Ltd	NX 985 285	Slag	Inactive	Cumbria County Council	MPA	2016 – being restored now
Elterwater Quarry	Burlington Slate Ltd	NY 324 048	Secondary aggregate	Active	Lake District National Park Authority		2042
Eskett and Rowrah Quarries	Tendley Quarries Ltd.	NY 054 167	Limestone	Inactive	Cumbria County Council	MPA	2034
Faugh No. 1 Sand Pit	Hanson Quarry Products Europe Limited	NY 512 552	Sand	Inactive	Cumbria County Council	MPA	2024
Faugh No. 2 Sand Pit	Eddie Wannop Limited	NY 512 552	Sand	Active	Cumbria County Council	MPA	2022
Flusco Quarry Silver Fields	Lakeland Minerals Limited	NY 464 293	Limestone	Inactive	Cumbria County Council		2032
Ghyll Scaur Quarry	Aggregate Industries UK	SD 171 828	Igneous Rock (HSA)	Active	Cumbria County Council	MPA	2045
Goldmire Quarry	Neil Price Construction Service Limited	SD 219 739	Limestone	Active	Cumbria County Council		2042
Hartley Quarry	CEMEX RMC (UK) Ltd	NY 787 083	Limestone	Inactive	Cumbria County Council	MPA	2042
Helbeck Quarry	Breedon Group	NY 799 158	Limestone	Active	Cumbria County Council	BAA/ MPA	2042
High House Quarry (Highfield)	D A Harrision	NY 511 252	Sand and gravel	Active	Cumbria County Council		2021 (time extension approved to 2036 in Jan 2019)

Site name	Company	Grid Ref	Mineral	Status	MPA	MPA/ BAA	End Date
Holme Park Quarry	Aggregate Industries UK	SD 536 788	Limestone	Active	Cumbria County Council	MPA	2023 (Time extension to 2043 approved pending S106)
Holmescales Quarry	Aggregate Industries UK	SD 556 869	Sandstone (HSA)	Active	Cumbria County Council	MPA	2042
Kendal Fell Quarry	Mr Pennington	SD 502 925	Limestone	Active	Cumbria County Council/ Lake District National Park Authority		2042
Kirkhouse Quarry	Lakeland Minerals Limited	NY 564 601	Sand and gravel	Active	Cumbria County Council		2023
Low Gelt Quarry	Hanson Quarry Products Europe Limited	NY 512 552	Sand	Active	Cumbria County Council	MPA	2019 (a planning application for a time extension to 2026 was received October 2019)
Low Plains	Tarmac Limited	NY 490 410	Sand and gravel	Active	Cumbria County Council	MPA	2033
Moota Quarry	CEMEX RMC (UK) Ltd	NY 148 361	Limestone	Active	Cumbria County Council	MPA	2024
Overby No. 2 Sand Pit	Thomas Armstrong Limited	NY 125 470	Sand	Active	Cumbria County Council	BAA	2026
Peel Place Quarry	Tendley Quarries	SD 069 011	Sand and Gravel	Active	Cumbria County Council		2025
Roan Edge Quarry	CEMEX RMC (UK) Ltd	SD 584 926	Sandstone (HSA)	Active	Cumbria County Council	MPA	2038
Roosecote Sand Pit	Burlington Aggregates Ltd	SD 224 687	Sand and gravel	Active	Cumbria County Council	MPA/ BAA	2029
Sandside Quarry	Tarmac Limited	SD 482 807	Limestone	Active	Cumbria County Council	MPA	2020 (time extension to 2029 approved pending s.106)

Site name	Company	Grid Ref	Mineral	Status	MPA	MPA/ BAA	End Date
Shap Beck Quarry	Hanson Quarry Products Europe Limited	NY 550 181	Limestone	Active	Extraction in Lake District National Park Authority	MPA	2042
Shap Blue Quarry and Works	CEMEX (UK) Ltd	NY 564 106	Igneous rock	Active	Extraction in Lake District National Park Authority	MPA	2042
Shapfell Limestone Quarry	Tata Steel UK Limited	NY 587 138	Limestone	Inactive	Cumbria County Council		2018
Silvertop Quarry	W & M Thompson (Quarries) Ltd	NY 586 602	Limestone	Active	Cumbria County Council		2042
Snowhill Quarry No. 1	Mr M Smallwood	SD 280 387	Limestone	Inactive	Cumbria County Council		2022
Snowhill Quarry No.2	Mr M Smallwood	SD 280 387	Sandstone with waste sold as secondary aggregate	Inactive	Cumbria County Council		2020
Stainton Quarry	Tarmac Limited	SD 246 729	Limestone	Active	Cumbria County Council	MPA	2042
Tendley Quarry	Tendley Quarries	NY 088 288	Limestone	Active	Cumbria County Council		2029
Shap Pink Quarry	Armstrong Aggregates Ltd	NY 558 084	Igneous	Active	Lake District National Park Authority	BAA	2042
Honister	Honister Slate Co.	NY 223 135	Slate waste sold as secondary aggregate	Active	LDNPA Lake District National Authority	-	2042
Elterwater	Burlington	NY 322 048	Slate waste sold as secondary aggregate	Active	Lake District National Park Authority	-	2042
Kirkby Slate	Burlington	SD 245 836	Slate waste sold as secondary aggregate	Active	Cumbria County Council	-	2042
Wharves							
Silloth Port							
Cavendish Docks							
Railheads							
Barrow Port and rail sidings - Existing							
Kingmoor rail sidings, Carlisle - Existing							
Shap Beck Quarry rail sidings, Shap - Existing							

Site name	Company	Grid Ref	Mineral	Status	MPA	MPA/ BAA	End Date
Shapfell Quarry rail sidings, Shap – Existing							
Shap Blue Quarry rail sidings, Shap – Existing							
Kirkby Thore gypsum works rail sidings, Kirkby Thore – Existing							
Port of Workington and railhead - Potential							
Siddick rail sidings - Potential							

Monitoring of planning applications

Table 5-6: Planning Applications for primary aggregate extraction determined 1 January to 31 December 2018

	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						

Table 5-7: Planning Applications for primary aggregate extraction pending as at 31 December 2018

	Aggregate crushed rock		Land-won aggregate sand and gravel	
	Resource (mt)	No. of applications	Resource (mt)	No. of applications
Cumbria CC	0	0	0	0
Total	**0**	**0**	**0**	**0**

Table 5-8: Planning application details for primary aggregate extraction determined and pending 1 January to 31 December 2018

MPA	Site	Applicant	Application No.	Mineral	Area of Application (ha)	Resource (mt)	Extension/ new quarry	Decision/ data
Cumbria	High House Quarry	D A Harrison	2/18/9010	Sand and Gravel	3.9ha		Site extension but also reduction in previous approved area – no	Approved on 18/01/2019

							additional resource permitted	

Table 5-9: Environment Act 1995 - summary of aggregate mineral review sites as at 31 December 2017

MPA	Original	Lapsed	Submitted	Determined	With SoS	High Court
Phase I						
Cumbria CC	7	-	1		-	-
Phase II						
Cumbria CC	1	-	-	-	-	-
Dormant						
Cumbria CC	27			-		
Goldmire Quarry (Phase 1 Active) ROMP submitted December 2018; (application approved July 2019						

6. Greater Manchester, Merseyside and Halton and Warrington

6.1. The metropolitan boroughs of Greater Manchester (Bolton, Bury, Manchester, Oldham, Rochdale, Salford, Stockport, 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. Total sales of aggregate crushed rock decreased during the 2018 monitoring period from 0.78mt in 2017 to 0.65mt in 2018. This follows a year on year decrease since 2012. However it is important to note that although the sales have dropped, demand for this material has remained constant and need for the material is currently met through imports into Greater Manchester, Warrington and Merseyside and Halton with consumption rates

far exceeding local supply. In addition with planned growth across Greater Manchester in particular as detailed in the GMSF, demand for crushed rock is likely to increase, it is however unclear as to what role local supply will make in meeting this need.

6.3. Reserves of crushed rock aggregate decreased from 18.37mt as at 31 December 2017 to 17.5mt in December 2018. The landbank as at 31 December 2017 based on average sales from 2008 – 2017 was 30.6 years, compared with a landbank of 29.2 at 31 December 2018)

6.4. In 2018 some 0.32 mt of igneous rock from the Glensanda Superquarry in Scotland was landed at Liverpool Wharf.. This material is transported by road to Cheshire, and Lancashire as well as being used elsewhere within the sub-region. Landing of material from Glensanda is not included in Table 6-1 below.

Table 6-1: Greater Manchester, Merseyside and Halton and Warrington aggregate crushed rock landbank as at 31st December 2018 – does not include imported material

	2018 Aggregate Sales (million tonnes)	Permitted Reserves at 31/12/18 (million tonnes)	Average Annual Sales, previous 3-years (million tonnes)	Average Annual Sales 2009 – 2018 (million tonnes)	Landbank as at 31/12/2018 (years) (based on 10 years average sales)	LAA Provision figure (million tonnes) (latest available)	Landbank based on LAA provision figure (years)
Total Crushed Sandstone	0.65	17.5	0.77	0.60	29.2	0.85	20.6

Aggregate sand and gravel sales, reserves and landbank

6.5. The total sales of land-won and marine-won sand and gravel over the monitoring period is at a figure of 0.52mt. This is similar to the figure for 2017 where land and marine-won sand and gravel sales together were at 0.54mt. Demand for this material has remained constant and need for the material is currently met through imports into Greater Manchester, Warrington and Merseyside and Halton with consumption rates far exceeding local supply. In addition with planned growth across Greater Manchester in particular as detailed in the GMSF, demand for sand and gravel is expected to increase,

it is however unclear as to what role local supply will make in meeting this need, especially with existing reserves almost depleted.

6.6. To preserve confidentiality of the land -won figure, it is not possible to break down the total figure to land-won and marine-won this year.

6.7. Reserves of land-won sand and gravel fell again in 2018 as there is only one operational site, whilst the site that became worked-out in 2016 is now only working stockpiles. Due to the confidentiality of figures where there is only one operational sand and gravel quarry, the landbank for aggregate land-won sand and gravel has been based on 3 year averages. Thus, at 31st December 2018 the landbank was 4.8 years based on 10-year average sales or 4.0 years based on the provision in the Local Aggregate Assessment.

Table 6-2: Greater Manchester, Merseyside and Halton and Warrington aggregate land-won sand and gravel landbank as at 31st December 2018

	2018 Aggregate Sales (million tonnes)	Permitted Reserves at 31/12/18 (million tonnes)	Average Annual Sales, previous 3-years (million tonnes)	Average Annual Sales 2009 – 2018 (million tonnes)	Landbank as at 31/12/2018 (years) (based on 10 years average sales)	LAA Provision figure (million tonnes) (latest available)	Landbank as at 31/12/2018 based on LAA provision figure (years)
Land-won Sand and Gravel	0.26	1.20	0.26	0.25	4.8 years	0.3	4.0 years

Table 6-3: Greater Manchester, Merseyside and Halton and Warrington aggregate crushed rock sales and reserves 2009-2018

Monitoring Period	2009	2010	2011	2012	2013	2014	2015	2016	2017	2018
Sandstone	0.3	0.29	0.36	0.81	0.42	0.69	0.79	0.87	0.78	0.65
Imported igneous rock[12]	-	-	-	-	-	-	-	0.65	0.53	0.32[13]
Total aggregate crushed rock sales	0.3	0.29	0.36	0.81	0.42	0.69	0.79	1.52	1.31	0.97
Sandstone	17.23	17.01	20.26	20.06	20.30	21.18	20.43	19.59	18.37	17.5
Total aggregate crushed rock reserves	17.23	17.01	20.26	20.06	20.30	21.18	20.43	19.59	18.37	17.5

Table 6-4: Greater Manchester, Merseyside and Halton and Warrington aggregate sand and gravel sales and reserves 2009-2018

Monitoring Period	2009	2010	2011	2012	2013	2014	2015	2016	2017	2018
Land-won aggregate sand and gravel[14]	0.37	0.22	0.24	0.24	0.24	0.26	0.31	0.26	0.26	0.26
Marine dredged aggregate sand and gravel	0.30	0.26	0.24	0.21	0.30	0.1	0.11[15]	0.26	0.28	0.26
Total aggregate sand and gravel sales	0.67	0.48	0.48	0.45	0.54	0.36	0.42	0.52	0.54	0.52
Land-won aggregate sand and gravel[16]	6.10	4.85	4.76	4.52	4.27	3.86	3.7	1.2	1.2	1.2
Total Aggregate land-won sand and gravel Reserves	6.10	4.85	4.76	4.52	4.27	3.86	3.7	1.2	1.2	1.2

Note: Approximately 50% of operators did not submit a survey form and figures for these quarries have been estimated based on previous years.

[12] Data on imports of igneous rock only reported since 2016.
[13] The sales figures for imported igneous rock are not included in the overall North West sales figures for crushed rock and sandstone/igneous sales.
[14] Years 2016, 2017 and 2018 are a 3-year average to protect confidentiality

[15] Figure has been adjusted in this Report to remove imported crushed rock.
[16] Years 2016, 2017 and 2018 are a 3-year average to protect confidentiality

Table 6-5: Greater Manchester, Merseyside and Halton and Warrington aggregate sites and wharves surveyed 2018

Name	Company	Grid Ref	Mineral	Status	MPA	MPA/BAA	End Date
Sites							
Astley Moss	Breedon Aggregates	SJ 371 500	Sand and Gravel	Active	Salford City Council	MPA/BAA	2022
Bold Heath Quarry	D Morgan Plc	SJ 530 885	Sandstone	Active	St Helens Council		2024
Buckton Vale Quarry	W Maher & Sons	SD 992 016	Sandstone	Active	Tameside Metropolitan Borough Council		2020
Fletcher Bank Quarry	W Maher & Sons	SD 804 170	Sandstone	Active	Bury Metropolitan Borough Council		2036
Fletcher Bank Quarry	PP O'Connor Ltd	SD 804 170	Sandstone	Active	Bury Metropolitan Borough Council		2036
Harrop Edge Quarry	Chartrange (Quarry Products)	SJ 982 959	Sandstone	Inactive	Tameside Metropolitan Borough Council		2042
Harwood Quarry	Booth Ventures	SD 747 124	Sandstone	Active	Bolton Council		2026
Montcliffe Quarry	Armstrongs Aggregates Ltd	SD 656 124	Sandstone	Active	Bolton Council	BAA	2033
Morley's Hall Quarry	Casey	SJ 685 990	Sand and gravel	Active only for stock pile	Wigan		2022
Offerton Quarry	Offerton Sand and Gravel	SJ 928 893	Sand and Gravel	Closed	Stockport Metropolitan Borough Council		Closed
Pilkington Quarry	Armstrongs Aggregates Ltd	SD 622 121	Sandstone	Inactive	Bolton Council	BAA	2026
Southworth Quarry	Gaskell Bros (WM&C) Ltd	SJ 619 940	Sandstone	Active	Warrington Borough Council		2025

Wharves							
Garston Wharf	Hanson Quarry Products Europe Limited	SJ 397 837	Sand	Active	Liverpool City Council	MPA	2024
Mersey Wharf			Sand and gravel	Inactive	Wirral Metropolitan Borough Council		2029
Port of Liverpool (Seaforth Docks)	Aggregate Industries	SJ 323 961	Crushed rock (imports from Glensanda Quarry)	Active	Sefton Metropolitan Borough Council	MPA	2021
Bramley Moore Dock	Tarmac (Mersey Sands JV)	SJ 335 926	sand	active	Liverpool City Council	MPA	

Monitoring of planning applications

Table 6-6: Planning Applications for primary aggregate extraction determined 1 January to 31 December 2018

	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 2018

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

Table 6-8: Planning application details for primary aggregate extraction determined and pending 1 January to 31 December 2018

MPA	Site	Applicant	Application No.	Mineral	Area of Application (ha)	Resource (mt)	Extension/ new quarry	Decision/ data

Table 6-9: Environment Act 1995 - summary of aggregate mineral review sites as at 31 December 2018

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.

7.2. In 2018, there were twelve active crushed rock quarries and six active sand and gravel sites and two sites that were inactive.

Aggregate crushed rock sales, reserves and landbank

7.3. Sales of crushed rock aggregate (limestone and gritstone) rose during the monitoring period from 3.03mt in 2017 to 3.59 in 2018. Sales of crushed limestone increased from 2.10mt in 2017, to 2.60mt in 2018. Sales of crushed gritstone also increased, from 0.93mt in 2017, to 0.99mt in 2018.

7.4. Total crushed rock (limestone and gritstone) reserves were 128.06mt in 2018, a reduction from 131.62mt at 31st December 2017. The limestone reserve was 52.68mt at 31st December 2018, a decrease from the previous year and gritstone reserve was 75.38mt at 31st December 2018, again, a slight decrease from the previous year.

7.5. The length of the aggregate landbank is the sum in tonnes of all permitted reserves for which valid planning permissions are extant, divided by the annual rate of future demand based on the latest annual Local Aggregate Assessment. A comparison of the landbank based on the provision set out in the latest LAA (dated November 2019 is made with the landbank based on average annual sales 2009 – 2018 in Table 7-1 below.

Table 7-1 Lancashire aggregate crushed rock landbank as at 31st December 2018

	2018 Aggregate Sales (million tonnes)	Permitted Reserves at 31/12/18 (million tonnes)	Average Annual Sales, previous 3-years (million tonnes)	Average Annual Sales 2009 – 2018 (million tonnes)	Landbank as at 31/12/2018 (years) (based on 10 years average sales)	LAA Provision figure (million tonnes) (latest available)	Landbank based on LAA provision figure (years)
Limestone	0.5	52.68	2.36	1.92	27.43 years	2.36	22.0 years
Gritstone	0.99	75.38	1.18	1.18	63.88 years	1.18	64.0 years
Total Crushed Rock	1.49	128.06	3.54	3.10	91.31 years	3.54	86.0 years

Aggregate sand and gravel sales, reserves and landbank

7.6. Land-won aggregate sand and gravel sales decreased slightly from 0.51mt in 2017 to 0.5mt in 2018. Sales over the past 3 years have been fairly stable. Reserves of sand and gravel have decreased from 6.42mt in 2017 to 5.9mt in 2018.

7.7. A comparison of the landbank based on the provision set out in the latest LAA (November 2019 is made with the landbank based on average annual sales 2008 – 2018 in Table 7-2 below.

Table 7-2 Lancashire aggregate land-won sand and gravel landbank as at 31st December 2018

	2018 Aggregate Sales (million tonnes)	Permitted Reserves at 31/12/18 (million tonnes)	Average Annual Sales, previous 3-years (million tonnes)	Average Annual Sales 2009 – 2018 (million tonnes)	Landbank as at 31/12/2018 (years) (based on 10 years average sales)	LAA Provision figure (million tonnes) (latest available)	Landbank as at 31/12/2018 based on LAA provision figure (years)
Land-won Sand and Gravel	0.50	5.90	0.50	0.43	13.72 years	0.50	12 years

Table 7-3: Lancashire aggregate crushed rock sales and reserves 2009-2018

Monitoring Period	2009	2010	2011	2012	2013	2014	2015	2016	2017	2018
Limestone	1.86	1.59	1.55	1.5	1.48	1.81	2.35	2.37	2.10	2.60
Gritstone	0.66	0.63	0.86	0.94	0.67	0.99	0.95	1.24	0.93	0.99
Total aggregate crushed rock sales	2.52	2.22	2.41	2.44	2.15	2.81	3.3	3.61	3.03	3.59
Limestone	67.63	65.61	62.5	60.64	59.16	49.28	60.7	58.03	55.57	52.68
Gritstone	69.14	67.63	66.0	71.42	71.05	70.83	77.9	77.9	76.05	75.38
Total aggregate crushed rock reserves	136.77	133.24	128.5	132.1	130.21	120.07	138.58	135.93	131.62	128.06

Table 7-4: Lancashire aggregate sand and gravel sales and reserves 2009-2018

Monitoring Period	2009	2010	2011	2012	2013	2014	2015	2016	2017	2018
Land-won aggregate sand and gravel	0.42	0.37	0.25	0.36	0.36	0.48	0.56	0.50	0.51	0.50
Marine dredged aggregate sand and gravel	-	-	-	-	-	-	-	-	-	-
Total aggregate sand and gravel sales	0.42	0.37	0.25	0.36	0.36	0.48	0.56	0.50	0.51	0.50
Land-won aggregate sand and gravel	8.98	8.81	8.6	8.36	8.18	8.24	7.76	6.97	6.42	5.90
Total Aggregate land-won sand and gravel Reserves	8.98	8.81	8.6	8.36	8.18	8.24	7.76	6.97	6.42	5.90

Note: Approximately 50% of sand and gravel operators did not submit a return and figures for these sites have been estimated. Approximately 40% of crushed rock operators (gritstone) did not submit a return and figures for these sites have been estimated.

Table 7-5: Lancashire aggregate sites surveyed 2018

Name	Company	Grid Ref	Mineral	Status	MPA	MPA/ BAA	End Date
Back Lane Quarry	Aggregate Industries UK	SD 510 695	Limestone	Active	Lancashire County Council	MPA	2045
Bankfield Quarry	Tarmac Limited	SD 755 435	Limestone	Active	Lancashire County Council	MPA	2018
Bellman Quarry	Hanson Cement Ltd	SD 761 428	Limestone	Active	Lancashire County Council	MPA	2027
Bradley's Sand Pit	J A Jackson	SD 512 340	Sand and gravel	Active	Lancashire County Council		2021
Brinscall Quarry	Armstrong Aggregates	SD 633 421	Sandstone	Active	Lancashire County Council		2042
Dalton Brickworks Quarry	Ibstock Brick Limited	SD 501 091	Clay and shale(1)	Active	Lancashire County Council		2042
Dunald Mill	Tarmac Limited	SD 511 679	Limestone	Inactive	Lancashire County Council		2021
Foreshore St Annes	William Rainford	SD 313 300	Sand and gravel	Active	Lancashire County Council		2020
German Lane Quarry	P Casey Enviro Ltd	SD 562 171	Sand	Inactive	Lancashire County Council		2042
Jamestone Quarry	W.Maher & Sons	SD 758 233	Sandstone	Active	Lancashire County Council		2042
Lanehead	Tarmac Limited	SD 752 437	Limestone	Active	Lancashire County Council	MPA	2027
Leapers Wood	Tarmac Limited	SD 515 694	Limestone	Active	Lancashire County Council	MPA	2045
Leeming	Brown Bros (Longridge) Ltd	SD 683 406	Limestone	Active	Lancashire County Council		2042
Lower Brockholes	Hargreaves	SD 578 304	Sand and gravel	Closed	Lancashire County Council		-
Lydiate Lane Quarry	JA Jackson	SD 554 239	Sand and gravel	Active	Lancashire County Council		2030
Runshaw	Tarmac Limited	SD 543 195	Sand	Inactive	Lancashire County Council	MPA	2026

Sandons Farm	Chorley Sand	SD 592 131	Sand and gravel	Active	Lancashire County Council		2020
Scout Moor	Marshalls Natural Stone	SD 814 190	Sandstone	Active	Lancashire County Council	MPA/BAA	2042
Sharples Farm	Hargreaves	SD 472 428	Sand and gravel	Active	Lancashire County Council		2027
Tong Farm	J Laycock	SD 880 225	Clay and shale	Active	Lancashire County Council		2042
Waddington Fell	Armstrongs Aggregates Ltd	SD 718 479	Sandstone	Active	Lancashire County Council	MPA	2022
Whinney Hill Quarry	Park Royal Aggregates	SD 756 30	Sandstone	Active	Lancashire County Council		2042
Whitworth Quarry	Fairhurst Stone	SD 875 202	Sandstone	Active	Lancashire County Council	MPA	2042

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 2018

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

Table 7-7: Planning Applications for primary aggregate extraction pending as at 31 December 2018

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

Table 7-8: Planning application details for primary aggregate extraction determined and pending 1 January to 31 December 2018

MPA	Site	Applicant	Application No.	Mineral	Area of Application (ha)	Resource (mt)	Extension/ new quarry	Decision/ data
-	-	-	-	-	-	-	-	-
-	-	-	-	-	-	-	-	-

Table 7-9: Environment Act 1995 - summary of aggregate mineral review sites as at 31 December 2018

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), publishes reserve and dredge statistics on an annual basis[17]. The report 'Marine Aggregates the Crown Estate Licences Summary of Statistics 2018' 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 (2019). In addition, The Crown Estate and BMAPA publish a summary of the extraction activity in the Area Involved Report, the 21st of which was published in 2019. 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 Region.

8.2. During the 2018 monitoring period there were three active dredging licences operating in water off the North West coast.

Table 8-1: North West marine licences and dredging areas 2018

Area no:	Area name	Licence type	Licence holder	Operational status 2018
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

8.3. A total of 290,000 tonnes of material was removed from permitted dredging areas off the North West coast during the 2018 monitoring period. This is a decrease from the year before when the total was 321,090 tonnes. This is due to the material removed in 2017 consisting solely of primary aggregates. In comparison, in 2018, 288,496 tonnes of primary aggregate comprised of the total permitted removal. This is equivalent to 24% of the total permitted removal. The remainder was contract fill which was likely used in the construction of L2 at the Port of Liverpool.

8.4. Of the total 1,200,000 tonnes of material removed, 281,839 was landed at permitted landing points within the North West. Landing within the North West (excluding landings

[17] http://www.thecrownestate.co.uk/en-gb/resources/downloads/

at Penrhyn) has decreased from 286,944 tonnes in 2017 to a total of 258,070 tonnes during 2018. The reason for this decrease is because there were no landings at Barrow wharves in 2018, with Liverpool Wharves being the only active landing location. The amount of marine aggregate landings decreased in 2018 as well.

8.5. The 'Marine Aggregates Capability and Portfolio document 2018' reports that 1.3 million tonnes can be extracted from 3 licenses annually which when compared to the 10-year average annual off take rate would provide a reserve life of approximately 42 years. There is currently one application pending a decision in the area which would release an additional 0.5mt of reserve.

Table 8-2: Marine dredged aggregate removed from off the North West coast 2009-2018

North West		2009	2010	2011	2012	2013	2014	2015	2016	2017	2018
Primary	Aggregate	307,509	314,098	285,368	378,813	251,424	378,813	260,649	307,074	321,090	288,496
	River & Misc	39,458	0	0	0	0	0	0	0	0	0
Secondary	Beach nourishment	0	0	0	480,000	268,959	480,000	0	0	0	0
	Contract fill	9,000	0	309,300	0	0	0	1,786,250	854,526	0	0
Total aggregates removed		**840,051**	**355,967**	**314,098**	**594,668**	**858,813**	**520,383**	**2,046,899**	**1,161,600**	**321,090**	**288,496**
Authorised limit of removal (mt/pa)		**1.38**	**1.26**	**1.33**	**1.43**	**0.99**	**1.31**	**1.3**	**1.3**	**1.3**	**1.2**

Table 8-3: Marine dredged aggregate landed at North West coastal wharfs 2009 - 2018

Landing Point	2008	2009	2010	2011	2012	2013	2014	2015	2016	2017	2018
Barrow	23,319	23,111	15,592	12,333	9,831	11,805	3,790	5,905	10,226	8,327	-
Eastham	87,787	92,263	40,012	-	-	-	-	-	-	-	-
Heysham	11,930	-	-	-	-	-	-	-	-	-	-
Liverpool	327,094	209,766	223,206	238,880	205,528	303,696	202,074	209,939	260,398	278,617	258,070
Penrhyn	54,901	27,133	53,088	53,302	62,361	53,700	35,074	37,012	31,807	27,169	23,769
Total	505,031	352,273	331,898	304,515	277,720	369,201	241,578	252,856	302,431	314,113	281,839
Total exc. Penrhyn	**450,130**	**325,140**	**278,810**	**251,213**	**215,359**	**315,501**	**206,504**	**215,844**	**270,624**	**386,944**	**258,070**

9. Secondary and Recycled Aggregates

9.1. Recycled Aggregate, which includes 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 waste, 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 204) 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 licence and can be monitored, much recycling and re-use occurs on individual construction sites, is temporary in nature and does not produce data. Attempts by the AWP to fill this data gap through the 2019 survey have produced insufficient data, and the information returned by operators has been limited.

9.4. The data is from the Environment Agency Waste Data Interrogator 2018.

9.5. Table 9-1 below shows the CD&E Arising's produced and handled in the North West (Environment Agency Waste Data Interrogator 2014, 2015, 2016, 2017 and 2018)

Table 9-1: CD&E Arising's produced and handled in the North West (Environment Agency Waste Data Interrogator 2014, 2015, 2016, 2017 and 2018)

Minerals Planning Authority	2014		2015		2016		2017		2018	
	Produced	Handled	Produced	Handled	Produced	Handled	Produced	Handled	Produced	Handled
Cheshire East	40,899	567,960.8	78,716.6	715,491.9	139,830	887,765	170,371	662,037	213,934	463,709
Cheshire West and Chester	28,850.1	151,911.9	29,163.2	170,089.1	28,874	68,789	94.303	144.336	93,128	258,350
Cheshire	**69,749.1**	**719,872.7**	**107,879.7**	**885,580.9**	**168,703**	**956,554**	**264.674**	**806,373**	**307,062**	**722,059**
Cumbria	**709,868.5**	**857,473.3**	**777,083.0**	**1,028,040.5**	**762,126**	**984,680**	**861.088**	**1,031,010**	**697,940**	**1,094,532**
Greater Manchester	2,340,592.8	2,887,321.2	2,793,823.0	2,868,223.8	2,605,920	2,863,791	2,720,652	3,152,362	2,507,943	3,232,810
Merseyside	424,324.1	886,209.8	505,994.6	1,169,322.5	1,163,644	1,330,523	590,541	1,075,822	961,280	1,326,114
Warrington	123,781.9	1,025,541.8	197,756.8	625,784.3	100.292	328,981	180,526	606,913	456,904	523,480
Greater Manchester, Merseyside & Warrington	**2,888,698.8**	**4,799,072.7**	**3,497,574.4**	**4,663,330.6**	**3,869,857**	**4,523,295**	**3,491,720**	**4,835,097**	**3,926,127**	**5082404**
Lancashire	**1,649,305.7**	**1,927,558.6**	**1,534,296.1**	**1,877,895.0**	**1,404,443**	**1,738,882**	**1,786,471**	**1,906,142**	**1,169,978**	**1,736,082**

Appendix 1: AWP Membership

Aggregate Working Party Representatives	
Chairperson	**Carolyn Williams** Group Leader Minerals and Waste Urban Vision Parntership Ltd 1st Floor, Salford Civic Centre, Chorley Road, Swinton, Salford, M27 5AW Tel: 0161 604 7746 carolyn.williams@urbanvision.org.uk
Technical Secretary (July 2018)	**Mike Halsall** Principal Planning Officer Urban Vision Parntership Ltd 1st Floor, Salford Civic Centre, Chorley Road, Swinton, Salford, M27 5AW Tel: 0161 779 6096 mike.halsall@urbanvision.org.uk
Technical Secretary (November 2018)	**Duncan McCorquodale** Associate Planner Urban Vision Parntership Ltd 1st Floor, Salford Civic Centre, Chorley Road, Swinton, Salford, M27 5AW Duncan.McCorquodale@urbanvision.org.uk
Government Representative	

Department for Communities and Local Government	**Vicky Engelke** Planning for Minerals and Sustainable Waste Management Team MHCLG, Planning Directorate Infrastructure and Environment Division, Third Floor Fry Building, 2 Marsham Street, London SW1P 4DF Tel: 0303 44 41654 Vicky.engelke@communities.gsi.gov.uk
The Crown Estate	**Rob Anderson** The Crown Estate, 1 St James's Market, London, SW1Y 4AH robert.anderson@rhdhv.com
Local Government Representatives	
Cheshire East Council	**Sally Gibbon** Strategic Planning, Cheshire East Council, Westfields, Middlewich Road, Sandbach, Cheshire CW11 1HZ
Cheshire West and Chester	**Catherine Morgetroyd** Cheshire West and Chester Council, 4 Civic Way, Ellesmere Port, CH65 0BE
Cumbria	**Rachel Whaley** Minerals & Waste Planning Policy, Cumbria County Council, County Offices, Busher Walk, Kendal, Cumbria LA9 4RQ
Environmental Advisory Service (Merseyside)	**Lucy Atkinson** Merseyside Environment Advisory Service, 2nd Floor, Magdalen House, Trinity Road, Bootle, Liverpool, L20 3NJ
Urban Vision Partnership Ltd (Greater Manchester)	**Carolyn Williams** Urban Vision Parntership Ltd, 1st Floor, Salford Civic Centre, Chorley Road, Swinton, Salford, M27 5AW
Lancashire County Council	**Richard Sharples** Planning and Environment, Lancashire County Council, County Hall, 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** Economic Regeneration, Growth and Environment, 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	**Trefor Evans** 4 Bluebell Close, Boughton Vale, Rugby, Warwickshire, CV23 0UH
British Marine Aggregate Producers Association	**Andrew Bellamy** Tarmac Marine, Drayton House, Drayton Lane Chichester
Cemex UK	**Rob Masrden** Cemex UK Operations Limited, Coldharbour Lane, Thorpe, Egham, Surrey TW20 8TD
Hanson Heidelberg Cement Group	**Tom Brown** Hanson Aggregates, Clifford House, Wetherby Business Park, York Road, Wetherby, West Yorkshire LS22 7NS
Minerals Products Association	**Nick Horsley** Minerals Products Association, 38-44 Gillingham Street, London SW1V 1HU
Sibelco UK Ltd	**Mike Hurley or Maria Cotton** Sibelco UK Ltd, Brookside Hall, Congleton Road, Sandbach, Cheshire CW11 4TF
Tarmac	**Grahame Fyles or Matthew Pixton** Tarmac, Tunstead House, Buxton, Derbyshire SK17 8TG
Marshalls	**Gary Redfern** Landscape House, Premier Way, Lowfields Business Park, Elland, W Yorks, HX5 9HT
Marine Management Organisation	**Nat Percival** **MMO, Lancaster House, Hampshire Court, Newcastle upon Tyne, NE4 7YH.**

Appendix 2: AWP Activities

There were two AWP meetings held during 2018:

- 9th July 2018
- 22nd November 2018

Minutes of North West AWP Meeting 9th July 2018

1pm, 5th Floor, Churchgate House, 56 Oxford Street, Manchester, M1 6EU

Chair: Carolyn Williams GMCA

Secretary: Mike Halsall Urban Vision

Attendees:

Carolyn Williams	GMCA	Mike Halsall	Urban Vision
Geoff Storey	Aggregate Industries UK	Richard Sharples	Lancashire
Nick Horsley	MPA	Claire Woodward	Cheshire West and Chester
Robert Anderson	Crown Estates	Grahame Fyles	Tarmac
Sally Gibbon	Cheshire East	Rachel Whaley	Cumbria
Andrew Bower	MPA (Hanson)		

Apologies:

Catherine Morgetroyd	Cheshire West and Chester	Trefor Evans	BAA
Gary Redfern	Marshalls	Matthew Pixton	Tarmac
Kevin Usher	Warrington	Gary Nancarrow	North Wales AWP
Stuart Penny	Cheshire East	Lucy Atkinson	MEAS
Steve Gaines	Sibelco UK Ltd		

Item	Description

1	Introductions and apologies
2	Minutes of previous meeting dated 13th October 2017
3	AM2018 – Presentation of draft report
4	Progress on Local Aggregate Assessments (2017 data) – *authorities to update*
5	MHCLG and next 4 yearly aggregates survey
5	National Coordinating Group – *update from Chair*
6	Duty to Cooperate and Statements of Common Ground
7	Industry update
8	MPAs update
9	AOB
10	Date of next meeting

1. Introduction and apologies

1.1. Carolyn Williams (CW) welcomed everyone to the meeting.

2. Minutes of previous meeting dated 13th October 2017

2.1. Minutes were approved with no changes proposed.

3. Draft AM2018 – Presentation of draft report

3.1. Mike Halsall (MH) gave an overview of the key figures from the latest report

- Cheshire East and Cheshire West and Chester have already emailed with suggested changes

- Grahame Fyles (GF) raised an issue with paragraph 4.3 and the split between industrial and non-industrial aggregates in Cheshire East

- Sally Gibbon (SG) agreed to make changes to figures if GF wishes to present a more realistic split – 65% industrial was suggested

- SG and GF to discuss and SG to send changed figures to MH for incorporation into the report

- Geoff Storey (GS) noted that end dates were missing from some of the tables of quarries and one quarry changed hands in 2018 and so could be a footnote in this year's report so will be changed in the next report

- CW noted that Mark North (MPA) had identified at other AWP meetings (East Midlands and Yorkshire and Humber) that a national picture of the movement of material is missing. CW explained that she was coordinating a national picture from reviewing all AMRs across the Country

- GS suggested that this should also include high specification aggregates

- Nick Horsley (NH) suggested this should also include Wales
- CW agreed to contact the Welsh AWPs
- CW invited any further comments on the draft report by end of July 2018

ACTION – MH will incorporate all comments into a third draft report, to be issued in August. CW to contact Welsh AWP chairs to build a picture across England and Wales.

4. Progress on Local Aggregate Assessments (2017 data)

4.1. Cheshire West and Chester's report containing 2016 data is now ratified (was informally ratified by email in Dec 2017). LAA with 2017 data has already been circulated to AWP members with comments requested by end of July.

4.2. Lancashire's LAA (2017 data) has also been issued for comments

- NH and GS suggested that the economic forecasting underplays the importance of the minerals industry.
- Richard Sharples (RS) explained that he has used housing projections and there is not the budget in the Council to undertake an in-depth analysis of economic forecasts. RS suggested that this therefore be removed from the LAA and just base minerals requirements on past 3 yr average.
- It was generally agreed this would be a better idea and NH will review a revised version of the LAA when RS issues another draft.
- MH explained that GM, Merseyside, Warrington and Halton's LAA will be issued end of July/early August for comment.
- SG and Rachel Whaley (RW) also said their LAAs would be circulated in August.

ACTION – LAAs to be circulated for comment

5. MHCLG and next 4 yearly aggregates survey

5.1. CW is writing to Simon Gallagher at MHCLG to outline the importance of MASS, AWP funding and 4 yearly surveys.

5.2. NH has raised the issue with AMRI and BGS.

ACTION – CW to circulate draft letter for comment

6. National Coordinating Group – update from Chair

6.1. CW queried whether there is anyone at MHCLG in charge of minerals

6.2. NH explained he has a meeting and there a number of people involved. We should keep Vicky Engelke included on AWP emails.

6.3. CW is arranging a meeting of AWP chairs and secretariats to discuss general issues with reporting etc. for 18th October but this is not to replace the NCG meeting.

7. Duty to Cooperated and Statements of Common Ground

7.1. RS requested the item on the Agenda to see what other Authorities had done

7.2. RW explained that Cumbria had produced a Statement of Common Ground with the Lake District National Park.

7.3. CWo outlined that Cheshire West and Chester have a pilot programme with Warrington, as does West Lancs.

8. Industry update

8.1. NH provided an economic update from MPA which included the following text from Mark North.

• MPA MARKET SALES VOLUMES. The latest MPA data cover sales volumes up to 2018Q1, seasonally and non-seasonally adjusted. Sales volumes for asphalt and aggregates fell by 4.8% and 4.9% respectively in 2018Q1 compared to the previous quarter, and ready-mixed concrete (RMC) by 7.7%. Mortar sales, which received a significant boost from housebuilding in recent quarters, contracted by 3.8% in 2018Q1. MPA is currently in the process of collecting the sales volume for 2018Q2, which will be published at the end of Jul-18.

• ECONOMIC OUTLOOK. Economists expect 2018Q2 to have seen a rebound in the form of a catch-up from the poor first quarter GDP growth. Recent data however have been mixed, indicating that the potential for catch up may be limited. Beyond Q2, the outlook has not changed materially: the CBI expects GDP growth of 1.4% this year and 1.3% in 2019. Growth in exports is meant to provide a boost to UK growth but the risks seem skewed on the downside given current tensions between the US and its major trading partners.

• CONSTRUCTION. Construction output continued to decline in the 3 months to Apr-18, down 3.4% (£1.4bn) compared to the previous 3 months, with falls across all sub-sectors of construction, except industrial new work. Data on new contracts from Barbour ABI point to continued but subdued construction activity in the near-term, primarily driven by housing.

• The Asphalt Industry Alliance (AIA) & ALARM Survey

Each year the AIA commissions an independent survey of local authority highway departments in England and Wales, the Annual Local Authority Road Maintenance (ALARM) Survey, which takes a snapshot of the general condition of the local road network, based on information provided directly by those responsible for its maintenance, thus providing a means of tracking any improvement or deterioration. March 2018 saw the 23rd annual survey with findings covering the financial year 2017/18. The survey highlights that you could drive almost around the world on the length of roads in England and Wales that could fail in the next 12 months. It would take 14 years to get local roads back into a reasonable steady state, with total funding needed in excess of £9 Billion to deal with potholes.

8.2 GS considers that the outlook for Q1 is not necessarily indicative of the industry as this was hampered by poor weather.

8.3 GS said that dewatering was raised at the Yorks AWP meeting – dewatering consents is slowing site progress and holding up the issuing of planning permissions where there are sensitive ecological sites in the vicinity as the EA and Natural England will not approve – pragmatic approach requested from LPAs.

8.4 Robert Anderson (RA) provided an update for the Crown Estate and explained that he would circulate links to new website where data can be sourced.

9. MPA Updates

9.1. Latest Local Plan situations are provided within the AWP report.

9.2. CW outlined that there has been recent interests in mineral sites in GM from industry

9.3. CWo noted that a silica sand site was only major proposal in pipeline in Cheshire West and Chester

10. AOB

10.1GS outlined that housing proposals in close proximity to minerals infrastructure is worrying. Highlighting Back Lane quarry in Lancashire/Lancaster

10.2 RS stated that the County has made comments on the site through the Local Plan consultation process

10.3 CWo stated that their Local Plan Hearings would be taking place in mid-Sept

11. Date of next meeting

11.1 The next meeting will be after the chairs/secretariat meeting on 18th October. – MH to circulate proposed dates.

Minutes of North West AWP Meeting 22nd November 2018

11am, 8th Floor, Observatory, Chapel Walks, Manchester

Chair: Carolyn Williams GMCA

Secretary: Duncan McCorquodale Urban Vision

Attendees:

Carolyn Williams	GMCA	Duncan McCorquodale	Urban Vision
Nick Horsley	MPA	Richard Sharples	Lancashire
Trefor Evans	BAA	Catherine Morgetroyd	Cheshire West and Chester
Sally Gibbon	Cheshire East	Rachel Whaley	Cumbria
Andrew Bower	MPA (Hanson)	Kevin Usher	Warrington

Apologies:

Geoff Storey	Aggregate Industries UK	Matthew Pixton	Tarmac
Gary Redfern	Marshalls	Gary Nancarrow	North Wales AWP
Stuart Penny	Cheshire East	Lucy Atkinson	MEAS
Steve Gaines	Sibelco UK Ltd	Robert Anderson	Crown Estates
Grahame Fyles	Tarmac		

Item	Description
1	Introductions and apologies
2	Minutes of previous meeting dated 9th July 2018
3	AM2018 – Discussion and approval of final draft
4	Progress on Local Aggregate Assessments (2017 data) – Ratification of: Cheshire West & Chester, Cheshire East, Cumbria and Lancashire LAA's
5	MHCLG and next 4 yearly aggregates survey
6	Duty to Cooperate and Statements of Common Ground – AWP's role

7	Industry update – MPA Construction & markets NW information
8	MPAs update
9	AOB
10	Date of next meeting

1. Introduction and apologies

1.1. Carolyn Williams (CW) welcomed everyone to the meeting.

2. Minutes of previous meeting dated 9th July 2017

2.1. Minutes approved with following points noted and changes agreed:

- Item 3.1
  - SG confirmed changes made to Cheshire East figures
  - CW noted contact with Welsh AWPs yet to happen
- Item 4.2
  - Delete wording at end as follows - RS suggested that this therefore be removed from the LAA ~~and just base minerals requirements on past 3 yr average.~~
- Item 5.1
  - Letter to MHCLG yet to be sent (see Item 5 on this agenda for further info)
- Item 6.3
  - Meeting with AWP chairs and secretariats didn't happen on 18th October. Rescheduled but no date fixed yet.

3. AM2018 – Discussion and approval of final draft

3.1. CW invited comments on the draft. NH identified a number of points including:

- Add more detail to the section on Greater Manchester (Merseyside section is a good example). CW noted information on Greater Manchester Spatial Framework (GMSF) could be added.
- Para 3.2 – clarify whether sand and gravel exclusion point refers to both 2016 and 2017.
- Para 3.4 – remove "substantially" and replace HAS with HSA.
- Para 3.6 – "at least" should refer to individual MPAs not the region.
- Table 3.2 – observation on drop in limestone sales and reserves despite plans for growth (implications on imports and sufficiency of reserves elsewhere). CW will add comment on this into the AMR

ACTION – final amendments to be agreed by email by end of December 2018

4. Progress on Local Aggregate Assessments (2017 data)

4.1. General discussion took place before updates from each authority covering the need for a more uniform approach to the layout and presentation of information in the LAAs. Also noted need for LAAs to be forward looking in terms of assessing likely requirements rather than relying on past trends/sales. Some discussion on the need for a standard methodology in producing key information for LAAs. CW suggested a workshop session to add on to a future AWP meeting. NH suggested adding in points from discussion to letter to MHCLG from CW. The MPA has a meeting with MHCLG on 6th December so would be useful for the letter to have been received before then.

ACTION – CW to add in session on production of LAAs for next AWP meeting (likely to be March 2019).

4.2. Lancashire

- RS highlighted points on economic information in the LAA and information in Appendix 2 setting out demand predictions based on expected housing delivery set out in local plans.
- NH noted need to be realistic on use of secondary/recycled aggregates and how this is presented in the LAA. Also clarification needed on marine dredged material in imports and exports calculations. Highlighted the continued reliance on sand and gravel; and gritstone reserves tied up in a few sites. Consistency in the use of terminology with respect to sandstone/gritstone was also highlighted.
- RS noted useful to have comments on limitations identified above. Point with respect to reliance on a few sites is being addressed by the emerging local plan.

ACTION – Lancashire LAA accepted by AWP

4.3. Cheshire West and Chester

- CM noted minor changes made as a result of comments received.
- NH picked up need to check data in Tables 4 and 9 to ensure the data correlated (particular issue around change form 2009 and 2010). It may need some cross checking with Cheshire East LAA.

ACTION – CM to check figures in Tables 4 and 9. CM and SG to liaise to check consistency between CWAC and CE LAAs.

4.4. Cumbria

4.4.1. RW noted comments taken on board in revised LAA. Summary at the end of the LAA will be brought forward to be executive summary.

4.4.2. NH noted some additional points: Para 1.8 – need to separate out secondary/recycled and marine into two paragraphs; Para 1.10 – note top down approach not been replaced; Para 1.15 – note landbank requirements are “at least”; and Para 6.23 – secondary and recycled usage is an aspiration?

5. MHCLG and next 4 yearly aggregates survey

5.1. CW noted expectation that MHCLG will extend AWP contracts for a further 12 months.

5.2. Letter to MHCLG could also include point that 12 month extension is ultimately not helpful for longer term planning of AWP work.

5.3. TE highlighted recent meetings with key MPs to keep pressure on for longer term funding but progress currently slow on moving the agenda forward.

5.4. CW highlighted meeting of the Minerals Planning Advisory Group where BGS funding to update information on mineral reserves was discussed. NH noted updates by BGS were currently scheduled for July 2019.

ACTION – CW to add further points into MHCLG draft letter and then send on to MHCLG (note MPA meeting on 6th December with Simon Gallagher at MHCLG).

6. Duty to Cooperated and Statements of Common Ground – AWPs role

6.1. Discussion on role of AWPs as identified by latest Planning Practice Guidance (PPG). General consensus that it is not clear how AWPs will fulfil this function as signatories to Statements of Common Ground. TE noted similar discussion held at West Midland AWP recently.

7. Industry update

7.1. NH briefly noted key points from the slides circulated the meeting (Construction and Markets North West). Essentially the slides provide a "state of the economy" report and he welcomed any feedback on the content.

- CW highlighted the intra-regional flows was very useful.
- CW also suggested the points made in the covering email would be useful to incorporate into the slides to ensure suitable caveats were understood when looking at the information.

7.2. NH noted the MPA members conference held earlier this week and drew out some key issues discussed:

- Replenishment rates on annual and ten year averages
    - Crushed Rock at 69% (10 year average) and 3% (annual); and
    - Sand and Gravel 53% (10 year average) and 24% (annual).

7.3. NH raised the issue of 2042 mineral permissions and need to consider likelihood of reserves post 2042. Another issue that is coming to the fore is dealing with abstraction licences and impacts on new permissions.

7.4. National Parks Review underway – concern that minerals issue do not appear to feature in the review.

7.5. General member concerns on bringing sites forward and cost associated. Discussion widened out to global context and how businesses decisions impacted particularly for companies with global operations.

7.6. TE highlighted concerns about loss of sand and gravel reserves as a result of housing permissions; and similar issues with the loss of infrastructure (e.g. landing wharves). CW noted the agents of change principle in NPPF should help to address this matter.

7.7. CW reported the Crown Estates North West Markets Study was yet to be published.

8. MPA Updates

8.1. Latest Local Plan situations were provided.

8.2. Greater Manchester

- Reviewed GM Minerals Plan earlier in the year to assess need for any update.
- Contact made with industry representative regarding potential new sites.
- GMSF – providing input including writing minerals policies. GMSF consultation expected early 2019.
- Applications in Wigan (withdrawn application for sand and gravel) and one received in Tameside with another expected in 2019 (crushed rock).

8.3. Warrington

- Local Plan review – next consultation expected in March 2019.
- No applications received.

8.4. Lancashire

- Local Plan consultation closes 28th November 2018. Expecting to submit in summer 2019.
- Some applications received but no information available for the meeting.

8.5. Cheshire West and Chester

- Local Plan Part 2 hearing concluded. Main modifications currently being agreed with the Inspector.
- Rudd Heath application (jointly with Cheshire East) – awaiting determination.

8.6. Cheshire East

- Draft Minerals and Waste Plan expected summer 2019. Delays due to focus on Community Infrastructure Levy and an Area Action Plan for Crewe.
- Rudd Heath application approved for Cheshire East part of the site.

8.7. Cumbria

- Lake District NPA review of local plan – consultation concluded.
- Application for coal extraction resubmitted (West Cumbria).

9. AOB

9.1 NH noted the Minerals Strategy previously circulated at the AWP has met with positive feedback from Government.

10. Date of next meeting

ACTION –CW will send out details for next meeting and book room at the Observatory in due course (Wednesday or Thursday preferred days).

Appendix 3: Acronyms

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
Mt.	Million Tonnes
NCG	National Co-Ordinating Group
NFDC	National Federation of Demolition Contractors
NPPF	National Planning Policy Framework
NPPG	National Planning Practice Guidance
UDP	Unitary Development Plan