

North West Aggregates Working Party

Annual Monitoring Report 2024
(2023 Data)

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Contents

Acronyms.....	4
Glossary.....	5
Introduction	7
Executive Summary	7
Mineral Planning Authorities in NWAWP Area.....	10
Primary Aggregates	11
Location of quarries, wharves and rail depots.....	11
Location of offshore aggregate production areas.....	12
Primary Aggregates	13
Sales and Imports	13
Permitted Reserves	16
Landbank in NWAWP Area.....	19
Secondary and Recycled Aggregates.....	21
Survey Data	22
Development Plans and Mineral Policies in NWAWP Area	23
Aggregates sites and planning applications in NWAWP Area	25
Local Aggregate Assessments	36
Local and National Aggregate Need	37
Trends and Analysis	38
Major Construction Projects or Developments.....	39
Key Conclusions	45
Appendix 1 NWAWP Meetings	46

Acronyms

AWP	Aggregate Working Party
BAA	British Aggregates Association
BGS	British Geological Survey
BMAPA	British Marine Aggregate Producers Association
CDEW	Construction, Demolition and Excavation Waste
DLUHC	Department of Levelling Up Homes and Communities (now renamed MHCLG)
LAA	Local Aggregate Assessment
MHCLG	Ministry of Housing, Communities and Local Government
MPA	Mineral Planning Authority
mpa	Mineral Products Association
NPPF	National Planning Policy Framework
NWAWP	North West Aggregate Working Party
SOCG	Statement of Common Ground
WDI	Waste Data Interrogator
UDP	Unitary Development Plan

Glossary

Active/Inactive -	Sites are described as active where material was produced at any time during 2023 and as inactive when the site was not in production during that period. Inactive sites include those that have been worked in the past and those that have yet to begin. The term 'inactive' replaces the term 'dormant' used in surveys prior to AM97 as the term 'dormant' acquired a more specific meaning under the terms of the Planning & Compensation Act 1991 and the Environment Act 1995.
Aggregate	Granular or particulate material which is suitable for use (on its own or with the addition of cement, lime or bituminous binder) in construction as concrete, mortar, roadstone, asphalt or drainage courses, or for use as constructional fill or railway ballast (also referred to as 'construction aggregates').
Secondary aggregates	Aggregate which originates as a waste of other quarrying and mining operations, or from industrial processes (e.g. colliery waste or minestone, blast furnace slag, power station ash, china clay waste, slate waste), but excluding chalk and clay/shale worked primarily for aggregate purposes
Landbanks	The stock of mineral reserves with valid planning permissions for their extraction but where their extraction has yet to take place. 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. The landbank is usually calculated at a mineral planning authority level.
Local Aggregate Assessment (LAA)	An annual assessment of the demand for and supply of aggregates in a mineral planning authority's area.
LAA Annual Provision	The forecast future aggregate demand figure within a Mineral Planning Authority's LAA. This should be based on a rolling average of 10 year's sales data and other relevant local information (e.g. development growth aspirations in the MPA area).
Managed Aggregate Supply System (MASS)	This system works through national, sub-national and local partners working together to ensure a steady and adequate supply of aggregate mineral across the country

Marine Aggregates	Sand and gravel dredged offshore
National and Sub-National Guidelines	The national and regional guidelines for aggregates provision in England and Wales 2005 to 2020 provide an indication of the total amount of aggregate provision that the mineral planning authorities, collectively within each Aggregate Working Party, should aim to provide. The guidelines are no longer current and revised guidelines are due.
Permitted Reserve	The tonnage of mineral in a site (including stockpiles) for which full planning consent (planning permission with determined conditions attached) for extraction exists. Such sites may be operational or inactive. Inactive sites include those where extraction has been undertaken in the past and where permitted reserves still remain and those where planning permission has been granted but extraction has yet to begin. Dormant sites, as defined by the Planning & Compensation Act 1991 and the Environment Act 1995, cannot be worked until new schemes of conditions have been determined and therefore do not contain permitted reserves. See also landbank.
Primary aggregates	Aggregate produced from naturally-occurring mineral deposits and used for the first time.
Recycled Aggregates	These are the product of processing inert construction and demolition waste, asphalt planings and used railway ballasts into an aggregate that can be reutilised for construction projects.

Introduction

Executive Summary

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

This Annual Monitoring Report(AMR) provides sales and reserve data for the calendar year 1st January – 31st December 2023.

The Annual Monitoring Report (AMR) provides information on aggregates in the region of North West of England so that the NWAWP can contribute to the monitoring of the Managed Aggregate Supply System (MASS) and assess whether the North West of England is making a full contribution towards meeting both national and local aggregate needs.

NWAWP sales and reserves data for 2023 was collected as part of the British Geological Survey (BGS) four-year national Aggregate Minerals Survey (AM2023) undertaken in 2024. Not all data returns for this report were received in the same format, and so there may be minor differences in data or the rounding of figures when compared with the national 2024 AM2023 Report (to be published later in 2025). There are also instances where there appears to be discrepancies between the data in the AM2023 and the data published in this report, these were investigated and are due to the AM2023 methodology to prevent double counting of aggregate sales between regions.

The NWAWP AMR 2023 provides data for each of the following sub-regions in the North West:

- Cheshire East,
- Cheshire West and Chester
- Cumbria (Cumberland, Westmorland and Furness, and Lake District National Park Authority)
- Greater Manchester, Merseyside and Halton and Warrington
- Lancashire

This report includes:

- Maps showing the geographical area covered by the NWAWP; the location of quarries, wharves and rail depots and; the location of offshore aggregate production licence areas
- Sales and reserves of primary aggregates in 2023, collected from the National Aggregates Minerals Survey 2024 (2023 data). (AM2023)
- The landbank in the NWAWP area at 31st December 2023
- Secondary and Recycled Aggregates figures in the NWAWP
- Information on minerals plans and policies in the NWAWP area
- Information on aggregates sites and planning applications
- Information on the latest Local Aggregate Assessments prepared by the mineral planning authorities

The key findings of this Annual Monitoring Report including 2023 data is as follows:

Land-won Sand and Gravel

- Total Land-won Sand and Gravel Sales of 1.41mt (1.8mt in 2022).
- Total Land-won Sand and Gravel Reserves of 13.30mt (14.86mt in 2022)
- Landbank of 5.71 years (6.22 years in 2022)
- Overall, there has been a continued decline in sand and gravel reserves since 2015, where they were at a figure of 28.63mt.

Crushed Rock

- Total Crushed Rock Sales of 6.16mt (6.48mt in 2022)
- Total Crushed Rock Reserves of 234.17mt (228.91mt in 2022).
- Landbank of 33.31 years (33.13 years in 2022).
- There has been an increase in reserves due to an increase in responses from operators. However, the general trend has been a continuing decline in crushed rock reserves since 2015, when the figure was of 308.54mt.

Landings of Marine Dredged Sand and Gravel

- Total Marine-dredged Sand and Gravel sales 0.058mt (0.2mt in 2022).
- Total Imported marine-dredged sand and gravel removal 0.058mt.
- Total marine dredged landings in the North West¹ 0.286mt.

Overall Primary Aggregates figures

- Total primary aggregates sales 7.63mt (8.48mt in 2022).
- Total primary aggregates reserves 247.47mt (243.77mt in 2022).

A summary of key figures for 2023 are provided in Table 1 below.

As of 31 December 2023, the reserves of sand and gravel in the North West are below the minimum 7 year landbank (at a figure of 5.71 years) and for crushed rock above the minimum 10 year landbank (at a figure of 33.31 years), required by national planning policy. This is based upon a North West combined LAA annual provision rate, in the absence of national and sub-national guidelines.

There is a concern however that replenishment rates are falling, due to a lack of planning applications for primary aggregate extraction coming forward in the North West region

As reported in the AM2019, the North West is heavily dependent upon imports, and aggregate consumption outstrips production.

¹ Liverpool Wharves only [Crown Estates Summary of Statistics 2024](#)

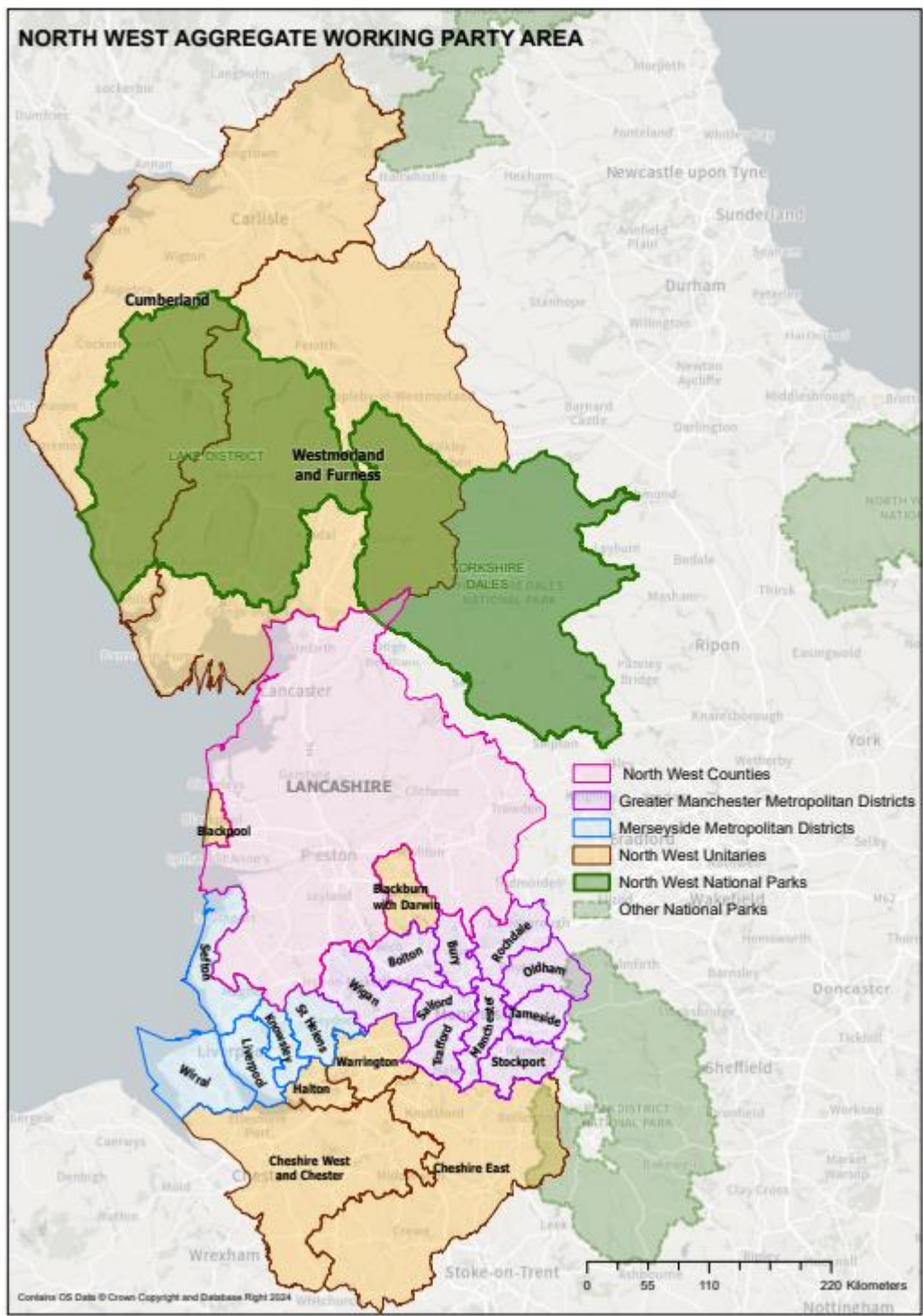
North West Aggregate Working Party – AMR 2024

Table 1 **Dashboard key data summary**

Aggregate	Sales in 2023 (million tonnes)	Change in sales from previous year	10 year sales average (million tonnes)	3 year sales average (million tonnes)	Sales Trend	LAA annual provision (million tonnes)	Permitted reserves at 31 December 2023 (million tonnes)	Change in permitted reserves from previous year	Landbank of permitted reserves (years)	Change in Landbank from previous years
Sand and Gravel	1.41	↓	2.34	1.74	↓	2.172	13.30	↓	5.71	↓
Crushed Rock	6.16	↓	7.03	6.66	↓	9.4	234.16	↑	33.31	↑
Marine sand and gravel	0.058	↓	0.23	0.19	↓	N/A	N/A		N/A	N/A
Total Primary Aggregates	7.63	↓	9.6	8.59	↓	N/A	247.46	↑	N/A	N/A
Recycled and Secondary Aggregates	1.05	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A

Mineral Planning Authorities in NWAWP Area

Figure 1 NWAWP Area Mineral Planning Authorities 2023



Primary Aggregates

Location of quarries², wharves and rail depots

Figure 2 Location of quarries, wharves and rail depots in 2023



² Dingle Bank Quarry, Chelford ceased extraction at the end of 2020 and is in its restoration phase.

Primary Aggregates

Sales and Imports

The sales data shown in Table 2 below has been obtained from the previous NWAWP AMRs, the AM2019 and returns received from operators during the National Aggregate Minerals Survey 2024 (relating to 2023 data). It should be noted however that operator returns were still poor in 2023, and, Mineral Planning Authorities (MPAs) had to make sales estimates. Operators are not required to provide sales and reserves data to the MPAs.

The total Land-won Sand and Gravel Sales in 2023 were 1.41mt. This is a decrease from 2022 sales figures of 1.8mt and are well below the 2019 figure of 2.55mt. Sand and gravel sales in 2023 were still below both the 10-year average and the 3 year average sales figures. All Mineral Planning Authorities reported lower figures in sand and gravel sales in 2023 compared to 2019, indicating the industry has been impacted by the wider economic downturn. The aggregate industry has been particularly affected by factors causing slow economic growth on the construction industry.

Sales of marine sand and gravel has seen a decrease in reported sales in the NWAWP area, this is despite the Crown Estate³ reporting that 0.286mt were landed at the Liverpool Wharves in 2023.

The total crushed rock sales in 2023 were 6.16mt. This is a decrease from 2022 sales figures which were 6.48mt. Crushed rock sales in 2023 were below the 10-year average, and the 3 year average. Crushed rock sales in Cumbria and Lancashire continued to decrease in 2023 whilst in Greater Manchester, Merseyside and Halton and Warrington sales increased again in 2023.

Imported aggregate data from outside of England and Wales was collected through the National Aggregate Minerals Survey (AM2023), which was undertaken by the British Geological Survey (BGS) in 2024 on behalf of the Ministry of Housing Communities and Local Government (MHCLG). However, at the time of preparation of this AMR the analysis of the 2023 data was not yet available and will therefore be discussed in the AMR 2025 (2024 data). The most comprehensive available data on imports was collected via the previous national survey AM2019⁴, which was also undertaken by the BGS.

Table 5g of the AM2019 demonstrates that overall there were 0.5mt of sand and gravel imported into the North West, with the largest amount being imported from North Wales (at a figure of 0.43mt). In the case of crushed rock, 6.21mt was imported into the North West, with the largest proportion being from the East Midlands at a figure of 3.34mt. In the case of aggregate being imported from outside of England and Wales, into the region 0.48mt of igneous rock was imported in 2019.

³ [Summary of Statistics 2023 Crown Estate](#)

⁴ Aggregate Minerals Survey 2019 - <https://www.gov.uk/government/publications/aggregate-minerals-survey-for-england-and-wales-2019>

Table 2 Primary Aggregate Sales and Imports in NWAWP Area⁵

	2014	2015	2016	2017	2018	2019	2020	2021	2022	2023	10 year average	3 year average
Sand and Gravel												
Cheshire East	0.75	0.51	0.46	0.29	0.55	0.24	0.19*	0.187	0.155	0.093	0.34	0.145
Cheshire West and Chester	0.42	0.6	0.71	0.67	0.8	0.8	0.6	0.72	0.65	0.54	0.65	0.64
Cumbria	0.68	0.71	0.81	0.79	0.71	0.77	0.75*	0.850	0.8	0.72	0.76	0.79
Greater Manchester, Merseyside & Halton & Warrington	0.26	0.31	0.26	0.26	0.34	0.34*	0.34*	0.13*	0.17	0.0281	0.24	0.11
Lancashire	0.48	0.56	0.50	0.51	0.5	0.4	0.25*	0.13	0.029	0.029	0.34	0.06
Total Sand and Gravel sales	2.59	2.69	2.74	2.52	2.85	2.55	2.13	2.02	1.8	1.41	2.34	1.74
Crushed Rock												
Cheshire East	0.001	0.002	0.001	0.001	0.001	-	0.001	0.001	0	0	0.00	0.00
Cheshire West and Chester	-	-	-	-	-	-	-	-	-	-	-	-
Cumbria	2.58	3.3	2.89	2.61	2.82	3.01	2.59	2.86	2.66	2.51	2.78	2.68
Greater Manchester, Merseyside & Halton & Warrington	0.69	0.79	1.52	1.31	0.97	1.17	0.74	0.51*	0.451*	0.8	0.9	0.59
Lancashire	2.80	3.50	3.81	3.20	3.59	3.15	3.28	3.97	3.366	2.85	3.35	3.39
Total Crushed Rock sales	6.07	7.59	8.22	7.12	7.38	7.33	6.61	7.34	6.48	6.16	7.03	6.66
Marine Sand and Gravel												
Cumbria	0.02	0.006	0.01	0.008	-	-	-	-		-	0.01	0.00

⁵ Figures in this report are based on those within each Mineral Planning Authorities LAA, and therefore may differ from the figures reported in previous NWAWP AMRs.

North West Aggregate Working Party – AMR 2024

	2014	2015	2016	2017	2018	2019	2020	2021	2022	2023	10 year average	3 year average
Greater Manchester, Merseyside & Halton & Warrington	0.1	0.11 ⁶	0.26	0.28	0.34	0.34	0.34	0.31	0.2	0.058	0.23	0.19
Total Marine Sand and Gravel Sales	0.12	0.116	0.27	0.288	0.34	0.34	0.34	0.31	0.2	0.058	0.24	0.19
Total Aggregate Sales	8.78	10.39	11.23	9.93	10.62	10.22	9.081	9.67	8.48	7.63	9.6	8.59
Imports (from outside of England and Wales)							0.48	0.42	0.44			
Total Imports							0.48	0.42	0.44			

⁶ Figure has been adjusted in this Report to remove imported crushed rock.

*Based on estimates

Permitted Reserves

The permitted reserves of sand and gravel and crushed rock in the NAWAP area at 31 December 2023 are set out in Table 3 below.

The permitted reserves of sand and gravel in the North West of England at 31 December 2023 were 13.30mt. This is a decrease in permitted reserves from 2022 from a figure of 14.86mt. The largest proportions of permitted reserves of sand and gravel are from quarries in Cheshire West and Chester (22%) and Cumbria (30%) and Lancashire (35%).

The permitted reserves of crushed rock in the North West of England at 31 December 2023 were 234.17mt. This is an increase in permitted reserves from 2022 at a figure of 228.91mt. The explanation for this increase is the operators in Greater Manchester, Merseyside and Halton and Warrington, have been able to provide information relating to their permitted reserves rather than new permissions being granted. However despite this increase in permitted reserves the overall trend is still a decreasing reserve, 2015 was the last substantial increase in permitted crushed rock reserves. Cumbria, Greater Manchester and Lancashire have all had a decrease in crushed rock permitted reserves since 2015.

In the case of Cheshire East, the Mineral Planning Authority acknowledges there is a permitted sandstone reserve of 4.85mt, with quarries supplying small quantities of building/ornamental stone rather than crushed rock aggregate. The quarries most likely to supply crushed rock aggregate have been inactive for several years. Those active in 2019 and 2020 produced building/ornamental stone, this is therefore not reflected in Table 3 as although it is permitted it will not be used for crushed rock aggregate. The operators of crushed rock quarries in Cheshire East do not respond to the NAWAP Annual Survey so estimates have been used for several years and in 2019 and 2020 it was felt that it was no longer appropriate to continue to rely on this as a basis for crushed rock aggregate supply. Cheshire East now forecasts need on the basis of 100% imported crushed rock aggregate as evidenced in the Cheshire sub-region figures in the National AM2019.

Table 3 shows there has been a gradual decline in the total permitted reserves since 2015. This demonstrates that sales of aggregates have been at a greater rate than the granting of planning permissions for new reserves.

Table 3 Permitted Reserves in NAWP Area⁷

Aggregate	2014	2015	2016	2017	2018	2019	2020	2021	2022	2023
Sand & Gravel										
Cheshire East	0.65	0.4	0.24	3.7	2.52	2.52	2.6	2.63	1.9	1.76
Cheshire West and Chester	4.7	8	6.8	6.60	5.79	6.06	6	5.32 ⁸	3.61	2.94
Cumbria (inc. Lake District)	9.2	8.77	7.77	7.38	7.26	6.63	6.03	5.63	4.72	4
Greater Manchester, Merseyside & Halton & Warrington	3.86	3.7	1.2	1.2	1.68	1.68	1.68	-	-	0
Lancashire (inc. Blackburn and Blackpool)	8.24	7.76	6.97	6.42	5.9	5.04	4.8	4.43	4.6	4.6
Total Sand & Gravel Permitted Reserves	26.65	28.63	22.98	25.30	23.15	21.93	21.11	18.01	14.86	13.30
Crushed Rock										
Cheshire East	4.29	4.9	4.9	4.9	4.89	0.6	0	0	0	0
Cheshire West and Chester	0	0	0	0	0	0	0	0	0	0
Cumbria (Inc. Lake District)	137.06	144.63	130	127.35	120.89	115.51	116.35	114.28	111.09	108.56
Greater Manchester, Merseyside &	21.18	20.43	19.59	18.37	17.5	12.42	12.05	C	C	10.6

⁷ Figures in this report are based on those within each Mineral Planning Authorities LAA, and therefore may differ from the figures reported in previous NAWP AMRs.

⁸ Following further analysis of the 2021 figures Cheshire West and Chester MPA requested that the 2021 figure be adjusted from 6 (as reported in the previous AMR) to 5.32. This changed the Total Sand and Gravel Reserves for the AWP area from 18.69 (as previously reported) to 18.01.

North West Aggregate Working Party – AMR 2024

Halton & Warrington										
Lancashire	120.07	138.58	135.93	131.62	128.06	153.98	119.49	113.59	117.818	115
Total Crushed Rock Permitted Reserves	282.6	308.54	290.42	282.24	271.34	282.51	247.89	227.87*	228.91*	234.16*
Total Permitted Reserves	309.25	337.17	313.4	307.544	294.49	304.44	269.00	246.56*	243.77*	247.46*

C = Confidential

* = Does not include confidential figures or ornamental stone

Landbank in NWAWP Area

Aggregate landbanks are principally a monitoring tool to provide Minerals Planning Authorities with early warning of possible disruption to the provision of an adequate and steady supply of land-won aggregates in their particular area. They should be used principally as a trigger for a Mineral Planning Authority to review the current provision of aggregates in its area and consider whether to conduct a review of allocation of sites in its local minerals plan. This is of particular importance in the case of aggregates because of the scale and long term nature of the industry, as well as the length of time it may take from identifying a site to the commencement of extraction.

As stated under paragraph 219 f) of the NPPF December 2023, Mineral Planning Authorities should plan for a steady and adequate supply of aggregates by maintaining landbanks of at least 7 years for sand and gravel and at least 10 years for crushed rock.

The landbanks for permitted reserves for both sand and gravel and crushed rock in the North West of England at 31st December 2023 are shown in Table 4 below. In the absence of up-to-date national and sub-national guidelines, the landbanks have either been calculated by using the LAA annual apportionment rate or the sales figures, this is set out in the latest LAA for each Mineral Planning Authority. For the purposes of the NWAWP Annual Monitoring Reports, landbanks are calculated using the 10-year sales average. The landbank figures may therefore differ from individual Mineral Planning Authorities (MPAs) which may use the 3-year sales average or another method. Hence the landbanks stated in this report may differ from those in the individual LAAs.

The overall sand and gravel landbank for the North West of England is 5.71 years and is therefore below the minimum 7 year landbank required. Therefore additional planning permissions for the extraction of sand and gravel are required urgently to ensure the North West of England maintains a steady and adequate supply of sand and gravel.

As demonstrated in Table 4, aside from Lancashire, all authorities have a sand and gravel landbank below the minimum 7-year requirement. However, it is worthy of note that much of Lancashire's landbank is contained in a site which is currently non-operational.

The overall crushed rock landbank for the North West of England is 33.31 years (and is therefore significantly above the minimum 10 year requirement). As shown by Table 4, the North West of England is significantly reliant particularly upon Cumbria and Lancashire to maintain an adequate and steady supply of crushed rock. Greater Manchester, Merseyside and Halton and Warrington have a landbank that is slightly above the minimum 10-year requirement. Cheshire West and Chester does not have any crushed rock reserves. In the case of Cheshire East, there is a 4.85mt landbank of sandstone from permitted sites, however this is not likely to contribute to the supply of crushed rock aggregates as it is used for ornamental and/or building stone. Consequently, this AMR has recorded the crushed rock reserve in Cheshire East as nil.

There has been a clear decline in replenishment rates over the past 10 years, due to a lack of planning applications for primary aggregate extraction coming forward in the North West region and some outdated mineral plans. In the past 10 years there has been a fall in sand and gravel reserves by 50% and a fall in crushed rock reserves by 17%.

Table 4 Landbank in NAWP Area – at 31st December 2023⁹

Mineral Planning Authority	Annual rate of future demand based on the latest annual Local Aggregate Assessment	LAA Rate is 10 years sales average	Annual Rate of future demand based on 10 years sales average	Reserves (as of 31 st December 2023)	Landbank in year (as at 31 st December 2023)
Sand & Gravel					
Cheshire East	0.423	No	0.34	1.76	5.18
Cheshire West and Chester	0.65	Yes	0.65	2.94	4.5
Cumbria	0.8	No	0.76	4	5.26
Greater Manchester, Merseyside and Halton and Warrington	0.27	No	0.24	0	0.00
Lancashire	0.029	No	0.34	4.6	13.53
Total Sand & Gravel	2.172	N/A	2.33	13.30	5.71 years
Crushed Rock					
Cheshire East	0	N/A	0	0	0
Cheshire West and Chester	N/A	N/A	N/A	N/A	N/A
Cumbria	2.77	No	2.78	108.57	39.05
Greater Manchester, Merseyside and Halton and Warrington	0.8	No	0.9	10.6	11.78
Lancashire	3.42	No	3.35	115	34.33
Total Crushed Rock	6.99	N/A	7.03	234.17	33.31 years

⁹ Rounding may result in different figures from those presented in individual LAAs.

Secondary and Recycled Aggregates

Recycled aggregate is defined as an aggregate resulting from the processing of inorganic materials previously used in construction, such as crushed concrete / brick / stone and planings or scrapings from metalled roads. Secondary aggregate is defined as aggregate obtained as a by-product of other quarrying and mining operations or as a by-product from industrial processes such as power station ash, glass (cullet) or railway ballast.

It is important to understand the data limitations associated with secondary and recycled aggregates. Most notably regarding the waste data interrogator (WDI), the data within the WDI is collected from the returns from permitted facilities and records only waste received, and waste exported from site. It is not intended as a tool for calculating secondary and recycled aggregates.

Secondary aggregates, where certain quality protocol specifications are met, is considered to be non-waste and is therefore not included within the waste tonnage returns. The data within the WDI does not account for mobile crushers or recycling and re-use that occurs on individual construction sites. The tonnage of recycled aggregates reported in the WDI is likely to only represent a proportion of the recycled aggregates in circulation. The figures in Table 5a below are only estimates and should be treated with caution.

Information on the sales of secondary and recycled aggregates was also collected through the NAWWP surveys sent to operators of fixed construction and demolition recycling sites and secondary aggregate producers in the North West of England. The details of the survey are outlined in Table 5b below.

Table 5a CD&E Waste Arisings (Environment Agency, 2023¹⁰)

Mineral Planning Authority	Amount Produced (tonnes)	Amount Managed (tonnes)
Cheshire East	186,626.6	276,694.4
Cheshire West and Chester	95,064.77	40,923.08
Cumbria	525,877.6	541,897.9
Greater Manchester, Merseyside and Halton and Warrington	1,108,129	1,409,920
Lancashire	698,140.7	778,496.5
Total	2,613,838.67	3,047,931.88

¹⁰ [2023 Waste Data Interrogator - data.gov.uk](https://data.gov.uk)

Survey Data

Table 5b Results of NWAWP 2023 survey on sales of recycled and secondary aggregate

Mineral Planning Authority (MPA)	Total sales of secondary/recycled aggregate (tonnes)
Cheshire East	Estimated 93,824 tonnes
Cheshire West and Chester	0.78mt (according to WDI 2022 waste removed) 0.12mt (according to a limited number of survey responses)
Cumbria	27,364 tonnes (from limited number of responses)
Greater Manchester, Merseyside and Halton and Warrington	150,195 (from limited number of responses)
Lancashire	No information received
Totals	1,051,383 tonnes

Development Plans and Mineral Policies in NWAWP Area

Local Planning Authorities are required to prepare Local Plans which include policies to aid the determination of planning applications and to set out the development of a county/borough/district over a 15-year period. This includes policies for minerals development, which mineral planning authorities must prepare. Some authorities will include mineral planning policies within their overall Local Plans, whilst others will prepare specific Minerals and Waste Local Plans. There is concern in the industry that several of the Mineral Plans are in need of updating. Table 6 below details the status and progress of Local Plans in the NWAWP area.

Table 6 Minerals Plans Information

Mineral Planning Authority / Authorities	Plan Name/Mineral DPD	Preparation stage / Current Status	Status in previous annual monitoring report
Cheshire East	Local Plan Strategy (Strategic Policies) Part One and Site Allocations & Development Policies Document Part Two Draft Minerals and Waste Plan	Local Plan Strategy adopted July 2017 New Local Plan being prepared. Local Plan Issues Paper 2024	Site Allocations and Development Management Policies adopted December 2022 Site Allocations and Development Policies Document (cheshireeast.gov.uk) Draft Minerals & Waste Plan published for consultation Nov-Dec 2022 (Regulation 18)
Cheshire West and Chester	Local Plan (Part One) Strategic Policies and Local Plan (Part Two) Land allocations and Detailed Policies	Local Plan (Part one) adopted January 2015 and Local Plan (Part Two) adopted July 2019.	Both parts of the Local Plans were adopted by the time of the publication of the NWAWP AMR 2023. Both Local Plans contain mineral policies.
Cumbria	Cumbria Minerals and Waste Plan 2015-2030	Adopted September 2017 Preparation for separate Cumberland and Westmorland and Furness Local Plans underway.	Adopted prior to the publication of the NWAWP AMR 2023.
Lake District	Local Plan 2020 to 2035	Adopted May 2021	Adopted prior to publication of the NWAWP AMR 2023.
Greater Manchester	Greater Manchester Joint Minerals Development Plan	Adopted March 2013	Adopted prior to the publication of the NWAWP AMR 2023.

North West Aggregate Working Party – AMR 2024

Liverpool	Liverpool Local Plan 2013-2033	Adopted January 2022	Adopted prior to the publication of the NAWWP AMR 2023.
Halton	Delivery and Allocations Local Plan	Adopted March 2022 DALP Adopted.pdf (halton.gov.uk)	Adopted prior to the publication of the NAWWP AMR 2023.
Knowsley	Local Plan Core Strategy	Adopted 2016	Adopted 2016 – no report on a review taking place
Sefton	A Local Plan for Sefton	Adopted April 2017	Adopted 2017 – no report on a review taking place
St. Helens	St Helen's Local Plan 2020-2035	Adopted July 2022 St Helens Borough Local Plan adopted 12 July 2022 Microsoft Word - Local Plan Written Statement - FINAL adoption version 16.06.2022 (sthelens.gov.uk)	Adopted prior to the publication of the NAWWP AMR 2023.
Wirral	Wirral Local Plan 2020-2035	Submitted for examination on 26 October 2022 – examination is ongoing.	Local Plan in Examination Local Plan Examination wirral.gov.uk Reg 18 consultation took place January-April 2020
Warrington	Warrington Local Plan 2021-2038	Local Plan adopted 4 December 2023	Submitted for examination 22 April 2022 Local Plan in Examination Local plan examination warrington.gov.uk
Lancashire	Lancashire Minerals and Waste Local Plan	Lancashire Minerals and Waste Local Plan Core Strategy adopted February 2009. Site Allocations and Development Management Policies document adopted 2013. Regulation 19 consultation expected to take place 2025 Intending submission to the Secretary of State for examination in 2025/2026.	Lancashire Minerals and Waste Local Plan Core Strategy adopted February 2009. Site Allocations and Development Management Policies document adopted 2013. Regulation 18 consultation took place September – November 2018

Aggregates sites and planning applications in NWAWP Area

Table 7 below lists the quarries and wharves producing primary aggregate within the North-West of England. Figure 2 shows the geographical location of each of the quarries listed below.

Altogether there are 94 primary aggregate quarries in the North West of England recorded in 2023, (with 64 operational) and 3 wharves. Two wharves are located along the River Mersey and one is located at Seaforth Docks.

Table 7 **Aggregates sites in NWAWP area**

Mineral Planning Authority	Site Name	Type of site (Wharf, rail depot, quarry etc)	Operator	Grid Reference	Mineral	Status
Cheshire East	Arclid Quarry	Quarry	Bathgate Silica Sand Ltd.	SJ 783 613	Silica Sand	O – End date 2041
	Bent Farm Quarry	Quarry	Sibelco UK	SJ 831 619	Silica Sand	O – End date 2031
	Dingle Bank Quarry	Quarry	Sibelco UK	SJ 832 714	Silica Sand	NO – end date 2020 ceased being restored
	Eaton Hall Quarry	Quarry	Tarmac Limited	SJ 860 655	Silica Sand	O – end date 2042
	Endon Quarry	Quarry	Park Skip Hire	SJ 940 763	Sandstone	O – end date 2042
	Gawsworth Quarry	Quarry	O'Gara Developments	SJ 919 679	Sandstone	NO – end date 2042
	Lee Hills Quarry	Quarry	Lee Hills Quarry	SJ 928 691	Sandstone	NO – end date 2042
	Marksend Quarry	Quarry	Earls Stone Ltd	SJ 941 757	Sandstone	O – end date 2042
	Mere Farm Quarry	Quarry	Hanson Quarry Product Europe Limited	SJ 825 746	Sand	R – extraction ceased 2014
	Ralph Henshaw	Quarry	Earls Stone Ltd	SJ 766 939	Sandstone	O – end date 2042
	Rough Hey Quarry	Quarry	O'Gara Developments	SJ 923 682	Sandstone	NO – end date 2042
	Rudheath Lodge ¹¹	Quarry	Sibelco UK	SJ 751 698	Silica Sand	O – end date 2032

¹¹ Rudheath Lodge is split between the administrative boundaries of Cheshire East & Cheshire West with planning approvals in both MPAs. Extraction has been approved between 202-2032 with a further 2 years allowed for restoration.

North West Aggregate Working Party – AMR 2024

Mineral Planning Authority	Site Name	Type of site (Wharf, rail depot, quarry etc)	Operator	Grid Reference	Mineral	Status
	Sycamore Quarry	Quarry	Earls Stone Ltd	SJ 939 766	Sandstone	O – end date 2042
Cheshire West and Chester	Cherry Orchard Sand Unit	Quarry	Cherry Orchard Sand Unit	SJ 568 680	Sand	R
	Cheshire Sands (Crown Farm Quarry including Delamere Quarry)	Quarry	Tarmac Limited	SJ 572 699	Sand	O – end date 2042
	Cobden Farm	Quarry	Tarmac Limited	SJ 587 673	Sand	C – end date 2021 – being restored
	Forest Hill Quarry	Quarry	CEMEX UK Material Limited	SJ 612 714	Sand	O – end date 2027
	Fourways	Quarry	Tarmac Limited	SJ 577 690	Sand	R
	Town Farm Quarry	Quarry	P Casey Enviro Ltd.	SJ 565 735	Sand	R
	Rudheath Lodge ¹²	Quarry	Sibelco UK	SJ 751 698	Silica Sand	O – end date 2032
Cumbria - Cumberland	Brockleworth Farm	Quarry	Norbrook Laboratories	NY 348 551	Sand	R
	Cardewmires Quarry	Quarry	Thomas Armstrong Ltd	NY 343 505	Sand and gravel	O - end date 2025
	Derwent Howe Slag Bank	Quarry	Thomas Armstrong Ltd	NX 985 285	Slag	NO – end date 2016
	Elterwater Quarry (slate)	Quarry	Burlington Slate Ltd	NY 324 048	Secondary aggregate	O – end date 2042
	Eskett and Rowrah Quarries	Quarry	Tendley Quarries Ltd.	NY 054 167	Limestone	O – end date 2034
	Faugh No. 1 Sand Pit	Quarry	Hanson Quarry Products Europe Limited	NY 512 552	Sand	NO – end date 2024
	Faugh No. 2 Sand Pit	Quarry	Eddie Wannop Limited	NY 512 552	Sand	O end date 2032
	Ghyll Scaur Quarry	Quarry	Aggregate Industries UK	SD 171 828	Igneous Rock (HSA)	O – end date 2045
	High House Quarry (Highfield)	Quarry	D A Harrison	NY 511 252	Sand and gravel	O – end date 2036

¹² Rudheath Lodge is split between the administrative boundaries of Cheshire East & Cheshire West with planning approvals in both MPAs.

North West Aggregate Working Party – AMR 2024

Mineral Planning Authority	Site Name	Type of site (Wharf, rail depot, quarry etc)	Operator	Grid Reference	Mineral	Status
	Kendal Fell Quarry	Quarry	Mr Pennington	SD 502 925	Limestone	O – end date 2042
	Kirkhouse Quarry	Quarry	Lakeland Minerals Limited	NY 564 601	Sand and gravel	O – end date 2033
	Low Gelt Quarry	Quarry	Hanson Quarry Products Europe Limited	NY 512 552	Sand	O – end date 2026
	Moota Quarry	Quarry	CEMEX RMC (UK) Ltd	NY 148 361	Limestone	O – end date 2024
	Overby No. 2 Sand Pit	Quarry	Thomas Armstrong Limited	NY 125 470	Sand	O – end date 2026
	Peel Place Quarry	Quarry	Tendley Quarries	SD 069 011	Sand and Gravel	O – end date 2025
	Silvertop Quarry	Quarry	W & M Thompson (Quarries) Ltd	NY 586 602	Limestone	O – end date 2042
	Snowhill Quarry No. 1	Quarry	Mr M Smallwood	SD 280 387	Limestone	NO – end date 2022
	Snowhill Quarry No. 2	Quarry	Mr M Smallwood	SD 280 387	Sandstone with waste sold as secondary aggregate	NO - end date 2020
	Tendley Quarry	Quarry	Tendley Quarries	NY 088 288	Limestone	O – end date 2029
	Kirkby Slate	Quarry	Burlington Aggregates		Slate	O- 2050
Cumbria – Westmorland and Furness	Bonnie Mount	Quarry	J. E. A and S. M Burne	NY 548 313	Sand	O – end date 2035
	Low Plains	Quarry	Tarmac Limited	NY 490 410	Sand and gravel	O – end date 2033
	Roosecote Sand Pit	Quarry	Burlington Aggregates Ltd	SD 224 687	Sand and gravel	O – end date 2029
	Holme Park Quarry	Quarry	Aggregate Industries UK	SD 536 788	Limestone	O – end date 2043
	Hartley Quarry	Quarry	CEMEX RMC (UK) Ltd	NY 787 083	Limestone	NO – end date 2042
	Flusco Quarry	Quarry	Lakeland Minerals Limited	NY 464 293	Limestone	NO – end date 2032
	Sandside Quarry	Quarry	Tarmac Limited	SD 482 807	Limestone	O – end date 2029
	Stainton Quarry	Quarry	Tarmac	SD 247 729	Limestone	O – end date 2042
	Goldmire Quarry	Quarry	Burlington Aggregates	SD 219 739	Limestone	O – end date 2042

North West Aggregate Working Party – AMR 2024

Mineral Planning Authority	Site Name	Type of site (Wharf, rail depot, quarry etc)	Operator	Grid Reference	Mineral	Status
	Shapfell Limestone Quarry	Quarry	Tata Steel UK Limited	NY 587 138	Limestone	NO – time extension to 2036 for restoration only
	Holmescales Quarry	Quarry	Aggregate Industries UK	SD 556 869	Sandstone (HSA)	O – end date 2042
	Roan Edge Quarry	Quarry	CEMEX RMC (UK) Ltd	SD 584 926	Sandstone (HSA)	O – end date 2038
	Helbeck Quarry	Quarry	Breedon Group	NY 799 158	Limestone	NO – end date 2042
Cumbria - Lake District	Shap Beck Quarry	Quarry	Hanson Quarry Products Europe Limited	NY 550 181	Limestone	O – end date 2042
	Shap Blue Quarry and Works	Quarry	CEMEX (UK) Ltd	NY 564 106	Igneous rock	O – end date 2038
	Shap Pink	Quarry	Armstrong Aggregates		Igneous rock	O-end date 2042
	Elterwater	Quarry	Burlington Aggregates		Slate	O- end date 2042
	Honister	Quarry	Honister Slate		Slate	O
Greater Manchester - Salford City	Astley Moss	Quarry	Breedon Aggregates	SJ 371 500	Sand and Gravel	NO – end date 31 st Dec 2022
Greater Manchester – Tameside Metropolitan Borough Council	Buckton Vale Quarry	Quarry	W Maher & Sons	SJ 530 885	Sandstone	O – end date 2042
	Harrop Edge Quarry	Quarry	Chartrange (Quarry Products)	SJ 982 959	Sandstone	NO – end date 2042
Greater Manchester - Bury Metropolitan Borough Council	Fletcher Bank Quarry	Quarry	W Maher & Sons	SD 804 170	Sandstone	O – end date 2036
	Fletcher Bank Quarry	Quarry	PP O'Connor Ltd	SD 804 170	Sandstone	O – end date 2036
Greater Manchester - Bolton Council	Harwood Quarry	Quarry	Booth Ventures	SD 747 124	Sandstone	O – end date 2026
	Montcliffe Quarry	Quarry	Armstrongs Aggregates Ltd	SD 656 124	Sandstone	O – end date 2033

North West Aggregate Working Party – AMR 2024

Mineral Planning Authority	Site Name	Type of site (Wharf, rail depot, quarry etc)	Operator	Grid Reference	Mineral	Status
	Pilkington Quarry	Quarry	Armstrongs Aggregates Ltd	SD 622 121	Sandstone	NO – end date 2026
Greater Manchester – Stockport Metropolitan Borough	Offerton Quarry	Quarry	Offerton Sand and Gravel	SJ 928 893	Sand and Gravel	NO
Greater Manchester – Wigan Metropolitan Borough	Morley's Hall Quarry	Quarry	Casey	SJ 685 990	Sand and gravel	NO – end date 2024
Merseyside - St. Helens	Bold Heath Quarry	Quarry	D Morgan Plc	SJ 530 885	Sandstone	O – end date 2025
Merseyside – Liverpool City Council	Garston Wharf	Wharf	Hanson Quarry Products Europe Limited and Tarmac	SJ 397 837	Sand	O – dredging license until 2024
Merseyside – Wirral Metropolitan Borough Council	Mersey Wharf	Wharf			Sand and gravel	NO – dredging license until 2029
Merseyside – Sefton Metropolitan Borough Council	Port of Liverpool (Seaforth Docks)	Docks	Aggregate Industries	SJ 323 961	Crushed rock (imports from Glensanda Quarry)	O
Warrington Borough Council	Southworth Quarry	Quarry	Gaskell Bros (WM&C) Ltd	SJ 619 940	Sandstone	O – end date 2025
Lancashire County Council	Ribblesdale Cement - Bellman	Quarry	Hanson	SD 761 428	Limestone	O – end date 2027
	Back Lane	Quarry	Aggregate Industries	SD 510 695	Limestone	O – end date 2048
	Leapers Wood	Quarry	Tarmac	SD 515 694	Limestone	O – end date 2048
	Ribblesdale – Bankfield	Quarry	Tarmac	SD 755 435	Limestone	O – end date 2033 subject to s106
	Ribblesdale – Lanehead	Quarry	Hanson	SD 752 437	Limestone	O – end date 2027
	Dunald Mill	Quarry	Tarmac	SD 511 679	Limestone	NO – end date 2022

North West Aggregate Working Party – AMR 2024

Mineral Planning Authority	Site Name	Type of site (Wharf, rail depot, quarry etc)	Operator	Grid Reference	Mineral	Status
	Clayton Hall	Quarry	Neales		Sand	C – end date 2028
	German Lane	Quarry	P Casey Enviro	SD 562 171	Sand	NO – end date 2042
	Lydiat Lane	Quarry	JA Jackson	SD 554 239	Sand	C – end date 2030
	St Annes Foreshore	Quarry	William Rainford	SD 313 300	Sand	C
	Bradleys	Quarry	JA Jackson	SD 512 340	Sand	O – end date 2029
	Runshaw	Quarry	Tarmac	SD 543 195	Sand	NO – end date 2027
	Sandons Farm	Quarry	Chorley Sand	SD 592 131	Sand	C– end date 2022
	Lower Brockholes	Quarry	Hargreaves	SD 578 304	Sand	C
	Sharples	Quarry	Hargreaves	SD 472 428	Sand	C– end date 2028
	Catlow	Quarry	Greens		Sandstone	O – end date 2028
	Leeming	Quarry	Brown Bros	SD 683 406	Sandstone	O – end date 2042
	Ellel Crag	Quarry	JA Jackson		Sandstone	O – end date 2038
	Whinney Hill	Quarry	Forterra	SD 756 30	Sandstone	O – end date 2042
	Whittle Hill	Quarry	Ruttles		Sandstone	NO – end date 2042
	Brinscall	Quarry	Armstrongs	SD 633 421	Sandstone	O – end date 2042
	Waddington Fell	Quarry	Armstrongs	SD 718 479	Sandstone	O – end date 2022
	Fletcher Bank	Quarry	Marshalls		Sandstone	O – end date 2042
	Scout Moor	Quarry	Marshalls	SD 814 190	Sandstone	O – end date 2029
	Jamestone	Quarry	W Maher and Sons	SD 758 233	Sandstone	O – end date 2042
	Whitworth	Quarry	Fairhurst Stone	SD 875 202	Sandstone	O
	Rakehead	Quarry	Ibstock		Sandstone	NO – end date 2042
	Deerplay	Quarry	Waste Recycling Group		Sandstone	NO – end date 2035

North West Aggregate Working Party – AMR 2024

Mineral Planning Authority	Site Name	Type of site (Wharf, rail depot, quarry etc)	Operator	Grid Reference	Mineral	Status
	Tong Farm	Quarry	Fox Brothers	SD 880 225	Shale / sandstone	O – end date 2031
	Ravenhead Quarry		Booths		Sandstone	O – end date 2042
Notes: C = confidential figure <i>Status: O=operational; NO=Non Operational, D=Dormant, C=Closed, R=Restored/Redeveloped</i>						

Planning Applications

Table 8 below lists the submitted planning applications for aggregate production within the North West of England, that were either decided or pending a decision late 2022 through 2023 and early 2024. Applications that were submitted as far back as 2019 have also continued to be included where a decision is still pending. For completeness, the outcome of the decision for an application has also been included if this available, even although it is beyond the 31st December 2023 base date of this AMR.

Table 8 *Planning Applications and Decisions in NWAWP Area*

Mineral Planning Authority	Site Name and Location (Grid Reference)	Operator / Applicant	Tonnage (mt) (for aggregate use)	Type of Application	Date Submitted	Decision
Cheshire East	Bent Farm Quarry	Sibelco UK Ltd		18/5890W Application to vary conditions for continued extraction of industrial sands together with progressive restoration. Variation to planning conditions 3, 5, 6, 31, 32 and 37 of permission 8/08/0375/C. This extends mineral extraction until the end of 2023, as well as the period for material processing and restoration of the main quarry to the end of 2024, and restoration of the processing plant to the end of 2026.	25 November 2018	A decision on this application is pending.

Mineral Planning Authority	Site Name and Location (Grid Reference)	Operator / Applicant	Tonnage (mt) (for aggregate use)	Type of Application	Date Submitted	Decision
		Sibelco UK Ltd	0.41	Application to vary conditions comprising three main elements, to extend the timeframe for mineral extraction, to allow for the extension of extraction limits (within the permitted red line boundary) and to extract to a deeper depth within a section of the quarry	26 March 2021	Approved at Planning Committee 02.02.2022 subject to conditions and deed of variation of the S106 agreement (the agreement remains unsigned) The application was withdrawn by the operator on 31.01.2024.
	Somerford Farm	Sibelco UK Ltd		Full 23/1928W	22.05.2023	Pending
Cheshire West and Chester	Forest Hill (21/01861/S73) - Western Extension	Cemex Ltd	18000	Variation of Conditions – including time extension	Wed 28 Apr 2021	Approved Wed 31 Aug 2022
	Crown Farm (11/04200/MIN)	Tarmac Limited	5283000	S73 21/04693/S73	Tue 23 Nov 2021	Withdrawn Mon 09 May 2022
	Crown Farm	Tarmac Limited	5.58 mt sand and gravel	Full	Fri 20 Jan 2023 23/00320/FUL	Pending
	Rudheath Lodge (17/03104/MIN) and (18/04735/FUL)	Sibelco Ltd	300,000 (for the whole site - CWaC and Cheshire East)	S73 22/02867/S73 Proposed partial removal of furnace bottom ash (FBA)	Thu 28 Jul 2022	Approved Wed 08 Feb 2023
	Land Off Cookes Lane Rudheath Northwich	Cheshire Land Ltd		S73 23/02550/S73	Mon 14 Aug 2023	Pending

North West Aggregate Working Party – AMR 2024

Mineral Planning Authority	Site Name and Location (Grid Reference)	Operator / Applicant	Tonnage (mt) (for aggregate use)	Type of Application	Date Submitted	Decision
	23/00110/S73	Forest Hill Quarry Chester Road Cuddington Northwich CW8 2DL		Variation of condition 5 (cessation of use) of planning permission 11/05618/MIN to allow retention of sand bagging plant and three storage bays	Fri 13 Jan 2023	Granted Wed 22 Mar 2023
Cumbria	Cardewmir es	Thomas Armstrong	0.1	Full	17/11/2022	Granted - 28/02/2023
	Leipsic Quarry 3/22/9006	Alston Natural Stone		S73 time extension to 2037 for building stone extraction	19.12.22	Granted 14.03.2023
	Land adjacent Cardewmir es Quarry 1/22/9006	Thomas Armstrong Aggregates	105,000 sand and gravel.	Full Lateral extension for sand and gravel	17.11.22	Granted 28.02.23
	Esk Quarry (Faugh 2) 1/22/9005	Eddie Wannop Ltd		Full time extension for continued sand and gravel extraction, and for recycled aggregate production	19.10.22	Granted 4.10.23
Lancashire	Bradleys Sand Pit	J A Jackson		Extension of time LCC/2021/0059	03/11/2021	Granted 27/04/22
	Lower Hall Farm, Salmesbury	Harleyford Aggregates	3Mt sand and gravel	Full	26/02/21	Pending
	St Annes Foreshore	Fylde Borough Council	150,000 tpa sand	Full application for resumption of sand winning activity	30/03/2022	Withdrawn
	Land north of A674, Chorley	Ruttles	116,000 sand and gravel	Full	15/01/2021	Pending

North West Aggregate Working Party – AMR 2024

Mineral Planning Authority	Site Name and Location (Grid Reference)	Operator / Applicant	Tonnage (mt) (for aggregate use)	Type of Application	Date Submitted	Decision
	Waddington Fell Quarry	Armstrongs	Variation of Condition 1 of Planning Permission LCC/2022/0057 to allow mineral working to continue until 1 July 2026 and final restoration to be completed by 1 July 2027	s73	22/09/23	Granted 06/03/24
	Dunald Mill Quarry, Carnforth	Tarmac	Time extension for mineral extraction	s73	11/10/2021	Undetermined
	Land off Bourbles Lane, Presall	Baxter Group Ltd	The extraction of 500,000 tonnes and processing of sand and gravel including the construction of new site access roads,	Full	31/07/2023	Pending
Greater Manchester						
Notes: C = confidential figure						

Local Aggregate Assessments

Mineral Planning Authorities are required to prepare a Local Aggregate Assessments (LAAs) every year as a contribution towards the Managed Aggregate Supply System (MASS). The purpose of LAAs is to assess the demand and supply of aggregates within the Mineral Planning Authority area.

Within the North-West, Greater Manchester, Merseyside and Halton and Warrington prepare a joint LAA.

Following local government reorganisation in April 2023, Cumbria County Council was replaced by two new unitary authorities – Cumberland Council and Westmorland and Furness Council. The LAA 2023 for the sub-region of Cumbria is therefore now produced jointly between Cumberland Council and Westmorland and Furness Council as well as the Lake District National Park Authority.

Mineral Planning Authorities can decide to either base their LAA figure (the demand figure used to calculate the landbank of both sand and gravel and crushed rock) on a rolling average of 10 years sales data, 3 year average sales data, or an uplift to the 10 years or 3 years sales data which takes into account ‘other relevant local information.’

Table 9 below sets out the date of each MPAs latest LAA, the LAA figures included in those LAAs for both sand and gravel and crushed rock, and the calculation method.

Table 9 Local Aggregate Assessments in NWAWP Region

Mineral Planning Authority	LAA Date	LAA Figure		Calculation Method
		Sand and Gravel (mt)	Crushed Rock (mt)	
Cheshire East	2023	0.423	2.41	The Council has considered other local information to produce an annual average for future aggregate demand for the next 20-year period (2024-2043). The LAA figure identified has resulted from applying an annual 2% growth rate to the 2023 baseline average, 10-year sales figure (2014–2023) for the next 20-year period ending 31 December 2043. For crushed rock, the LAA figure is a 20-year forecast for crushed rock aggregate demand (million tonnes) using the preferred approach (of taking average import and consumption rates for the Cheshire Sub-region (2014 and 2019) and applying an annual 2% growth rate thereafter) using 2023 as the baseline position.
Cheshire West and Chester	2024	0.65	N/A	Annual apportionment figure used which originates from the adopted Cheshire West and Chester Local Plan (Part One) Strategic Policies.
Cumbria (Cumberland Council,	2023	0.8	2.77 – all crushed rock	Sand and gravel provision based on 3yr average sales figure.

Westmorland and Furness Council , and the Lake District National Park Authority)			Limestone – 1.98 Sandstone & igneous (exc. VHSA) – 0.34 High spec roadstone (HSA & VHSA) – 0.46	Crushed rock based on 10yr average sales.
Greater Manchester, Merseyside and Halton and Warrington	Draft 2022 LAA (including 2019, 2020, 2021 and 2022 data).	0.27	0.80	Sand and Gravel and Crushed Rock LAA figure is based on 3 year average sales plus 2% uplift to take into account sub-regional growth.
Lancashire	2023	0.029	Limestone = 2.38 Gritstone = 1.04	Sand and Gravel Production capacity is significantly reduced. Runshaw, which represents most of the permitted reserves, has yet to start working. LAA rate is based on 10 year average sales figure; Limestone LAA figure is based upon the 3 year average sales figure; Gritstone LAA figure is based upon 10 year average sales figure

Local and National Aggregate Need

The annual rates of provision for aggregates in the North West of England, as outlined within each of the Mineral Planning Authorities LAAs, are 2.172mt for sand and gravel per annum and 9.4mt for crushed rock per annum.

The combined LAA annual provision rate for the North West is below the 2023 10 years sales average (2.34) for sand and gravel but exceeds the crushed rock rate (7.03). In the case of sand and gravel, the combined LAA annual provision rate is below the 10 year sales average by 0.168mt. In the case of crushed rock, the combined LAA annual provision rate exceeds the 10 year sales average by 2.37mt.

The current national and sub-national guidelines for aggregates provision are now out of date and are currently under review by . As the national and sub-national guidelines are out of date, the NWAWP do not consider them to be a robust baseline to assess whether the North West and its Mineral Planning Authorities are making an appropriate contribution to local and national aggregate need. The combined LAA annual provision rate is the most robust baseline available and has therefore been used instead. The lack of guidelines is also potentially impacting the MPAs in relation to updating their mineral planning policies.

Trends and Analysis

Primary aggregates sales

Sales of sand and gravel decreased in 2023 in comparison to 2022, sales of crushed rock also decreased.

Although the overall sales of sand and gravel had been steady since 2012, the effects of the economic downturn, continue to be felt in the sales of 2023. However, this may improve for the 2024 data but as the economy was demonstrating few signs of recovery this could be marginal. The 3-year average for sand and gravel is well below the 10-year average, demonstrating that there has been a definite impact on the minerals industry from the continued economic situation in sales in recent years.

In the case of crushed rock, sales have been steady since 2015. The 3-year average sales are still below the 10-year average for crushed rock sales, demonstrating that the impact of the slowed economy on the crushed rock aspect of the mineral and extraction industry is still a little unstable but easing. Cumbria and Lancashire both experienced a decrease in crushed rock sales compared to 2022. Although Greater Manchester, Merseyside and Halton and Warrington experienced an increase in sales reported.

Marine won sand and gravel sales, which had increased over the 10-year period to 2021, saw a further decrease in 2023. However, the landings figures from Crown Estate do demonstrate a higher figure than sales reported.

Caution must be applied though to the last 3-year combined figures for marine won and land won sand and gravel in the Greater Manchester, Merseyside and Halton and Warrington sub-region within this report, as these are not accurate figures due to the need to maintain confidentiality.

Primary aggregate reserves

In the North West of England reserves of sand and gravel decreased from 14.86mt in 2022 to 13.30mt in 2023. Over the 10 years there has been a decreasing trend in sand and gravel reserves, apart from in 2017 where reserves increased from the previous year by approximately 2.0mt.

Within the Greater Manchester, Merseyside and Halton and Warrington Astley Moss has ceased operation and is now in the restoration phase. Offerton sand and gravel quarry still contains a small reserve, but this site was inactive in 2019 and 2020. The NAWAP are exploring the possibility of marine landings replacing historic land-won sand and gravel sales. There are however applications pending for sand and gravel extraction (Table 8) that could provide additional reserves for the region if approved.

Permitted reserves of crushed rock in the North West increased from 228.91mt in 2022 to 234.17mt 2023. Over the last 10 years there has generally been a decreasing trend in crushed rock reserves, apart from 2015 when reserves increased by approximately 26.0mt and a minor increase in 2022. The increase in 2023 is as a result of information being

provided by operators to the Greater Manchester, Merseyside and Halton and Warrington sub region on previously unreported existing reserves rather than a new quarry being established. The increase in crushed rock reserves in 2015 was due to an increase in reserves in both Cumbria and Lancashire. The North West region is reliant on crushed rock reserves from Cumbria, Lancashire and the Greater Manchester, Merseyside and Halton and Warrington sub region, as there are no crushed rock reserves in Cheshire West and Chester. The crushed rock reserve in Cheshire East is recorded as nil as the landbank of sandstone in the MPA area is not likely to contribute to the supply of crushed rock aggregate.

Secondary and recycled aggregates

The most up to date information of secondary and recycled aggregate is from the Waste Data Interrogator 2023. A survey of fixed construction and demolition recycling facilities and secondary aggregates producers was undertaken in the North West, however, the response rate was low, and therefore the figures in Table 5b should be treated with caution.

The data from the WDI showed 2.61mt of secondary and recycled aggregate were produced in the North West and 3.05mt was managed.

It is important to understand the data limitations associated with secondary and recycled aggregates. Most notably regarding the waste data interrogator (WDI) the data within the WDI is collected from the returns from permitted facilities and records only waste received, and waste exported from site.

Secondary aggregates, where certain quality protocol specifications are met, are considered to be non-waste and therefore are not included within the waste tonnage returns. The data within the WDI does not account for mobile crushers or recycling and re-use that occurs on individual construction sites. The tonnage of recycled aggregates reported in the WDI is likely to only represent a proportion of the recycled aggregates in circulation.

Major Construction Projects or Developments

Major construction projects have a significant effect on the aggregate supply within a region. The North West contains two major cities (Manchester and Liverpool), each of which have large development growth aspirations. HS2 Phase 2a (West Midlands - Crewe) and Phase 2b (Crewe – Manchester) was proposed to run through the NAWP area. Phase 2b has however now been scrapped. Its construction was expected to have a major impact on aggregate demand. This was particularly the case in the Cheshire sub-region where a borrow pit was proposed for phase 2a within Cheshire East. In the case of HS2 Phase 2b¹³ 4 borrow pits were proposed to facilitate the construction; 3 in Cheshire West and Chester and 1 in Cheshire East.

¹³ HS2 Phase 2b – Environmental Statement consultation document – Volume 3: Appendix CT-008-00000 Borrow Pit Report

Following the announcement in October 2023 that HS2 will not extend beyond Birmingham there was a subsequent announcement for the Network North proposals; these could result in additional or accelerated road building programs coming forward. These proposals will create additional demand for aggregates within the North West.

Table 10 below outlines the major construction projects or developments that are proposed within the North West of England.

Table 10 Major Construction Projects or Developments

Project/Development Name and Location	Time Scale (estimated start and end date)	Comments
Greater Manchester - Port Salford	2020-2037	Port Salford will be developed as an integrated tri-modal facility, with on-site canal berths, rail spur and container terminal as essential elements of the scheme. The overall facility will provide around 500,000 sqm of employment floorspace by
Greater Manchester - Salford Quays	2020-2037	land to accommodate around 192,000 sqm of office floorspace, around 12,500 new dwellings and minimal industry and warehousing (around 6,000 sqm) has been identified within the Quays.
Greater Manchester - North-East Growth Corridor	2020-2037	land to accommodate almost 1 million sqm of new employment floorspace and around 19,000 new dwellings
Greater Manchester - Wigan-Bolton Growth Corridor	2020-2037	New highway infrastructure will connect Junction 26 of the M6 and Junction 5 of the M61 including public transport provision. land to accommodate just over 1million sqm of new employment floorspace and approximately 13,000 new dwellings has been identified within the area.
Greater Manchester - Manchester Airport Enterprise Zone	2020-2037	New HS2 station; Completing the development of Airport City immediately around the airport, which will provide a total of around 500,000 sqm of office, logistics, hotel and advanced manufacturing space; Continuing to develop Medipark and Roundthorn Industrial Estate as a health and biotech cluster; Delivering approximately 60,000 sqm of office floorspace around

Project/Development Name and Location	Time Scale (estimated start and end date)	Comments
		the new HS2 station; Providing a minimum of 1,700 new homes to the west of the M56 at Timperley Wedge, up to 2037
Greater Manchester – New Carrington	2020-2037	4,300 dwellings; 350,00sqm of employment floorspace
Warrington – Warrington Western Link		New highway infrastructure to provide a western by-pass of the town centre across the Manchester Ship Canal, linking the A56 to the south of town centre to the A57 to the north.
Warrington – Warrington Waterfront	2021-2038	New urban quarter of 1,335 dwellings (1,070 of which will be delivered within the plan period) and associated infrastructure/services/community facilities.
Warrington – South East Warrington Urban Extension	2021-2038	A sustainable urban extension of around 4,200 dwellings (2,400 of which will be delivered within the plan period) and associated infrastructure/services/community facilities.
Warrington – Fiddlers Ferry	2021-2038	A sustainable mixed use development comprising 101 hectares of employment land and 1,760 dwellings (1,310 of which will be delivered within the plan period) and associated infrastructure/services/community facilities.
Warrington – Peel Hall	2021-2038	A new sustainable community of 1,200 dwellings and associated infrastructure/services/community facilities.
Warrington – South East Warrington Employment Area	2021-2038	A major new employment area of 137 hectares of employment land at the junction of the M6 and M56.
A500 Dualling	2025 - 2030	A500 between Meremoor Moss roundabout and M6 junction 16 to dual carriageway standard.
Middlewich Eastern Bypass	2024 – 2027	2.8 km long, two-way single carriageway road.

Project/Development Name and Location	Time Scale (estimated start and end date)	Comments
North West Crewe Package	2022 – 2024	2.6 km road scheme.
Royal Arcade, Crewe – Phase 1	2021 – 2023	Town Centre Regeneration - mixed-use development that will include a new bus station, multi-storey car park, cinema, restaurants, public realm, leisure and retail uses.
Leighton Hospital Rebuild, Crewe,	2025-2029	Leighton Hospital is being rebuilt due to reinforces autoclaved aerated concrete (RAAC) being identified as an issue.
Hynet North West Hydrogen Pipeline	unconfirmed	Hynet is a Nationally Significant Infrastructure Project (NSIP) Development Consent Order which has been rescheduled for submission in 2025 to ensure the project remains aligned with the Governments ambitions and overall strategy for hydrogen to 2050.
Liverpool Waters (including Isle of Man Ferry Terminal and New Everton Stadium)	2012-2042	Ongoing construction of several proposals coming forward as part of the Liverpool Waters outline permission including Ferry Terminal (due for completion 2022) and football stadium (starting 2021). Various additional proposals coming forward in phased approach.
Wirral Waters	2012-2034	Ongoing construction of several proposals coming forward as part of the Wirral Waters outline permission with numerous consents currently going through discharge of conditions.
St Helens – Parkside Colliery Regeneration.	Appeal Decision 11/11/21	Construction of up to 92,900 m2 of employment floorspace (Use Class B8 with ancillary B1(a)) and associated servicing and infrastructure including car parking; vehicle and pedestrian circulation space; alteration of existing access road including works to existing A49 junction; noise mitigation; earthworks to create development platforms and bunds; landscaping including buffers; works to existing spoil heap; creation of drainage features; substations and

Project/Development Name and Location	Time Scale (estimated start and end date)	Comments
		ecological works. Discharge of conditions ongoing.
Parkside Link Road and Business Park	Appeal Decision 11/11/21	Formation of a new link road between A49 (Winwick Road) and M6 Junction 22 including the re-alignment of Parkside Road and other associated works. Discharge of conditions ongoing and construction underway.
Knowsley – Halsnead Garden Village – Sustainable Urban Extension		Granted Garden Village status in 2017 with the scope for up to 1600 homes, substantial employment uses and an integrated country park. Being developed by various housebuilders with numerous applications ongoing, most now at discharge of conditions stage.
Knowsley – Land East of Halewood – Sustainable Urban Extension		Up to 1,100 dwellings with public open space including flood storage and mitigation measures. Being developed by various housebuilders with numerous applications ongoing, most now at discharge of conditions stage.
Sefton – Land East of Maghull	Appeal Decision 22 February 2021 and planning permission 21 October 2021	Hybrid application including new distributor road, flood relief, drainage and landscaping works to Whinny Brook and ancillary infrastructure and 1685 residential dwellings (C3), an older persons housing scheme with access also reserved (C2, C3), a mixed-use Local Centre (Uses A1-A5, C3, D1, D2);
Halton –East Runcorn Strategic Daresbury site and Sandymoor		Strategic Daresbury Site includes 26ha for expansion of B1 science, hi tech research and development, 40ha for office and knowledge-based facilities, up to 1400 dwellings and mixed use local centre. Sandymoor – completion of Sandymoor residential area with 1400 additional units, new local centre and primary school.

Project/Development Name and Location	Time Scale (estimated start and end date)	Comments
		Both include various phases with applications at different stages.
Cumbria – Carlisle Southern Link Road	Construction commenced June 2023; expected to complete 2025.	To enable the strategic growth to the south of Carlisle.
Cumbria – A66 dualling	Expected to commence 2024/2025	DCO approved March 2024. Appeal lodged against High Court's decision to dismiss legal challenge. Funding decision expected Spring/Summer 2025.
Cumbria – St Cuthbert's Garden Village	Expected to commence within the next 5 years – delivery of full scheme beyond 2030	<p>Significant urban extension to the south of Carlisle, proposed to accommodate 10,000 new homes along with new schools and community facilities.</p> <p>Planning permission still required for the initial stages.</p> <p>Construction of the first sites is expected to commence within the next 5 years, delivery of the full scheme would extend beyond 2030.</p>
Cumbria - A595 Grizebeck improvement scheme	2024-2026 - construction commenced September 2024.	<p>1.4km single carriageway replacement section with associated bridge and junction works. Planning permission granted October 2022.</p> <p>Funding awarded and construction commenced.</p> <p>.</p>
Lancashire - Cuerden strategic site	ongoing	<p>The delivery of new employment floor space</p> <p>The provision of up to 116 additional homes</p> <p>Significant investment in infrastructure, including highways and, pedestrian/cycle routes</p>
Lancashire - Preston Western Distributor	ongoing - 2023	The Preston Western Distributor road scheme allows people to travel more easily around parts of the Preston and Fylde area.
Lancashire - Fylde/Heyhouses M55 Link	ongoing - 2024	The M55 to Heyhouses Link Road will create a much better

Project/Development Name and Location	Time Scale (estimated start and end date)	Comments
		connection between Lytham St Annes and the M55 motorway, relieving congestion on smaller local roads and supporting the commercial viability of local housing and business development sites.
Lancashire – Highways England A585 Improvement	Ongoing – completion in 2024	Bypass of Little Singleton

Key Conclusions

At 31 December 2023, the reserves of sand and gravel in the North West were below the minimum 7 year landbank (at a figure of 5.71 years) and in the case of crushed rock above the minimum 10 year landbank (at a figure of 33.31 years), the increase in this case being due to the figures reported by Greater Manchester, Merseyside and Halton and Warrington. These figures are based on a combined LAA annual provision rate, in the absence of national and sub-national guidelines. However, these figures should be treated with caution due the notable drop in extraction levels that occurred as a result of the impacts of the continuing economic situation.

There is a concern however that there is a fall in replenishment rates, due to not enough planning applications for primary aggregate extraction being granted in the North West region.

As reported in the AM2019, the North West is heavily dependent upon imports, and aggregate consumption outstrips production.

Particularly in the case of sand and gravel, it is recognised that there will be supply issues in the near future if planning applications for sand and gravel extraction do not come forward or are not approved. The NWAWP is considering the role that marine dredged sand and gravel could play in meeting sand and gravel demand. Although the landbank for crushed rock is significantly higher than the minimum 10 year landbank, it is recognised that there is still a need to ensure that there are appropriate levels of crushed rock permitted reserves in order to meet both local and national needs.

Appendix 1 NWAWP Meetings

Table 11 *NWAWP Region AWP Meetings*

Meeting Date	Link to minutes of the meeting	Summary of Key Points
6 June 2023		<p>The following matters were discussed:</p> <ul style="list-style-type: none"> - Progress of the NWAWP AMR 2022 (2021 data) - DLUHC Update – including status of the Reform Planning Bill. - Local Aggregate Assessments - Updates from Planning Authorities - HS2 - Industry Update
22 November 2023		<p>The following matters were discussed:</p> <ul style="list-style-type: none"> - A presentation was given by Mersey Forest with support from DEFRA on Nature Recovery on Vacant and Derelict Land - Update given on the ratification of the NWAWP AMR 2022 (2021 data) and the draft of the NWAWP 2023 (2022 data) - Local Aggregate Assessments - Updates from Planning Authorities - Industry Updates - DLUHC update including information on the National Aggregate Monitoring Survey (2023 data)