NORTH WEST REGIONAL AGGREGATES WORKING PARTY

Cheshire • Cumbria • Greater Manchester
Halton • Lancashire • Merseyside • Warrington

ANNUAL MONITORING REPORT 2009

[Incorporating 2008 statistics]

CHESHIRE WEST AND CHESTER COUNCIL

Richard Evans
Chairman NWRAWP
Minerals and Waste Planning Policy Team
Cumbria County Council

Anne Mosquera
Secretary NWRAWP
Minerals and Waste Policy Unit
Cheshire West and Chester Council

For further information please contact**:**

Natalie Durney-Knight
NWRAWP Technician
Minerals and Waste Policy Unit
Cheshire West and Chester Council
Backford Hall
CHESTER
CH1 6PZ

Tel: 01244 973117
E-mail: Natalie.Durney-Knight@cheshirewestandchester.gov.uk

December 2009

EXECUTIVE SUMMARY – ANNUAL MONITORING REPORT 2009

i. The North West Regional Aggregates Working Party (NWRAWP) is one of nine similar working parties throughout England and Wales established in the 1970's, the core functions of which are set out in the Terms of Reference detailed in Appendix A.

ii. The Annual Monitoring Report 2009 represents the seventeenth annual report and uses data collected for sales and reserves during the period 1st January to 31st December 2008. Information regarding planning applications, progress of development plans, construction activity and the use of recycled and secondary aggregate is also included for the same period.

iii. Total primary aggregate sales fell during 2008 by approximately 14% from 13.08mt in 2007 to 11.17mt. Sales of both crushed rock and land-won sand and gravel fell during the same period by 15% and 14% respectively. Sales of marine dredged aggregate fell significantly by 33% from 0.66mt in 2007 to 0.44mt.

iv. Total permitted primary aggregate reserves fell by approximately 1.6% from 384.8mt in 2007 to 378.63mt. Reserves of crushed rock fell by 3.8% during the monitoring period from 346.07mt in 2007 to 332.66mt, whilst reserves of sand and gravel increased by 18.6% from 38.74mt in 2007 to 45.97mt.

v. Landbanks remained relatively stable during the 2008 monitoring period. The landbanks at 31st December 2008 were 31.98 years for crushed rock and 13.4 years for sand and gravel.

vi. Some significant planning applications for the removal of primary aggregate were determined during the 2008 monitoring period. A total of 18.9mt in crushed rock reserves and 11.54mt in sand and gravel reserves was released. Applications for the release of 6.66mt of crushed rock and 5.16mt of sand and gravel remained in hand as at 31st December 2008.

vii. Total arisings of alternative materials fell 19% from 0.52mt in 2007 to 0.43mt. Total arisings of Pulverised Fuel Ash (PFA) and Furnace Bottom Ash fell by 55% and 49% respectively, whilst arisings of slate waste increased by 28%.

viii. Despite the downturn in the economy during 2008 some major construction projects continued across the North West region. Significant investment in Chester continued including the Delamere Street Development, whilst several major road projects were completed in Cumbria. East Lancashire saw substantial housing clearance and refurbishment activity supported by private sector investment. In Greater Manchester the New Islington Millennium Community housing development continued to progress throughout 2008 and the Gateway to the Future project for Stockport Town Centre and M60 Gateway also commenced during the monitoring period.

CONTENTS

CHAPTER		PAGE
	Executive Summary	2
1.	**Introduction**	7
2.	**Membership Changes**	9
3.	**Meetings**	9
4.	**Results of the annual monitoring of primary aggregate sales 2009**	9
	Total aggregate sales	13
	Crushed rock sales	13
	Sand and gravel sales	14
	Total aggregate reserves	14
	Crushed rock reserves	14
	Sand and gravel reserves	15
	Landbanks	15
	Commentary on trends	15
5.	**Monitoring of primary aggregate landbanks**	22
6.	**Marine sand and gravel landings from off the North West coast**	25
	Active dredging off the North West coast (including Penrhyn, North Wales)	25
	Landings from off the North West coast (excluding Penrhyn, North Wales)	27
	Barrow	27
	Eastham	29
	Heysham	29
	Liverpool	29
	Summary	
7.	**Monitoring of planning applications**	30
8.	**Sub-regional profiles**	31
	Cheshire	31
	Cumbria	36
	Lancashire	42
	Greater Manchester, Merseyside, Halton and Warrington	49
9.	**Secondary and recycled aggregate**	54
	Alternative arisings	54
	Recycled aggregate	55
10.	**Monitoring of development plans**	60
11.	**Environment Act 1995: Review of aggregate mineral planning permissions**	60

FIGURES AND TABLES **PAGE**

Figure 1: North West RAWP Mineral Planning Authorities 8

Figure 2: Trends in primary aggregate sales in the North West 1995-2008 13

Figure 3: Primary aggregate sales in the North West 2008 17

Figure 4: Active crushed rock sites in the North West 2008 18

Figure 5: Active sand and gravel sites in the North West 2008 19

Figure 6: Inactive crushed rock sites in the North West 2008 20

Figure 7: Inactive sand and gravel sites in the North West 2008 21

Figure 8: Crushed rock sales against annualised apportionment in the North West 1995 -2008 24

Figure 9: Sand and gravel sales against annualised apportionment in the North West 1995 -2008 24

Figure 10: Marine dredged aggregate landings from off the North West coast 27

Figure 11: **:** Applications pending, licensed dredging grounds and landing points in North West coastal waters 29

Figure 12: Cheshire primary aggregate sales against annualised apportionment 31

Figure 13: Spatial distribution of minerals working in Cheshire 2008 35

Figure 14: Cumbria primary aggregate sales against annualised apportionment 36

Figure 15: Spatial distribution of minerals working in Cumbria 2008 41

Figure 16: Lancashire primary aggregate sales against annualised apportionment 42

Figure 17: Spatial distribution of minerals working in Lancashire 2008 48

Figure 18: Greater Manchester, Merseyside, Halton and Warrington primary aggregate sales against annualised apportionment 49

Figure 19: Spatial distribution of minerals working in Greater Manchester, Merseyside, Halton and Warrington 2008 53

Figure 20: Fixed Construction Demolition and Excavation Waste (CDEW) sites in the North West 2008 56

Table 1: Monitoring of total primary aggregate sales – North West 1994-2008 10

Table 2: Monitoring of crushed rock sales – North West 1994-2008 10

Table 3: Monitoring of sand and gravel sales – North West 1994-2008 11

Table 4: Monitoring of total primary aggregate reserves – North West 1994-2008 11

Table 5: Monitoring of crushed rock reserves – North West 1994-2008 12

FIGURES AND TABLES CONTINUED **PAGE**

Table 6: Monitoring of sand and gravel reserves – North West 1994-2008 12

Table 7: Monitoring of landbanks – North West 2008 22

Table 8: Marine dredged aggregate removed from off the North West coast 26

Table 9: Marine dredged aggregate landed from off the North West coast 26

Table 10: Marine dredged aggregate licence holders 28

Table 11: Monitoring of mineral planning applications determined 1st January – 31st December 2008 30

Table 12: Monitoring of mineral planning applications pending as at 31st December 2008 30

Table 13: Monitoring of total primary aggregate sales – Cheshire sub-region 1994-2008 32

Table 14: Monitoring of total primary aggregate reserves – Cheshire sub-region 1994-2008 32

Table 15: Cheshire sites included in AM2008 aggregate monitoring survey 34

Table 16: Monitoring of total primary aggregate sales – Cumbria sub-region 1994-2008 37

Table 17: Monitoring of total primary aggregate reserves – Cumbria sub-region 1994-2008 37

Table 18: Cumbria sites included in AM2008 aggregate monitoring survey 39

Table 19: Monitoring of total primary aggregate sales – Lancashire sub-region 1994-2008 43

Table 20: Monitoring of total primary aggregate reserves – Lancashire sub-region 1994-2008 43

Table 21: Lancashire sites included in AM2008 aggregate monitoring survey 46

Table 22: Monitoring of total primary aggregate sales – Greater Manchester, Merseyside, Halton and Warrington sub-region 1994-2008 50

Table 23: Monitoring of total primary aggregate reserves – Greater Manchester, Merseyside, Halton and Warrington sub-region 1994-2008 50

Table 24: Greater Manchester, Merseyside, Halton and Warrington sites included in AM2008 aggregate monitoring survey 52

Table 25: Alternative arisings in the North West 2007-2008 54

Table 26: Fixed Construction, Demolition and Excavation Waste (CDEW) in the North West 2008 57

Table 27: Environment Act 1995: Summary of aggregate mineral review sites 61

APPENDICES **PAGE**

Appendix A: NWRAWP Terms of Reference 62

Appendix B: Monitoring of aggregate mineral primary planning applications 63

Table A: Monitoring of primary aggregate mineral primary planning applications decisions made 1st January – 31st December 2008 63

Table B: Monitoring of primary aggregate mineral primary planning applications in hand as at 31st December 2008 64

Appendix C: Development plans in the North West region 65

Appendix D: Historical monitoring statistics 1989-2008 69

Table A: Monitoring of crushed rock sales – North West 1989-2008 69

Table B: Monitoring of sand and gravel sales – North West 1989-2008 70

Table C: Monitoring of crushed rock reserves – North West 1989-2008 71

Table D: Monitoring of sand and gravel reserves – North West 1989-2008 72

Appendix E: Minutes of meeting held on 2nd December 2008 73

Appendix F: National and regional guidelines for aggregate provision 2001-2016 76

Appendix G: National and regional guidelines for aggregate provision 2005-2020 78

Appendix H: Membership of the North West RAWP 79

1 INTRODUCTION

1.1 The North West Regional Aggregates Working Party (NWRAWP) is one of nine similar working parties throughout England and Wales established in the 1970's, the core functions of which are set out in the Terms of Reference detailed in Appendix A. The NWRAWP is comprised of the counties of Cumbria (including the Lake District National Park) and Lancashire; the Metropolitan Boroughs of Greater Manchester and Merseyside along with the Unitary Authorities of Blackburn with Darwen, Blackpool, Halton and Warrington and the newly established Cheshire East and Cheshire West and Chester authorities[1] (Figure 1). Those parts of the Peak District National Park which fall within Cheshire East and Greater Manchester are represented by the East Midlands Regional Aggregates Working Party and those parts of the Yorkshire Dales National Park which fall within Cumbria are represented by the Yorkshire and Humberside Regional Aggregates Working Party. Please note that for the purposes of mapping the areas of Merseyside, Halton and Warrington are included within the Greater Manchester sub-region.

1.2 Membership is drawn from the constituent Mineral Planning Authorities (MPAs), central government departments and representatives from the aggregates industry. The metropolitan districts in Greater Manchester are represented by the Greater Manchester Geological Unit (GMGU), which provides mineral planning services to the ten Metropolitan Borough Councils (MBCs). The five Merseyside authorities are represented on mineral planning issues by the Environment Advisory Service (EAS) which regularly provides professional planning advice for Knowsley, Sefton, and St Helens MBCs on issues relating to the environment including minerals extraction and waste disposal. Lancashire County Council acts for the authorities of Blackburn with Darwen and Blackpool on minerals policy issues. Cumbria acts for the Lake District National Park Authority in respect of work undertaken by the NWRAWP. The authorities of Halton and Warrington represent themselves on mineral planning issues.

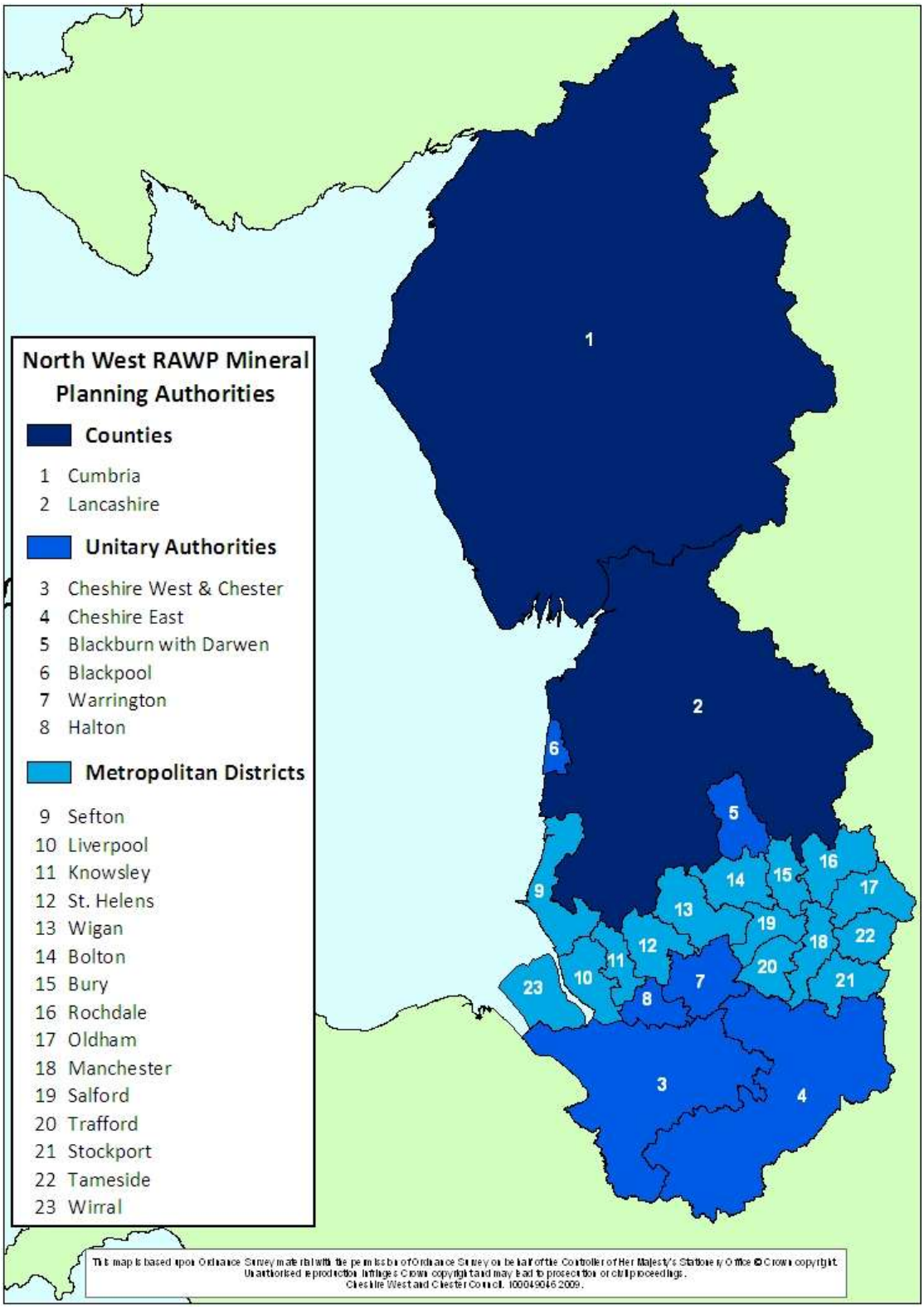
1.3 The terms of reference of the North West Regional Aggregate Working Party are set out in Appendix A.

1.4 The Annual Monitoring Report 2009 represents the seventeenth annual report and provides information relating to land and marine won primary aggregate sales and reserves throughout the North West Region for the preceding year (2008). Information relating to the progress of development plans, planning applications, construction industry activity, secondary and recycled aggregates and mineral review applications is also provided for the period 1st January 2008 to 31st December 2008.

1.5 This report includes maps to illustrate the spatial distribution of crushed rock and sand and gravel sites in the North West Region within Sections 4 and 8.

[1] Cheshire West and Chester and Cheshire East Unitary Authorities were formed on 1st April 2009 and replaced Cheshire County Council and the six district authorities of Chester City, Congleton, Crewe and Nantwich, Ellesmere Port and Neston, Macclesfield and Vale Royal

Figure 1: North West RAWP Mineral Planning Authorities



NB: Please note Cheshire West and Chester and Cheshire East Unitary Council were not formed until 1st April 2009

2 MEMBERSHIP CHANGES

2.1 The current membership of the NWRAWP is included as Appendix G. Since the 1st January 2009 the following membership changes have taken place:

2.2 Mr R Evans has replaced Mr H Collin as Chairman to the North West RAWP.

2.3 Mrs A Mosquera has replaced Mr A Farrow as Secretary to the North West RAWP.

2.4 Mr M Plummer has replaced Mr D A Wilkes as Department for Communities and Local Government representative for the North West RAWP.

2.5 Ms C Williams has replaced Mr K Patrick as representative of the Greater Manchester Geological Unit (GMGU) for the North West RAWP.

3 MEETINGS

3.1 The working party met on 2nd December 2008 to discuss the key findings from the Annual Monitoring Survey 2008 (incorporating 2007 statistics). Other matters discussed at the meeting included the implications of The Yorkshire and Humber Plan (Regional Spatial Strategy - RSS), the implications of Paragraph 70 of Mineral Policy Statement 1 (MPS1) Practice Guide regarding landbanks and Local Government Review (LGR) in Cheshire.

3.2 The minutes from this meeting are detailed in Appendix E.

4 RESULTS OF THE ANNUAL MONITORING OF PRIMARY AGGREGATE SALES AND RESERVES 2009 (INCORPORATING 2008 STATISTICS)

4.1 From January 2009 to August 2009 the NWRAWP, in conjunction with its constituent MPAs, carried out an annual survey of aggregate sales and reserves in the North West region for the 2008 monitoring period AM08 (1st January 2008 to 31st December 2008).

4.2 Tables 1-6 provide figures for the sales and reserves of primary aggregates in the North West region for the 2008 monitoring period. Figures for the previous thirteen years are also provided for comparison. Results from the Unitary Authorities of Halton and Warrington have been included with the figures for Greater Manchester and Merseyside, and those for Blackpool and Blackburn with Darwen have been included with the figures for Lancashire. Figure 2 and 3 on pages 13 and 17 provide geographical and graphical illustrations of primary aggregate sales across the region for the AM08 period.

Table 1: Monitoring of total primary aggregate sales – North West 1994 – 2008 (million tonnes)

	AM94	AM95	AM96	AM97	AM98	AM99	AM00	AM01	AM02	AM03	AM04	AM05	AM06	AM07	AM08
Total Primary Aggregate Sales															
Limestone [1]	9.1	7.3	6.1	6.5	5.9	6.0	6.1	5.6	5.6	5.2	5.5	5.1	5.3	5.8	5.18
Sandstone & Igneous Rock [2]	6.3	6.0	5.37	5.06	4.90	4.58	4.2	4.5	4.6	4.12	3.95	3.53	3.55	3.62	2.84
Land-won Sand & Gravel	5.55	4.93	4.51	4.72	4.16	4.1	3.78	3.1	3.2	3.36	2.84	3.06	2.97	3.0	2.69
Marine Dredged Sand & Gravel	0.22	0.22	0.25	0.25	0.23	0.29	0.29	0.46	0.50	0.47	0.6	0.66	0.64	0.66	0.44
Harbour Authorities Sand & Gravel	~	~	~	~	~	~	~	~	0.1	0.03	~	~	0.02	~	0.02
TOTAL PRIMARY AGGREGATE SALES	**21.17**	**18.45**	**16.23**	**16.53**	**15.14**	**14.92**	**14.37**	**13.66**	**14.0**	**13.18**	**12.89**	**12.35**	**12.48**	**13.08**	**11.17**

1 Excludes Limestone used for non-aggregate purposes
2 Includes High Specification Aggregate (HSA)
NB: Figures may include some estimates by MPAs, totals may not add up due to rounding. Figures exclude Borrow Pits.

Table 2: Monitoring of crushed rock sales – North West 1994 – 2008 (million tonnes)

	AM94	AM95	AM96	AM97	AM98	AM99	AM00	AM01	AM02	AM03	AM04	AM05	AM06	AM07	AM08
LIMESTONE [1]															
Cumbria	4.8	3.8	3.2	3.5	3.2	3.4	3.4	3.0	2.9	2.6	2.8	2.6	2.7	2.8	2.7
Lancashire	4.3	3.5	2.9	3.0	2.7	2.6	2.7	2.6	2.7	2.6	2.7	2.5	2.6	3.0	2.48
TOTAL LIMESTONE	**9.1**	**7.3**	**6.1**	**6.5**	**5.9**	**6.0**	**6.1**	**5.6**	**5.6**	**5.2**	**5.5**	**5.1**	**5.3**	**5.8**	**5.18**
SANDSTONE & IGNEOUS ROCK															
Cumbria [2]	0.8	0.8	0.7	0.7	0.8	0.8	1	1.1	1.1	1.1	1.1	0.36	0.27	0.53	0.4
Cumbria - High Specification Aggregate (HSA)	~	~	~	~	~	~	~	~	~	~	~	0.74	0.69	0.7	0.75
Lancashire	2.7	2.8	2.63	2.17	2.1	1.8	1.7	1.9	2.2	1.6	1.3	1.2	1.0	1.26	0.98
Cheshire [3/4]	1.0	0.6	0.44	0.29	0.1	0.1	0.1	0.1	0.01	0.02	0.05	0.03	0.05	0.03	0.02
GtManchester/M'side/Halton/Warrington [5]	1.8	1.8	1.6	1.9	1.9	1.8	1.4	1.4	1.3	1.4	1.5	1.2	1.54	1.1	0.69
TOTAL SANDSTONE & IGNEOUS ROCK	**6.3**	**6.0**	**5.37**	**5.06**	**4.85**	**4.58**	**4.2**	**4.5**	**4.6**	**4.12**	**3.95**	**3.53**	**3.55**	**3.62**	**2.84**
TOTAL CRUSHED ROCK	**15.4**	**13.3**	**11.5**	**11.6**	**10.75**	**10.58**	**10.3**	**10.1**	**10.2**	**9.32**	**9.45**	**8.63**	**8.85**	**9.42**	**8.02**

1 Excludes Limestone used for non-aggregate purposes
2 Cumbria figures include the Lake District National Park
3 Prior to 1999 figures include Peak Park within Cheshire
4 Prior to 1998 figures *include* Halton and Warrington
5 Prior to 1998 figures *exclude* Halton and Warrington
NB: Figures may include some estimates by MPAs, total may not add up due to rounding. Figures exclude Borrow Pits.

Table 3: Monitoring of sand and gravel sales – North West 1994 – 2008 (million tonnes)

	AM94	AM95	AM96	AM97	AM98	AM99	AM00	AM01	AM02	AM03	AM04	AM05	AM06	AM07	AM08
LAND-WON SAND & GRAVEL															
Cumbria [1]	1.1	0.9	0.8	0.8	0.9	0.9	0.8	0.7	0.9	1.0	0.8	0.7	0.79	0.87	0.77
Lancashire	0.77	0.8	0.8	0.91	0.66	0.48	0.34	0.5	0.5	0.46	0.44	0.38	0.34	0.33	0.31
Cheshire [2/3]	3.2	2.9	2.65	2.56	2.3	2.48	2.33	1.7	1.4	1.4	1.1	1.58	1.44	1.51	1.17
GtManchester/M'side/Halton/Warrington[4]	0.48	0.33	0.26	0.5	0.3	0.24	0.31	0.23	0.4	0.5	0.5	0.4	0.4	0.3	0.44
TOTAL LAND-WON SAND & GRAVEL	**5.55**	**4.93**	**4.51**	**4.72**	**4.16**	**4.1**	**3.78**	**3.1**	**3.2**	**3.36**	**2.84**	**3.06**	**2.97**	**3.0**	**2.69**
MARINE DREDGED SAND & GRAVEL															
Cumbria	~	~	~	~	~	~	~	0.03	0.04	0.04	0.02	0.02	0.02	0.01	0.02
Lancashire	~	~	~	~	~	0.05	0.07	0.18	0.13	0.11	0.1	0.12	0.1	0.12	0.01
GtManchester/M'side/Halton/Warrington[4]	0.22	0.22	0.25	0.25	0.23	0.24	0.22	0.25	0.33	0.32	0.48	0.52	0.49	0.53	0.41
TOTAL MARINE SAND & GRAVEL	**0.22**	**0.22**	**0.25**	**0.25**	**0.23**	**0.29**	**0.29**	**0.46**	**0.5**	**0.47**	**0.6**	**0.66**	**0.64**	**0.66**	**0.44**
HARBOUR AUTHORITIES SAND & GRAVEL															
Cumbria	~	~	~	~	~	~	~	~	0.1	0.03	~	~	0.02	~	0.02
TOTAL SAND & GRAVEL	**5.77**	**5.15**	**4.76**	**4.97**	**4.39**	**4.34**	**4.07**	**3.56**	**3.8**	**3.86**	**3.44**	**3.72**	**3.63**	**3.66**	**3.15**

1 Cumbria figures include the Lake District National Park
2 Prior to 1999 figures include Peak Park within Cheshire
3 Prior to 1998 figures *include* Halton and Warrington
4 Prior to 1998 figures *exclude* Halton and Warrington
NB: Figures may include some estimates by MPAs, total may not add up due to rounding. Figures exclude Borrow Pits.

Table 4: Monitoring total of primary aggregate reserves – North West 1994 – 2008 (million tonnes)

	AM94	AM95	AM96	AM97	AM98	AM99	AM00	AM01	AM02	AM03	AM04	AM05	AM06	AM07	AM08
Total Primary Aggregate Reserves															
Limestone [1]	270.9	209.5	175.5	185.4	151.1	168.6	170.8	159.9	161.3	156.7	150.8	148.2	174.7	173.9	162.7
Sandstone & Igneous Rock [2]	266.6	245.6	228.0	215.4	196.65	191.9	179.3	172.8	166.6	158.9	168.4	152.9	164.8	172.2	169.96
Land-won Sand & Gravel	56.7	56.0	51.1	49.7	46.64	46.27	43.2	47.9	47.3	41.34	39.24	43.02	45.59	38.7	45.97
TOTAL PRIMARY AGGREGATE RESERVES	**610.4**	**500.4**	**454.6**	**450.5**	**394.4**	**406.77**	**393.3**	**380.6**	**375.2**	**356.9**	**358.6**	**343.5**	**385.1**	**384.8**	**378.63**

1 Excludes Limestone used for non-aggregate purposes
2 Includes High Specification Aggregate (HSA)
NB: Figures may include some estimates by MPAs, totals may not add up due to rounding. Figures exclude Borrow Pits.

Table 5: Monitoring of crushed rock reserves – North West 1994 – 2008 (million tonnes)

	AM94	AM95	AM96	AM97	AM98	AM99	AM00	AM01	AM02	AM03	AM04	AM05	AM06	AM07	AM08
LIMESTONE [1]															
Cumbria [2]	177.6	143.9	111.7	121.9	91.7[3]	111.8	116.7	106.0	102.0	99.2	96.1	97.9	97.7	102.5	110.05
Lancashire [4]	93.3	65.9	63.8	63.5	59.4	56.8	54.1	53.9	59.3	57.5	54.7	50.32	77.0	71.4	52.6
TOTAL LIMESTONE	**270.9**	**209.5**	**175.5**	**185.4**	**151.1**	**168.6**	**170.8**	**159.9**	**161.3**	**156.7**	**150.8**	**148.22**	**174.7**	**173.9**	**162.7**
SANDSTONE & IGNEOUS ROCK															
Cumbria [2]	77.1	76.3	69.6	67.7	66.8	67.5	66.5	65.0	63.0	62.0	60.9	48.85	49.2	48.69	47.75
Cumbria - High Specification Aggregate (HSA)	~	~	~	~	~	~	~	~	~	~	~	9.85	9.55	19.0	28.9
Lancashire	151.8	125.0	112.7	105.7	86.0	84.0	73.5	71.1	70.3	68.7	79.8	64.5	75.1	74.1	70.35
Cheshire [5/6]	9.8	9.4	10.2	9.6	8.52	8.4	8.36	6.5	5.6	5.6	5.4	5.4	5.35	5.52	5.6
GtManchester/M'side/Halton/ Warrington [7/8]	27.9	34.9	35.5	32.4	35.33	32.0	30.9	30.2	27.7	22.6	22.5	23.69	25.54	24.86	17.36
TOTAL SANDSTONE & IGNEOUS ROCK	**266.6**	**245.6**	**228.0**	**215.4**	**196.65**	**191.9**	**179.3**	**172.8**	**166.6**	**158.9**	**168.4**	**152.92**	**164.77**	**172.17**	**169.96**
TOTAL CRUSHED ROCK RESERVES	**553.7**	**444.4**	**403.5**	**400.8**	**347.75**	**360.5**	**350.1**	**332.7**	**327.9**	**315.6**	**319.4**	**300.51**	**339.47**	**346.07**	**332.66**

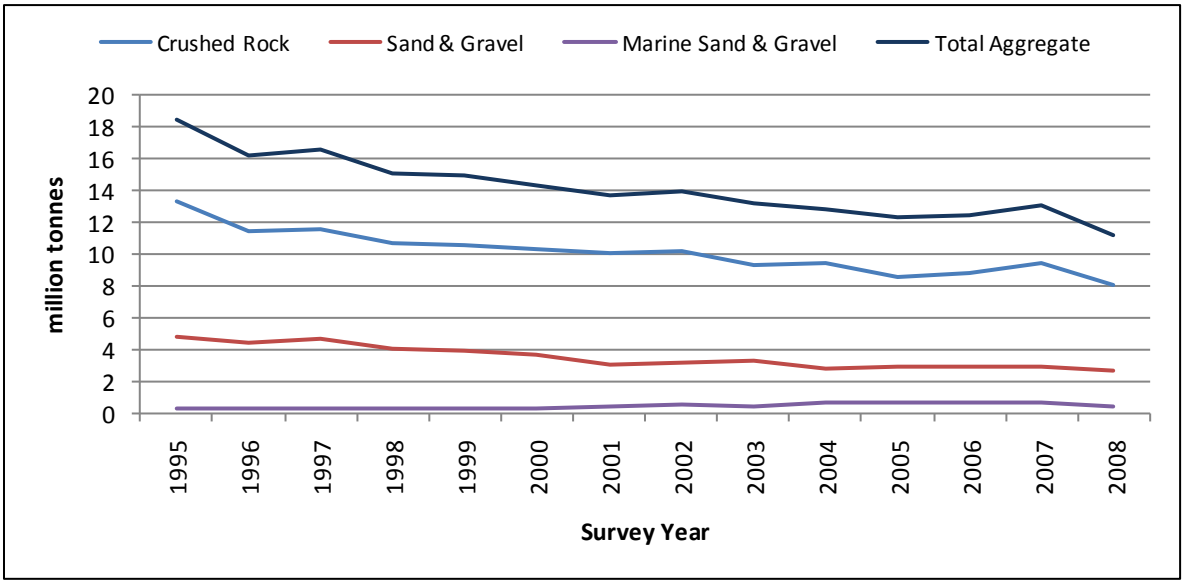
1 Excludes Limestone used for non-aggregate purposes
2 Cumbria includes the Lake District National Park
3 Nil return from one site
4 Data up to and including AM94 include reserves for non-aggregate
5 Prior to 1998 figures *include* Peak Park within Cheshire
6 Prior to 1998 figures *include* Halton and Warrington
7 Prior to 1998 figures *exclude* Halton and Warrington
NB: Figures may include some estimates by MPAs and totals may not add up due to rounding.

Table 6: Monitoring of sand and gravel reserves – North West 1994 – 2008 (million tonnes)

	AM94	AM95	AM96	AM97	AM98	AM99	AM00	AM01	AM02	AM03	AM04	AM05	AM06	AM07	AM08
LAND-WON SAND & GRAVEL															
Cumbria [1]	15.2	14.1	12.2	13.5	12.2	12.3	11.8	12.0	12.1	11.4	10.5	9.18	9.19	8.67	13.47
Lancashire	9.0	9.5	9.2	8.6	7.38	7.0	6.4	4.6	4.0	3.54	3.24	4.4	5.21	5.4	10.3
Cheshire [2]	29.3	28.3	25.9	24.1	21.7	19.3	17.9	24.6	23.5	19.7	19.2	20.53	21.3	19.52	16.4
GtManchester/M'side/Halton/Warrington[3]	3.2	4.1	3.8	3.5	5.36	7.67	7.1	6.7	7.7	6.7	6.3	8.91	9.89	5.15	5.8
TOTAL LAND-WON SAND & GRAVEL RESERVES	**56.7**	**56.7**	**51.1**	**49.7**	**46.64**	**46.27**	**43.2**	**47.9**	**47.3**	**41.34**	**39.24**	**43.02**	**45.59**	**38.74**	**45.97**

1 Cumbria includes the Lake District National Park
2 Prior to 1998 figures *include* Halton and Warrington
3 Prior to 1998 figures *exclude* Halton and Warrington
NB: Figures may include some estimates by MPAs and totals may not add up due to rounding. Figures exclude Borrow Pits.

Figure 2: Trends in primary aggregate sales in the North West 1995 – 2008 (million tonnes)



Total aggregate sales

4.3 Total aggregate sales declined during 2008 by approximately 14% from 13.08mt in 2007 to 11.17mt, the lowest recorded for fifteen years. Total aggregate sales had been increasing over the two previous survey years from 12.35mt in 2005 to 13.08mt in 2007.

Crushed rock sales

4.4 Total sales of crushed rock declined during the 2008 monitoring period by approximately 15%, from 9.42mt in 2007 to 8.02mt, the lowest recorded figure for fifteen years. Sales had been increasing since 2005 when a figure of 8.63mt was recorded. This year's figure of 8.02mt is some 2.38mt short of the 2001-2016 regional apportionment figure of 10.4mt per annum[2] for the North West region.

4.5 Sales of limestone decreased during 2008 in both Cumbria and Lancashire, by 10.7% from 5.8mt in 2007 to 5.18mt. This figure is broadly in line with those recorded since 2003.

4.6 Sales of sandstone and igneous rock have also decreased during the 2008 monitoring period by 21.6%, from 3.62mt in 2007 to 2.84mt. This is the lowest recorded figure for fifteen years. All parts of the region recorded a decrease in sales apart from Cumbria where an increase in sales of High Specification Aggregate (HSA) from 0.7mt in 2007 to 0.75mt was recorded, the highest recorded figure since 2005.

[2] National and Regional Guidelines for Aggregates Provision in England: 2001-2016, ODPM June 2003

Sand and gravel sales

4.7 Total sales of sand and gravel decreased during 2008 by 14%, from 3.66mt in 2007 to 3.15mt, the lowest recorded for over twenty years[3].

4.8 Sales of land-won sand and gravel decreased during 2008 by 10%, from 3.0mt in 2007 to 2.69mt, this is also the lowest recorded figure for fifteen years. All areas of the region recorded declining sales during the 2008 monitoring period. This figure is 0.74mt below the 2001-2016 regional apportionment figure of 3.43mt[4] per annum for the North West region.

4.9 Sales of marine dredged sand and gravel significantly decreased during the monitoring period by 33%, from 0.66mt in 2007 to 0.44mt[5]. However, overall sales have remained above the annualised apportionment figure of 0.25mt. Lancashire recorded a considerable decline of 91%, from 0.12mt to 0.01mt, whilst Cumbria recorded an increase of 100%, from 0.01mt in 2007 to 0.02mt.

Total aggregate reserves

4.10 Total aggregate reserves decreased during 2008 by approximately 1.6%, from 384.8mt in 2007 to 378.63mt. However, reserves have remained relatively stable over the past three monitoring periods and have remained higher than those recorded between 2002 and 2005.

Crushed rock reserves

4.11 Total reserves of crushed rock have decreased by 3.8% during 2008, from 346.07mt in 2007 to 332.66mt. Reserves are in line with the figure recorded, for the 2001 monitoring period, when a figure of 332.7mt was recorded.

4.12 Reserves of limestone have decreased by 6.4% from 173.9mt in 2007 to 162.7mt, but remain higher than figures recorded between 2002 and 2005. This fall in reserves is largely due to the reassessment at one quarry in Lancashire which has resulted in a reduction of 19mt in reserves. Reserves of limestone have increased in Cumbria by 7.4% from 102.5mt in 2007 to 110.05mt.

4.13 Reserves of sandstone and igneous rock (including HSA) have decreased by 1.3% during 2008 from 172.17mt in 2007 to 169.96mt. Cheshire and Cumbria recorded increased reserves by 1.5% and 13.2% respectively. All other parts of the region have experienced a decrease in reserves during the 2008 monitoring period, with the most sizeable reduction

[3] Historical monitoring statistics are included as Appendix D
[4] National and Regional Guidelines for Aggregates Provision in England: 2001-2016, ODPM June 2003
[5] This does not include harbour authorities

being in the Greater Manchester/Merseyside/Halton/Warrington area where there was a significant decrease of 30.2% from 24.86mt in 2007 to 17.36mt, the lowest recorded figure for over twenty years. This reduction can be attributed to the unexpected closure of two sites and reassessment of reserves at another site resulting in a loss of 5.95mt in total.

Sand and gravel reserves

4.14 Total reserves of sand and gravel increased by 18.6% during the 2008 monitoring period, from 38.74mt in 2007 to 45.97mt. Reserve figures remain higher than figures recorded since 1993 when a figure of 41.34mt was recorded. Lancashire experienced a considerable increase in reserves of 91% from 5.4mt in 2007 to 10.3mt. This increase is largely accounted for by a new permission being granted for the extraction of 4.2mt at Runshaw (Euxton). Cumbria also experienced a significant increase in reserves by 55.4% from 8.67mt in 2007 to 13.47mt due to permissions being granted at several sites. Greater Manchester/Merseyside/Halton/Warrington recorded an increase of 13% from 5.15mt in 2007 to 5.8mt, with reserves being released at Morleys Hall. Cheshire recorded a downturn in reserves of 16% from 19.52mt in 2007 to 16.4mt. This is due to the withdrawal of one site from the AM2008 monitoring survey, as the site had previously been included as a primary aggregate in error.

Landbanks

4.15 Landbanks have been calculated using the guidelines published by the ODPM on 10th June 2003, 'National and Regional Guidelines for Aggregate Provision in England 2001-2016' (guidelines are included as Appendix E).

4.16 The total landbank for crushed rock as at 31st December 2008 is 31.98 years. This is 1.3 years lower than the previous year's landbank of 33.28 years, but remains higher than in 2005 when a landbank of 28.9 years was recorded.

4.17 The total landbank for sand and gravel as at 31st December 2008 is 13.4 years. This is 1.93 years higher than the previous year's landbank of 11.47 years, but remains lower than in 2006 when a landbank of 12.59 years was recorded.

4.18 More detailed information regarding the aggregate landbanks is included in Section 5 and within Table 7 on page 22.

Commentary on trends

4.19 Table's 1-3 and Figure 2 illustrate the sales trends for primary aggregates across the North West region since 1995. Figure 2 shows that total aggregate sales had been in general decline over the past fifteen years, apart from an upward turn in sales between 2005 and 2007. Total sales have fallen considerably during the 2008 monitoring period by 14.6%

from 13.08mt in 2008 to 11.17mt, the lowest recorded figure for over twenty years. This is the most significant decline in sales since 1996 when sales fell by 12% to 16.23mt from 18.45mt in 1995.

4.20 One of the central reasons behind the notable fall in sales is the financial crisis experienced in 2007 leading to recession during 2008. The recession has caused a downturn in house building and major development, resulting in a reduction in the demand for primary aggregate. Whilst the economy remains unstable it is likely that primary aggregate sales will remain at a reduced level. However, it should be noted that aggregate supply will play a vital role in the recovering economy.

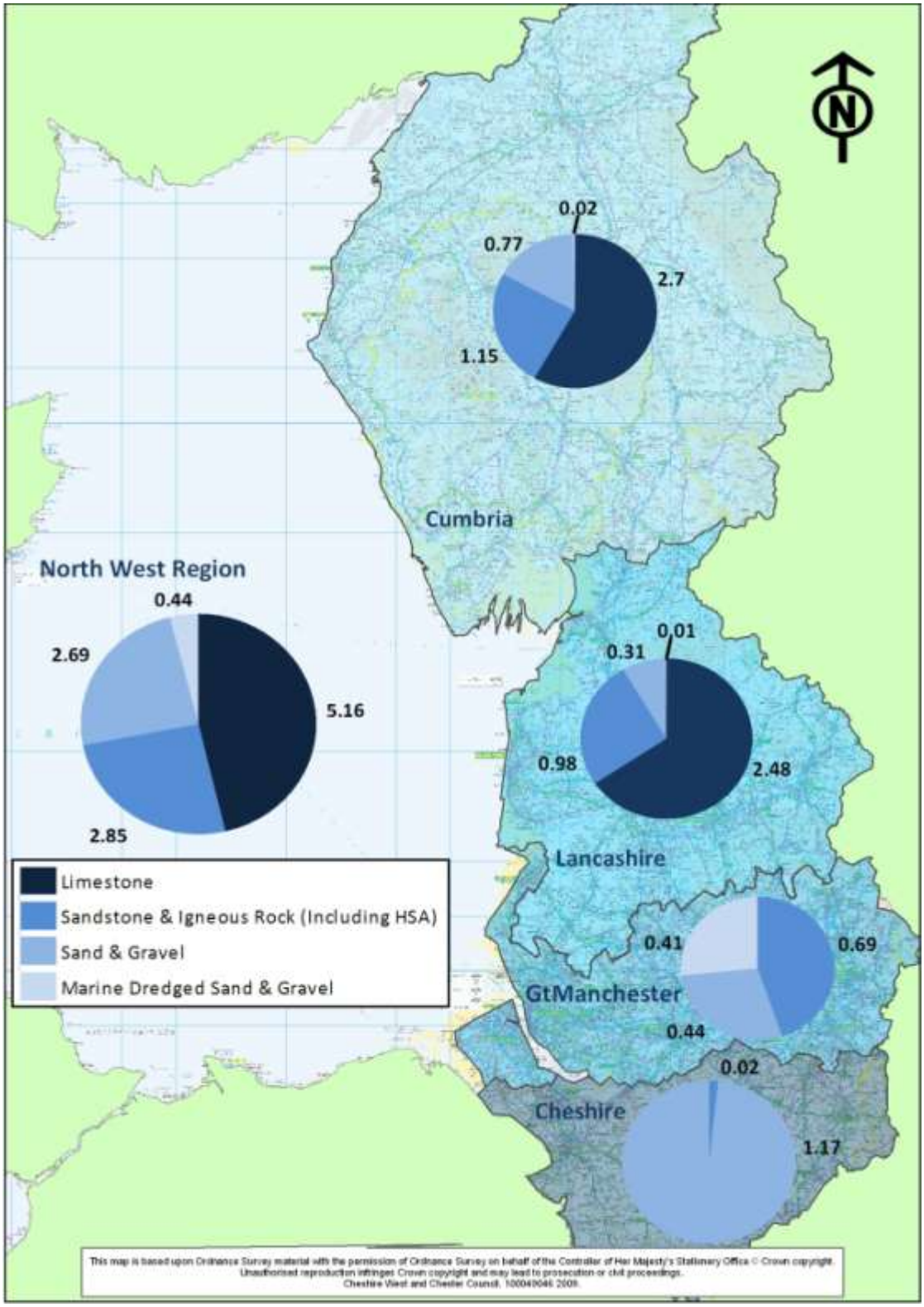
4.21 The Aggregate Levy and landfill tax also remain as reasons behind the general trend of declining sales since 2002. The Aggregate Levy was introduced in 2002 at a rate of £1.60 per tonne to establish the Sustainability Fund, an attempt at mitigating against the effects of quarrying e.g. dust, noise etc and encouraging the use of alternative materials. The Levy was increased to £1.95 per tonne on the 1st April 2008 and again on 1st April 2009 to £2.00 per tonne. Both the Aggregate Levy and the Landfill Tax have lead to an increased use of construction, demolition and excavation waste (CD&EW) and secondary resources.

4.22 Sales of crushed rock fell by approximately 15% from 9.42mt in 2007 to 8.02mt. Sales of land-won sand and gravel fell by 14% from 3.66mt in 2007 to 3.15mt. Sales of marine dredged sand and gravel fell by 33% from 0.66mt in 2007 to 0.44mt.

4.23 Total aggregate reserves have decreased by 1.6% from 384.8mt in 2007 to 378.63mt. One of the main reasons for the fall in reserves is the reassessment of limestone reserves at one quarry in Lancashire which resulted in a reduction of 19mt.

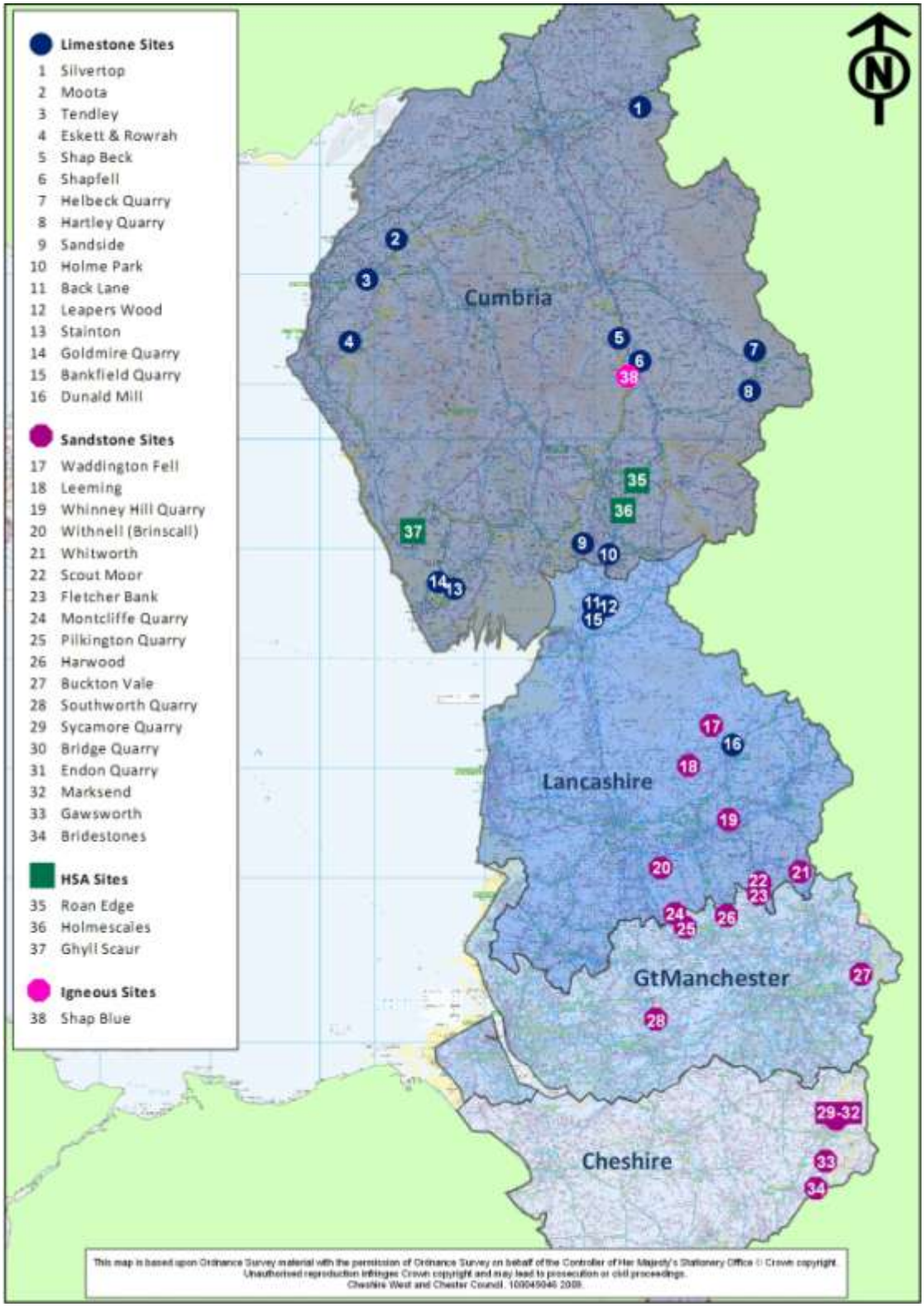
4.24 Figure 3 illustrates the distribution of aggregate sales across the North West region during the 2008 monitoring period. Figures 4-6 provide a geographical illustration of the sites included in the AM08 survey; more detailed information is included within Section 8 (Sub-regional Profiles). Active sites are those sites which have permitted reserves and have carried out minerals development during the 2008 monitoring period, inactive sites are those sites which have permitted reserves but no minerals development has been carried out during the monitoring period.

Figure 3: Primary aggregate sales in the North West 2008 (million tonnes)



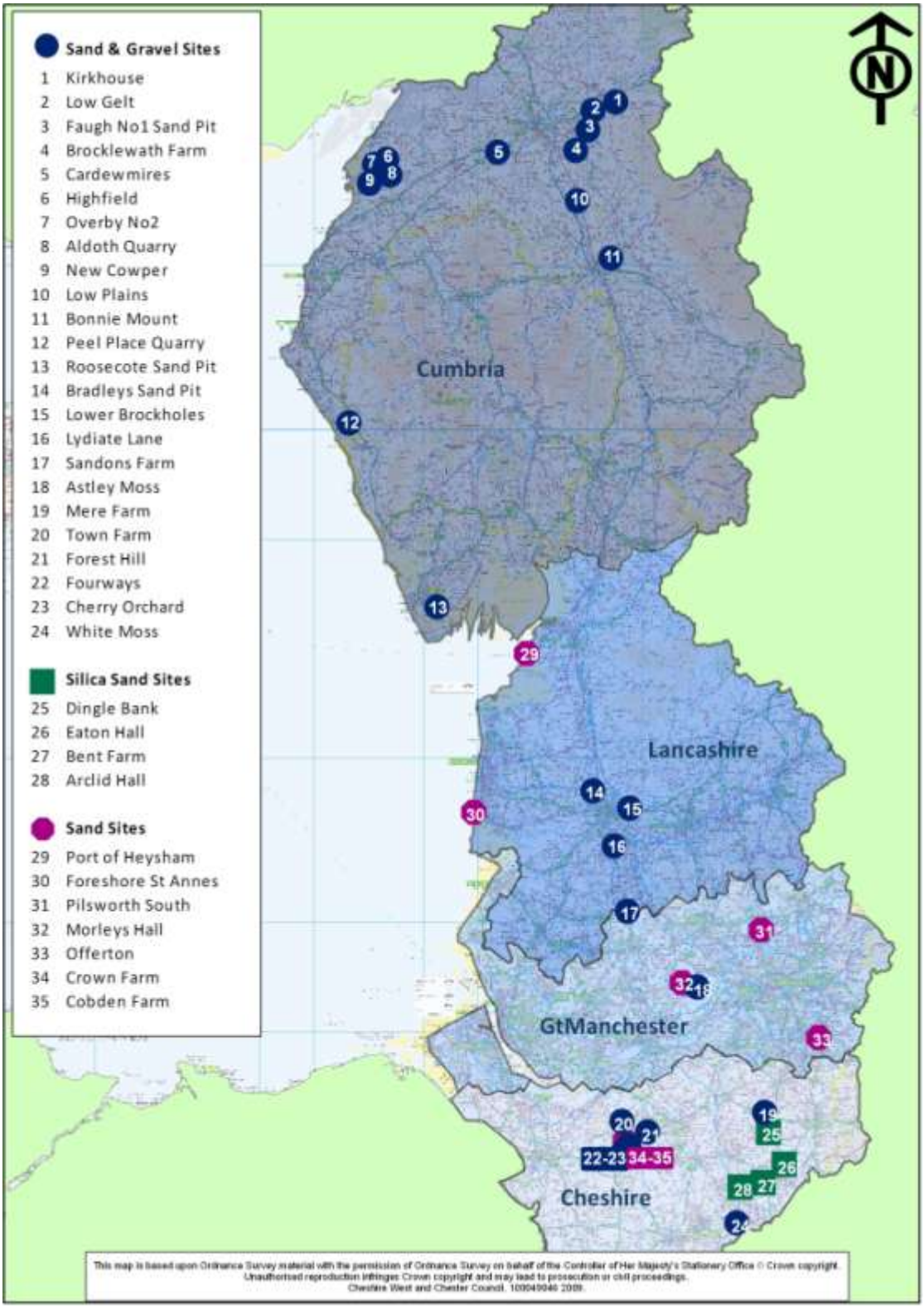
NB: For the purposes of mapping the areas of Merseyside, Halton and Warrington are included within the GtManchester sub-region

Figure 4: Active crushed rock sites in the North West 2008



NB: For the purposes of mapping the areas of Merseyside, Halton and Warrington are included within the GtManchester sub-region

Figure 5: Active sand and gravel sites in the North West 2008

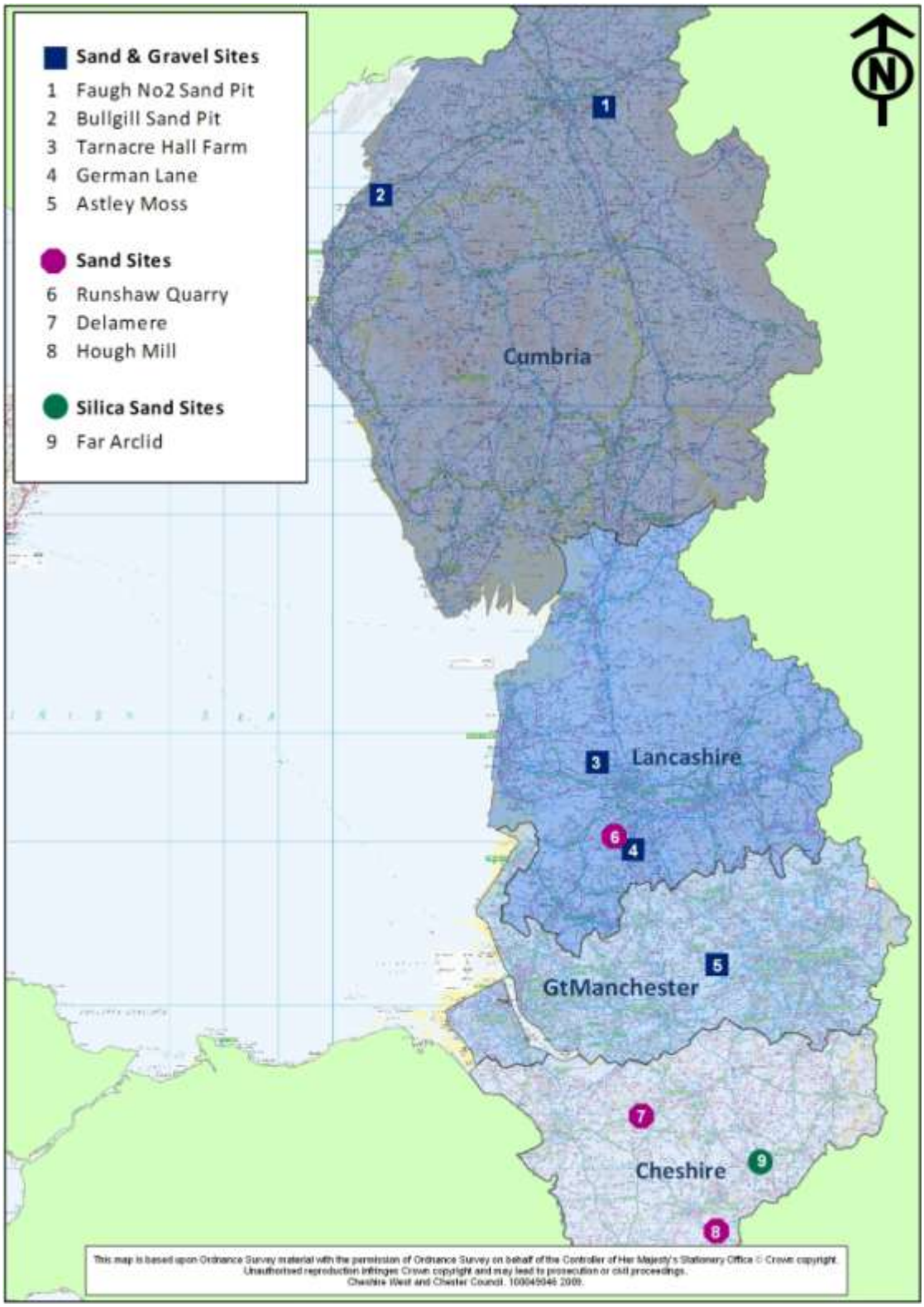


NB: For the purposes of mapping the areas of Merseyside, Halton and Warrington are included within the GtManchester sub-region

Figure 6: Inactive crushed rock sites in the North West 2008

NB: For the purposes of mapping the areas of Merseyside, Halton and Warrington are included within the GtManchester sub-region

Figure 7: Inactive sand and gravel sites in the North West 2008



NB: For the purposes of mapping the areas of Merseyside, Halton and Warrington are included within the GtManchester sub-region

5 MONITORING OF PRIMARY AGGREGATE LANDBANKS

5.1 The method for calculating landbanks is set out in Paragraph 70, of 'Minerals Planning Policy 1: Planning and Minerals' (MPS1), as: 'The length of the landbank should be calculated using the expected provision (supply in response to demand) included in the development plan expressed on an annual basis'.

5.2 On 29th June 2009 the Department for Communities and Local Government published revised national and regional guidelines for aggregate provision in England for the period 2005 – 2020. These revised guidelines are included within Appendix F. For the purposes of this report the landbanks have been calculated using the guidelines published by the ODPM on 10th June 2003, 'National and Regional Guidelines for Aggregate Provision in England 2001 – 2016', as they were still current during the AM08 period, they have also been included within Appendix E.

5.3 The regional landbanks as at 31st December 2008 calculated using the above method are set out in Table 7:

Table 7: Monitoring of landbanks – North West 2008

	Permitted Reserves as at 31.12.2008	2001-2016 Annual Apportionment (mt/pa)	Landbank as at 31.12.2008 (years)
Crushed Rock [1]			
Cumbria [2]	186.7	4.1	45.5
Lancashire	122.95	4.6	26.7
Cheshire	5.6	0.13	43.1
GtManchester/Merseyside/Halton/Warrington	17.36	1.65	10.5
Total Crushed Rock	**332.61**	**10.4**	**31.98**
Sand & Gravel [3]			
Cumbria [2]	13.47	0.7	19.24
Lancashire	10.3	0.5	20.6
Cheshire	16.4	1.97	8.3
GtManchester/Merseyside/Halton/Warrington	5.8	0.26	22.3
Total Sand & Gravel	**45.97**	**3.43**	**13.4**

1 Includes figures for High Specification Aggregate (HSA)
2 Cumbria includes Lake District National Park
3 Data excludes marine aggregate reserves

5.4 Figures 8 and 9 illustrate primary aggregate sales against the annualised apportionment figures provided by the 'National and Regional Guidelines for Aggregate Provision in England 2001 – 2016'. New guidelines published on 29th June 2009 are yet to be apportioned.

5.5 Figure 8 illustrates that sales of crushed rock have remained below the annualised apportionment figures since 1996. The annual apportionment was reduced in 2003, under revised guidelines[6], from 12.55mt to 10.4mt which has resulted in sales more closely reflecting the annualised requirement.

5.6 Figure 9 illustrates that sales of sand and gravel have gradually declined since 1997 when sales were in excess of the annualised apportionment figure of 4.65mt. The annual apportionment was reduced in 2003 in line with declining sales to 3.44mt. Since 2003 sales had been in excess of the annual apportionment requirement but have fallen sharply during the 2008 monitoring period to 0.75mt below the required figure.

[6] National and Regional Guidelines for Aggregate Provision in England 2001 – 2016

Figure 8: Crushed rock sales against annualised apportionment in the North West 1995 – 2008 (million tonnes)

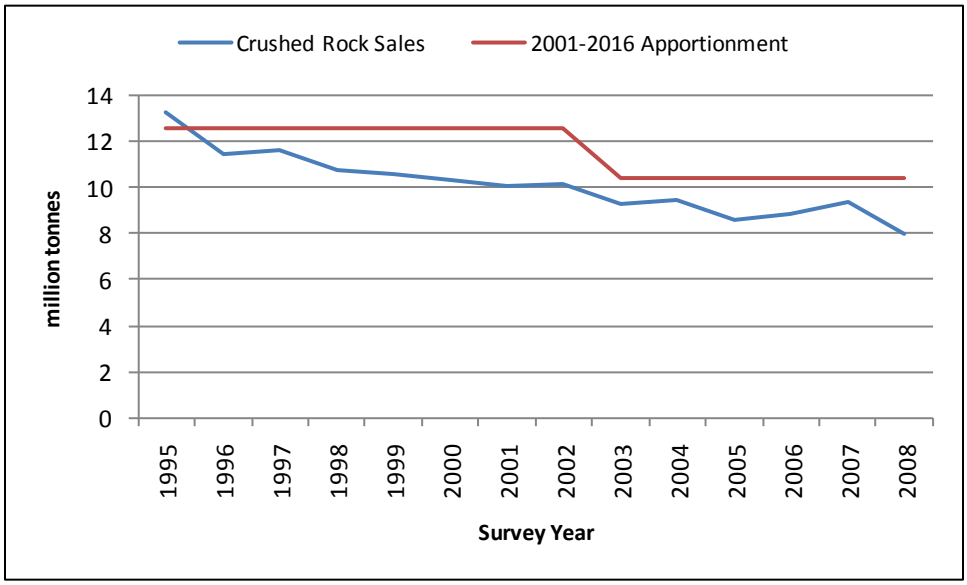
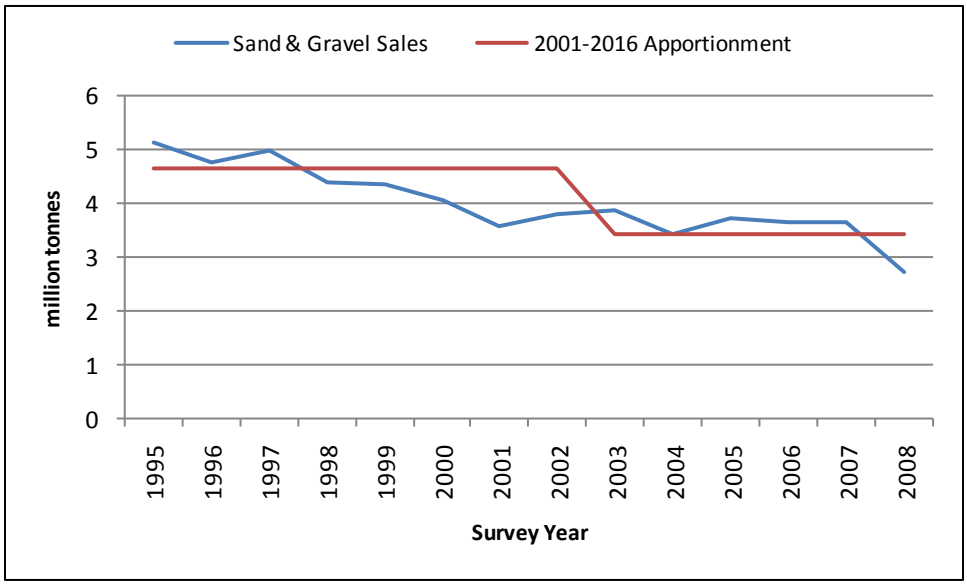


Figure 9: Sand and gravel sales against annualised apportionment in the North West 1995 – 2008 (million tonnes)



NB: Aggregate guidelines prior to 2003 are as specified within Annex A of Minerals Planning Guidance Note 6: Guidance for Aggregate Provision in England' (MPG6) published in 1994. The aggregate guideline figure for 2003 reflects the revised national and regional guidelines for aggregate provision as published by the ODPM on the 10th June 2003 (National and Regional Guidelines for Aggregate Provision in England 2001 – 2016).

6 MARINE SAND & GRAVEL LANDINGS FROM OFF THE NORTH WEST COAST

Active dredging off the North West coast (including Penrhyn, North Wales)

6.1 During November 2009 The Crown Estate along with the British Marine Aggregates Producers Association (BMAPA) published the reports 'The area involved – 11th annual report' and 'Marine aggregates, The Crown Estate licences, Summary of statistics 2008'. The figures detailed in Tables 8 and 9 are taken from these reports.

6.2 There are currently 9 licences operating across 4 active dredge areas off the North West coast. An application has been made for a further dredge area (Area 457) in Liverpool Bay. Table 10, on page 28, contains details of these licences and Figure 11, on page 29, illustrates the position of the active and application dredge areas.

6.3 During the 2008 monitoring period a total of 728,182 tonnes of aggregate was removed from off the North West coast, of which 432,889 was primary aggregate, 207,506 was secondary aggregate (contract fill) and 87,787 was removed from rivers (River Mersey)[7]. This figure is broadly in line with those recorded since 2005 and indicates that levels of extraction have remained fairly stable.

6.4 The authorised limit of removal currently stands at 1.38mt of primary aggregate per annum. The total amount of aggregate removed from off the North West coast during 2008 represents 52% of the authorised limit. It is clear that the current level of extraction remains well below the authorised limit.

6.5 During the same period 505,031 tonnes of aggregate was landed from off the North West coast, representing 69% of the total aggregate extracted. This figure is approx 29.7% lower than the figure recorded for 2007 and is the lowest recorded since 2001. The total amount of material landed from off the North West coast does not equate to the total removed due to market forces, material is landed where it is needed and not necessarily at the closest wharf to where it was removed.

[7] Data taken from Marine Aggregates The Crown Estate Licences Summary of Statistics 2008, The Crown Estate

Table 8: Marine dredged aggregate removed from off the North West coast

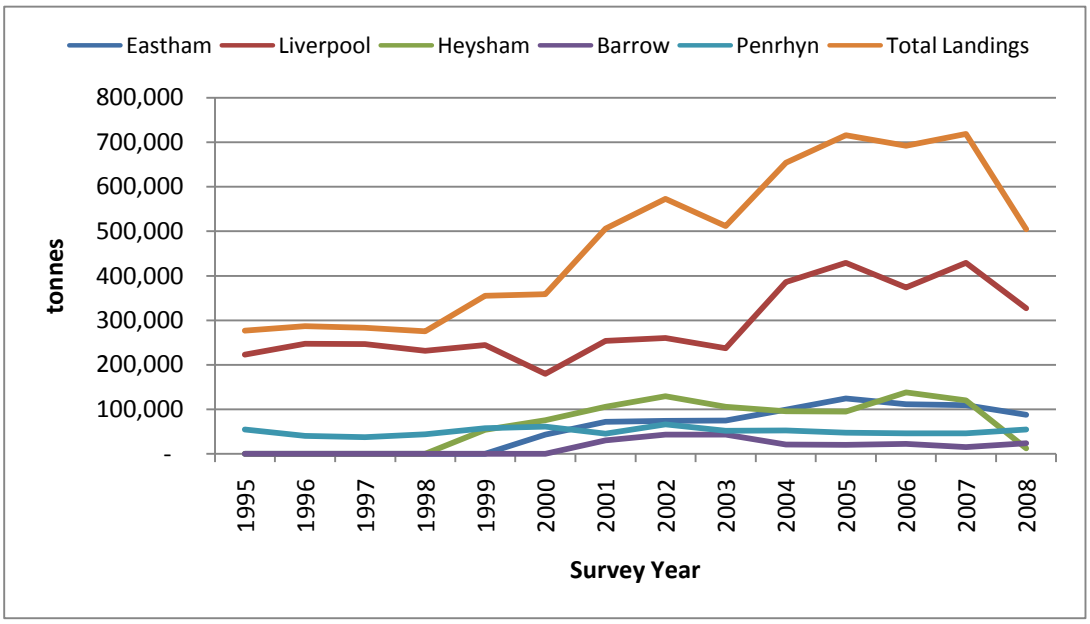
North West Region (inc Penrhyn N Wales)		1995	1996	1997	1998	1999	2000	2001	2002	2003	2004	2005	2006	2007	2008
Primary	Primary Aggregates removed	~	~	~	~	~	~	~	~	~	~	611,983	608,134	633,405	432,889
	Rivers and Miscellaneous removed	~	~	~	~	~	~	~	~	~	~	124,506	111,687	109,399	87,787
Secondary	Beach Nourishment removed	~	~	~	~	~	~	~	~	~	~	0	0	0	0
	Contract Fill removed	~	~	~	~	~	~	~	~	~	~	0	0	0	207,506
Total Aggregates Removed		**~**	**~**	**~**	**~**	**~**	**~**	**~**	**~**	**~**	**~**	**736,489**	**720,001**	**742,804**	**728,182**
Authorised limit of removal (mt) pa		**~**	**~**	**~**	**~**	**~**	**~**	**~**	**~**	**~**	**~**	**1.38**	**1.38**	**1.38**	**1.38**

~ Data not available
Data taken from the report 'Marine aggregates, The Crown Estate Licences, Summary of statistics' 2005, 2006, 2007 and 2008.

Table 9: Marine dredged aggregate landed from off the North West coast

Landing Point		1995	1996	1997	1998	1999	2000	2001	2002	2003	2004	2005	2006	2007	2008
England	Barrow	~	~	~	~	~	~	30,000	42,835	42,835	21,049	20,206	22,321	14,890	23,319
	Eastham	~	~	~	~	~	43,046	71,615	74,055	75,000	99,079	124,506	111,687	109,399	87,787
	Heysham	~	~	~	~	53,848	75,376	105,982	129,719	105,812	95,550	95,285	138,088	119,767	11,930
	Liverpool	222,610	247,197	246,598	231,072	243,882	179,444	253,382	260,258	237,262	385,886	428,842	373,812	428,635	327,094
Wales	Penrhyn	54,483	40,054	36,939	43,510	57,314	61,270	44,951	66,334	51,311	52,307	47,257	46,091	46,002	54,901
Total landed from off North West coast		**277,093**	**287,251**	**283,537**	**274,582**	**355,044**	**359,136**	**505,930**	**573,201**	**512,220**	**653,871**	**716,096**	**691,999**	**718,693**	**505,031**
Total landed excluding Penrhyn (N Wales)		222,610	247,197	246,598	231,072	297,730	297,866	460,979	506,867	460,909	601,564	668,839	645,908	672,691	450,130

Figure 10: Marine dredged aggregate landings from off the North West coast



Landings from off the North West coast (excluding Penrhyn, North Wales)

6.6 Landings from off the North West coast (excluding Penrhyn, North Wales) during the 2008 monitoring period amounted to 450,130 tonnes. This figure is approximately 33% lower than the figure recorded for 2007 and is the lowest since 2001. The most central reason for this downturn is the general slowing of construction activity in the North West region, due to the slowing of the wider economy, and increased demands for marine dredged aggregate elsewhere in the UK during the 2008 monitoring period.

Barrow

6.7 During 2008, 23,319 tonnes of aggregate was landed at Barrow from off the North West coast. This is an increase of approximately 56% from 14,890 tonnes in 2007. This figure remains below figures recorded between 2001–2003 but does however bring landings back in line with those recorded since 2004.

Eastham

6.8 Landings at Eastham have been slowly declining since 2005 when they were recorded at their highest at 124,506. Landings have again decreased during 2008 to 87,787, a fall of 21,612 tonnes (approximately 19%). However, landings remain broadly in line with figures recorded between 2001–2004.

Heysham

6.9 Landings at Heysham have significantly decreased during the 2008 monitoring period from 119,767 tonnes in 2007 to 11,930 tonnes, a decline of approximately 90%. This is the lowest recorded figure since 1999 when a figure of 53,848 was recorded. The main reason for this decline is the increased demand for marine dredged aggregate in Barrow where landings increased by approximately 56%.

Liverpool

6.10 Landings at Liverpool have decreased by approximately 23% from 428,635 tonnes in 2007 to 327,094 during 2008, a decline of 101,541 tonnes. However, landings remain higher than those recorded between 1995–2003 and are broadly in line with figures recorded since 2004.

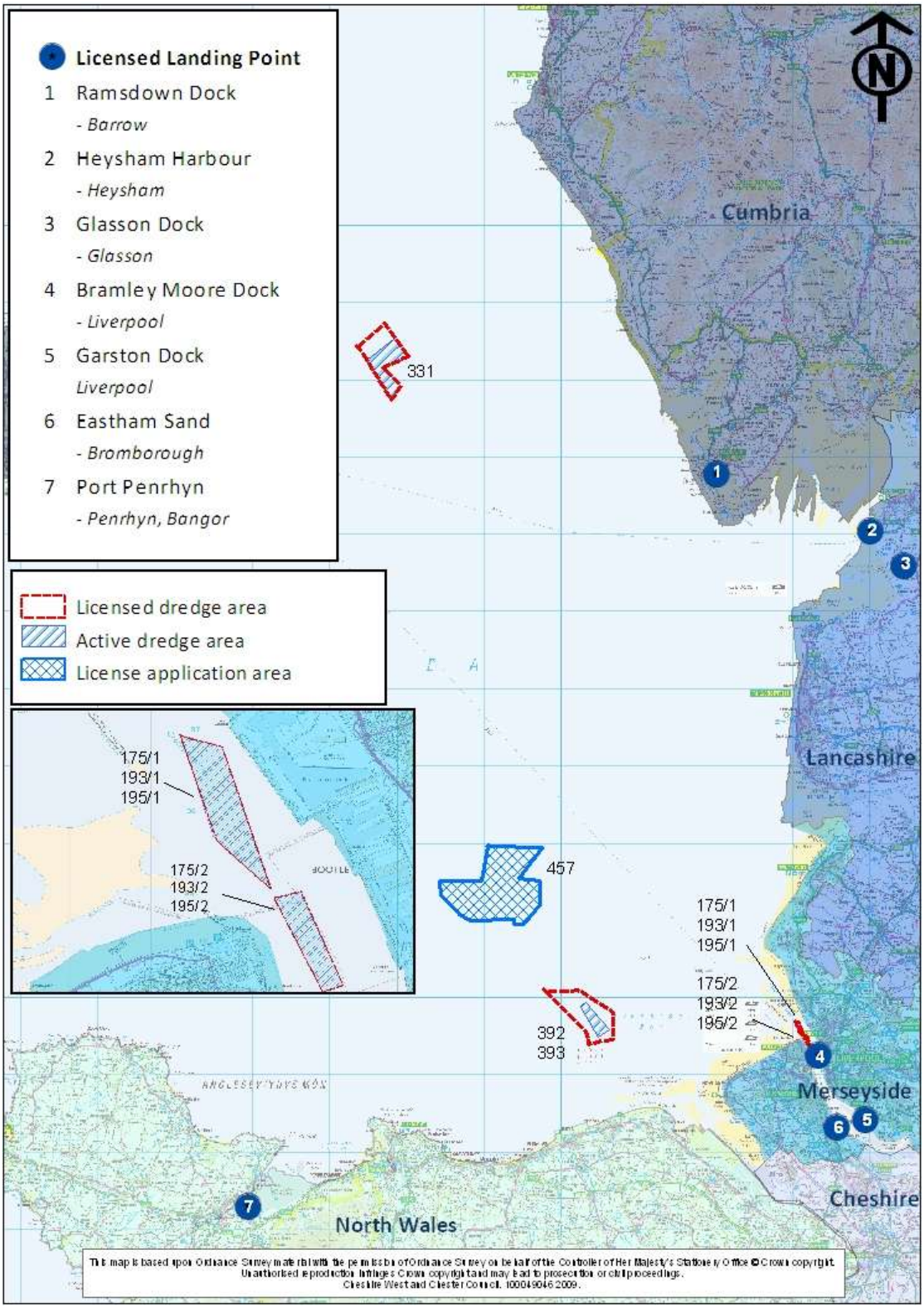
Summary

6.11 Table 8 details quantities of aggregate removed from off the North West coast during 2008 categorised by aggregate type, Table 9 details landings by port. Both tables use statistics published by the Crown Estate and the British Marine Aggregates Producers Association (BMAPA). Figure 10 plots the landings of marine aggregate since 1995 and Figure 11 illustrates the location of the applications pending, active and licensed dredging grounds off the North West coast, Table 10 provides details of these licenses.

Table 10: Marine dredged aggregate license holders

Active Dredge Area License Holders			
N°	**Operator**	**Approximate Centre Point Co-Ordinates**	**Status**
175/1	Norwest Sand & Ballast Co. Ltd	03 02.6151 W 53 27.1463 N	Active
193/1	CEMEX UK Materials Ltd	03 02.6151 W 53 27.1463 N	Active
195/1	Tarmac Marine Dredging Ltd	03 02.6151 W 53 27.1463 N	Active
175/2	Norwest Sand & Ballast Co. Ltd	03 01.7218 W 53 26.3069 N	Active
193/2	CEMEX UK Materials Ltd	03 01.7218 W 53 26.3069 N	Active
195/2	Tarmac Marine Dredging Ltd	03 01.7218 W 53 26.3069 N	Active
331	Tarmac Marine Dredging Ltd	03 52.2050 W 54 12.1980 N	Active
392	Tarmac Marine Dredging Ltd	03 26.2040 W 53 27.4050 N	Active
393	Norwest Sand & Ballast Co. Ltd	03 26.2040 W 53 27.4050 N	Active
457	Westminster Gravels Ltd	03 32.3590 W 53 36.9250 N	Yet to commence

Figure 11: Applications pending, licensed dredging grounds and landing points in North West coastal waters



NB: Merseyside is part of the GtManchester sub-region

7 MONITORING OF PLANNING APPLICATIONS

7.1 The monitoring of planning applications provides essential information on new permissions and reserves. If problems arise in meeting landbank requirements, monitoring of planning applications provides one means of identifying the causes.

7.2 Table 11 gives details of planning applications received for aggregate extraction in the North West region, granted or refused planning permission during the period 1st January 2008 to 31st December 2008. During the monitoring period all application were granted permission. Table 12 provides details of planning applications pending as at 31st December 2008. More detailed information regarding planning applications determined and pending is included within the sub-regional profiles.

Table 11: Monitoring of mineral planning applications determined 1st January 2008 - 31st December 2008

	Crushed Rock (mt)		Sand & Gravel (mt)	
	Granted	Refused	Granted	Refused
Cheshire	~	~	0.9	~
Cumbria	18.9	~	6.27	~
Lancashire	~	~	4.2	~
GtManchester	~	~	0.175	~
Merseyside	~	~	~	~
Warrington	~	~	~	~
Total	**18.9mt**	**~**	**11.545mt**	**~**

Table 12: Monitoring of mineral planning applications pending as at 31st December 2008

	Crushed Rock (mt)	Sand & Gravel (mt)
Cheshire	~	3.0
Cumbria	5.2	~
Lancashire	~	0.76
GtManchester	0.4	1.4
Merseyside	1.06	~
Warrington	~	~
Total	**6.66mt**	**5.16mt**

8 SUB-REGIONAL PROFILES

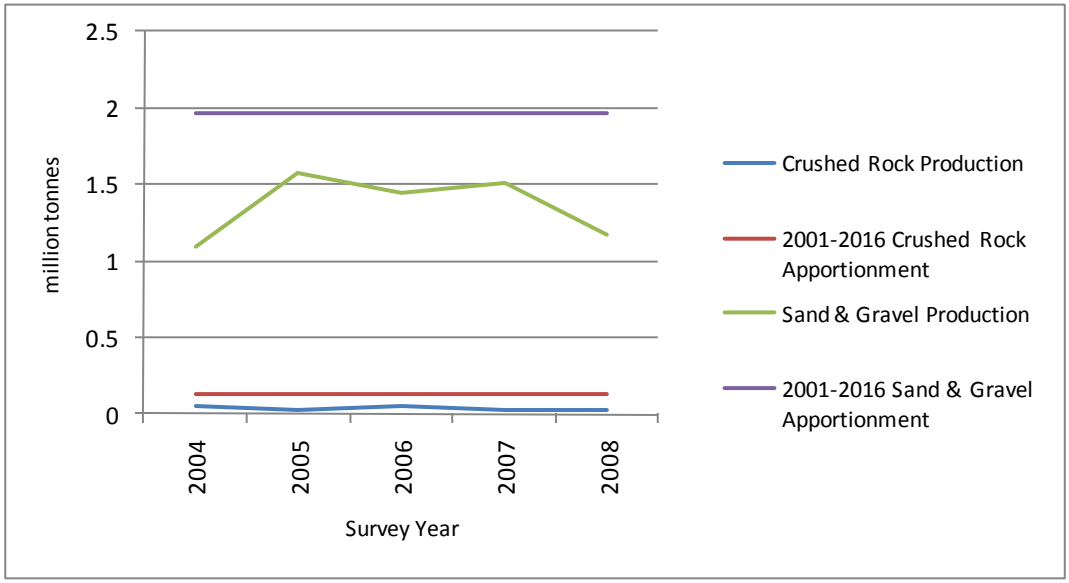
CHESHIRE

8.1 On the 1st April 2009 Cheshire County Council and the six district councils were abolished and replaced by the two new unitary authorities of Cheshire East and Cheshire West and Chester. This report deals with minerals activity during the period 1st January to 31st December 2008 and therefore Cheshire is treated as one authority area.

Total aggregate sales

8.2 Table 13 illustrates total primary aggregate sales in Cheshire 1994-2008. Figure 12 illustrates primary aggregate sales in Cheshire compared to the annualised apportionment as per the National and Regional Guidelines for Aggregate Provision in England 2001-2016.

Figure 12: Cheshire primary aggregate sales against annualised apportionment



8.3 Total aggregate sales in Cheshire decreased during the 2008 monitoring period by 22.7% from 1.54mt in 2007 to 1.19mt. This is the lowest recorded for over twenty years apart from in 2004 when a figure of 1.15 was recorded.

Total aggregate reserves

8.4 Table 14 illustrates total primary aggregate reserves in Cheshire 1994-2008. Reserves in Cheshire decreased by 12% during the 2008 monitoring period, from 25.04mt in 2007 to 22mt. This is the lowest recorded reserve figure for over twenty years.

Table 13: Monitoring of total primary aggregate sales –Cheshire sub-region 1994 – 2008 (million tonnes)

	AM94	AM95	AM96	AM97	AM98	AM99	AM00	AM01	AM02	AM03	AM04	AM05	AM06	AM07	AM08
LAND-WON SAND & GRAVEL															
Land-won Sand & Gravel	3.2	2.9	2.65	2.56	2.3	2.48	2.33	1.7	1.4	1.4	1.1	1.58	1.44	1.51	1.17
TOTAL SAND & GRAVEL SALES	**3.2**	**2.9**	**2.65**	**2.56**	**2.3**	**2.48**	**2.33**	**1.7**	**1.4**	**1.4**	**1.1**	**1.58**	**1.44**	**1.51**	**1.17**
CRUSHED ROCK															
Sandstone & Igneous Rock	1.0	0.6	0.44	0.29	0.1	0.1	0.1	0.1	0.01	0.02	0.05	0.03	0.05	0.03	0.02
TOTAL CRUSHED ROCK SALES	**1.0**	**0.6**	**0.44**	**0.29**	**0.1**	**0.1**	**0.1**	**0.1**	**0.0**	**0.02**	**0.1**	**0.03**	**0.05**	**0.0**	**0.02**
TOTAL AGGREGATE SALES	**4.20**	**3.50**	**3.09**	**2.85**	**2.40**	**2.58**	**2.43**	**1.80**	**1.41**	**1.42**	**1.15**	**1.61**	**1.49**	**1.54**	**1.19**

NB Data up to and including AM98 *includes* Peak Park, Halton and Warrington within Cheshire

Table 14: Monitoring of total primary aggregate reserves –Cheshire sub-region 1994 – 2008 (million tonnes)

	AM94	AM95	AM96	AM97	AM98	AM99	AM00	AM01	AM02	AM03	AM04	AM05	AM06	AM07	AM08
SAND & GRAVEL															
Land-won Sand & Gravel	29.3	28.3	25.9	24.1	21.7	19.3	17.9	24.6	23.5	19.7	19.2	20.53	21.3	19.52	16.4
TOTAL SAND & GRAVEL RESERVE	**29.3**	**28.3**	**25.9**	**24.1**	**21.7**	**19.3**	**17.9**	**24.6**	**23.5**	**19.7**	**19.2**	**20.53**	**21.3**	**19.52**	**16.4**
CRUSHED ROCK															
Sandstone & Igneous Rock	9.8	9.4	10.2	9.6	8.52	8.4	8.36	6.5	5.6	5.6	5.4	5.4	5.35	5.52	5.6
TOTAL CRUSHED ROCK RESERVE	**9.8**	**9.4**	**10.2**	**9.6**	**8.5**	**8.4**	**8.36**	**6.5**	**5.6**	**5.6**	**5.4**	**5.4**	**5.35**	**5.5**	**5.6**
TOTAL AGGREGATE RESERVE	**39.1**	**37.7**	**36.1**	**33.7**	**30.22**	**27.7**	**26.26**	**31.1**	**29.1**	**25.3**	**24.6**	**25.93**	**26.65**	**25.04**	**22.0**

NB Data up to and including AM98 *includes* Peak Park, Halton and Warrington within Cheshire

Crushed rock

8.5 Total crushed rock sales decreased by 0.01mt during the 2008 monitoring period, a fall of approximately 33% from 0.03mt in 2007 to 0.02mt. This is below the annualised requirement of 0.13mt but is consistent with figures recorded from 1998-2003.

8.6 Reserves of crushed rock increased during the 2008 monitoring period by 1.5% from 5.52mt in 2007 to 5.6mt. This figure is 0.1mt higher than would have been expected given the low levels of sales during 2008. However, there have been some reassessments of reserves during the monitoring period that have lead to a small increase in reserves at some quarries.

8.7 The landbank for crushed rock as at 31st December 2008 is 43.1 years. The landbank therefore remains largely unchanged from 42.5 years as at 31st December 2007.

Sand and gravel

8.8 Total sand and gravel sales decreased by 0.34mt during the 2008 monitoring period, a fall of approximately 22.5% from 1.51mt in 2007 to 1.17mt. This is below the annualised requirement of 1.97mt and is the lowest recorded figure for over twenty years apart from 2004 when a figure of 1.1 was recorded.

8.9 Reserves of sand and gravel have decreased during 2008 by 16% from 19.52mt in 2007 to 16.4mt, the lowest recorded figure for over twenty years. This is approximately 1.95mt lower than what would have been expected given the low levels of sales during 2008. This reduction in reserve figure is due to the withdrawal of one site from the AM2008 monitoring survey. This site had previously been counted as primary aggregate in error.

8.10 The landbank for sand and gravel as at 31st December 2008 is 8.3 years. This is 1.6 years lower than at 31st December 2007. This reduction in landbank can be attributed to the withdrawal of one site from the annual monitoring survey as mentioned above.

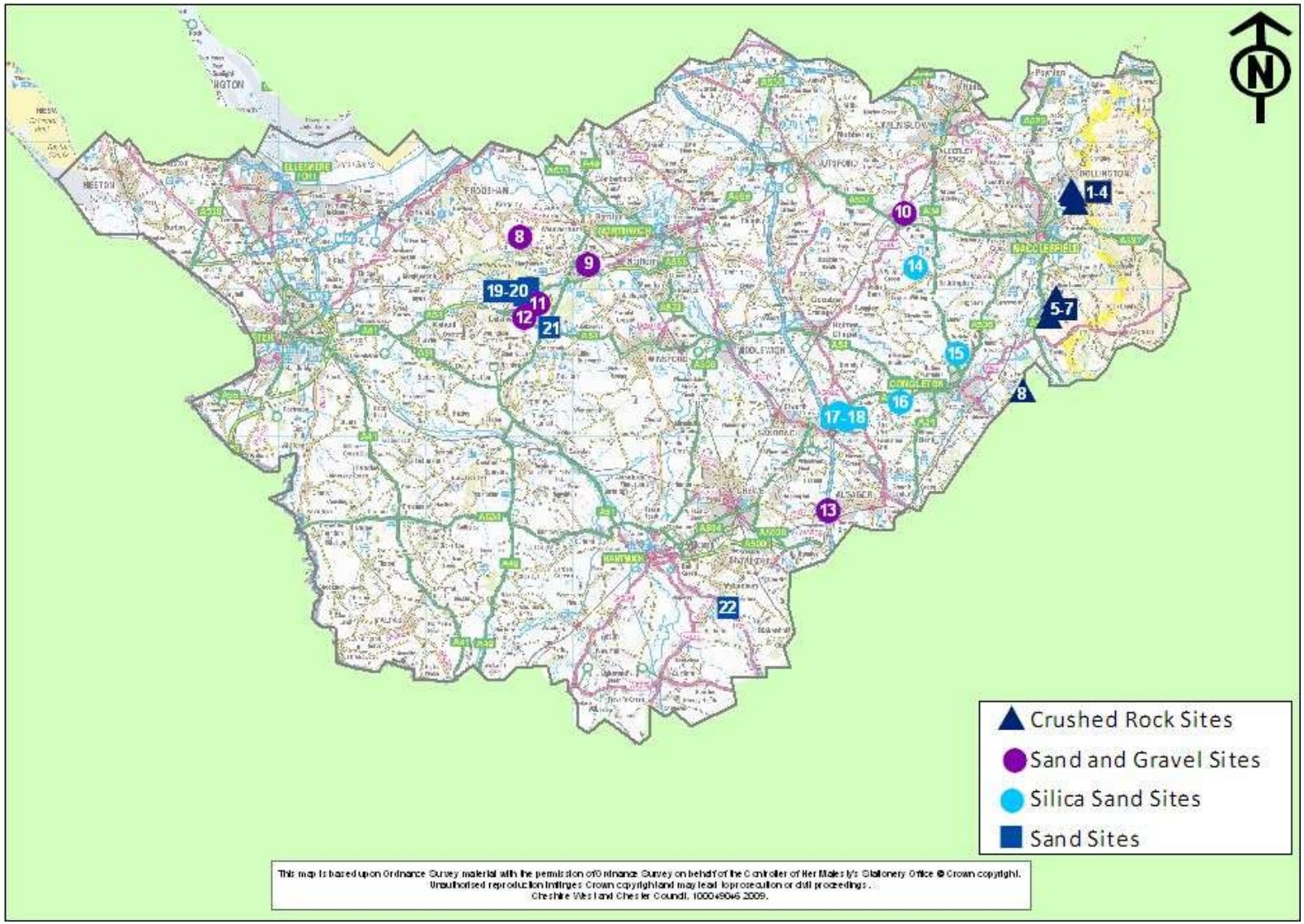
Construction activity

8.11 Significant investment continued during 2008 especially in Chester where the development of the HQ building was completed along with several other schemes commencing, including the Delamere Street Development, a £34m development of new housing, office and retail accommodation; and The Old Port housing development.

Table 15: Cheshire sites included in AM2008 aggregate monitoring survey

▲ Crushed Rock Sites					
N°	**Site Name**	**Grid Reference**	**Operator**	**Aggregate Type**	**Status**
1	Sycamore Quarry	SJ 939 764	A.M & D Earl	Sandstone	Active
2	Endon Quarry	SJ 941 760	Park Skip Hire	Sandstone and Gritstone	Active
3	Bridge Quarry	SJ 939 767	Multigrove Limited	Sandstone	Active
4	Marksend	SJ 942 757	A.M & D Earl	Gritstone	Active
5	Gawsworth	SJ 705 869	Wyman Limited	Gritstone	Active
6	Lee Hills	SJ 928 691	Mr R Rathbone	Gritstone	Inactive
7	Rough Hey	SJ 923 683	Wyman Limited	Gritstone	Inactive
8	Bridestones	SJ 909 700	Bridestone Stone	Sandstone	Active
● Sand & Gravel Sites					
N°	**Site Name**	**Grid Reference**	**Operator**	**Aggregate Type**	**Status**
8	Town Farm	SJ 565 740	Marchington Stone Limited	Sand & Gravel	Active
9	Forest Hill	SJ 611 717	CEMEX RMC Ltd	Sand & Gravel	Active
10	Mere Farm	SJ 834 744	Hanson Quarry Products Europe Ltd	Sand & Gravel	Active
11	Fourways	SJ 572 693	Tarmac Ltd	Sand & Gravel	Active
12	Cherry Orchard	SJ 568 680	Cherry Orchard Sand Unit	Sand & Gravel	Active
13	White Moss	SJ 775 548	Land Recovery Limited	Sand & Gravel	Active
● Silica Sand Sites					
N°	**Site Name**	**Grid Reference**	**Operator**	**Aggregate Type**	**Status**
14	Dingle Bank	SJ 815 748	Sibelco UK Ltd	Slica Sand	Active
15	Eaton Hall	SJ 861 643	Tarmac Ltd	Silica Sand	Active
16	Bent Farm	SJ 828 623	Sibelco UK Ltd	Silica Sand	Active
17	Arclid Hall	SJ 786 613	Bathgate Silica Sand Ltd	Silica Sand	Active
18	Far Arclid	SJ 785 615	Bathgate Silica Sand Ltd	Silica Sand	Inactive
■ Sand Sites					
N°	**Site Name**	**Grid Reference**	**Operator**	**Aggregate Type**	**Status**
19	Crown Farm	SJ 575 703	Tarmac Ltd	Construction Sand	Active
20	Delamere	SJ 564 698	Tarmac Ltd	Construction Sand	Inactive
21	Cobden Farm	SJ 585 675	Tarmac Ltd	Construction Sand	Active
22	Hough Mill	SJ 702 492	Anthony Construction Ltd	Construction Sand	Restoration

Figure 13: Spatial distribution of minerals working in Cheshire 2008



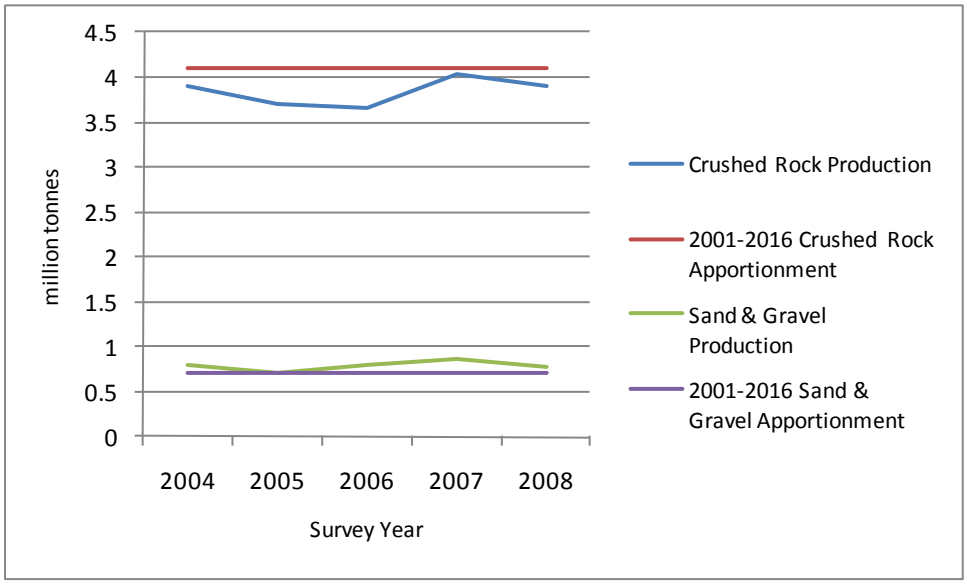
CUMBRIA

8.12 For the purposes of RAWP annual monitoring, the Cumbria sub-region includes the Lake District National Park.

Total aggregate sales

8.13 Table 16 illustrates total primary aggregate sales in Cumbria 1994-2008. Figure 14 illustrates primary aggregate sales in Cumbria against the annualised apportionment requirements as per the National and Regional Guidelines for Aggregate Provision in England 2001-2016.

Figure 14: Cumbria primary aggregate sales against annualised apportionment



8.14 Total aggregate sales in Cumbria decreased during the 2008 monitoring period by 5%, from 4.91mt in 2007 to 4.66mt[8]. This figure is broadly in line with figures recorded since 2003.

Total aggregate reserves

8.15 Table 17 illustrates total primary aggregate reserves in Cumbria 1994-2008. Total aggregate reserves in Cumbria increased during 2008 by 11.9%, from 178.86mt to 200.17mt. This is the highest recorded reserve figure since 1997 when a figure of 203.1mt was recorded. The rise in reserve figures can be attributed to the granting of several permissions for the extraction of significant amounts of primary aggregate during 2008 (Appendix B).

[8] Includes harbour authorities and marine dredged sand and gravel sales

Table 16: Monitoring of total primary aggregate sales –Cumbria sub-region 1994 – 2008 (million tonnes)

	AM94	AM95	AM96	AM97	AM98	AM99	AM00	AM01	AM02	AM03	AM04	AM05	AM06	AM07	AM08
SAND & GRAVEL															
Land-won Sand & Gravel	1.1	0.9	0.8	0.8	0.9	0.9	0.8	0.7	0.9	1.0	0.8	0.7	0.79	0.87	0.77
Marine Dredged Sand & Gravel	~	~	~	~	~	~	~	0.03	0.04	0.04	0.02	0.02	0.02	0.01	0.02
Harbour Authorities Sand & Gravel	~	~	~	~	~	~	~	~	0.1	0.03	~	~	0.02	~	0.02
TOTAL SAND & GRAVEL SALES	**1.1**	**0.9**	**0.8**	**0.8**	**0.9**	**0.9**	**0.8**	**0.7**	**1.04**	**1.1**	**0.82**	**0.72**	**0.83**	**0.88**	**0.81**
CRUSHED ROCK															
Limestone[1]	4.8	3.8	3.2	3.5	3.2[2]	3.4	3.4	3.0	2.9	2.6	2.8	2.6	2.7	2.8	2.7
Sandstone & Igneous Rock	0.8	0.8	0.7	0.7	0.8	0.8	1	1.1	1.1	1.1	1.1	0.36	0.27	0.53	0.4
High Specification Aggregate (HSA)	~	~	~	~	~	~	~	~	~	~	~	0.74	0.69	0.7	0.75
TOTAL CRUSHED ROCK SALES	**5.6**	**4.6**	**3.9**	**4.2**	**4.0**	**4.2**	**4.4**	**4.1**	**4.0**	**3.7**	**3.9**	**3.7**	**3.66**	**4.0**	**3.85**
TOTAL AGGREGATE SALES	**5.6**	**4.6**	**3.9**	**4.2**	**4.0**	**4.2**	**4.4**	**4.1**	**4.0**	**3.7**	**3.9**	**3.7**	**3.66**	**4.03**	**3.85**

1 Excludes limestone for non-aggregate purposes
2 Nil return from one site
NB Cumbria includes the Lake District National Park

Table 17: Monitoring of total primary aggregate reserves –Cumbria sub-region 1994 – 2008 (million tonnes)

	AM94	AM95	AM96	AM97	AM98	AM99	AM00	AM01	AM02	AM03	AM04	AM05	AM06	AM07	AM08
LAND-WON SAND & GRAVEL															
Land-won Sand & Gravel	15.2	14.1	12.2	13.5	12.2	12.3	11.8	12.0	12.1	11.4	10.5	9.18	9.19	8.67	13.47
TOTAL SAND & GRAVEL RESERVE	**15.2**	**14.1**	**12.2**	**13.5**	**12.2**	**12.3**	**11.8**	**12.0**	**12.1**	**11.4**	**10.5**	**9.18**	**9.19**	**8.67**	**13.47**
CRUSHED ROCK															
Limestone	177.6	143.9	111.7	121.9	91.7	111.8	116.7	106.0	102.0	99.2	96.1	97.9	97.7	102.5	110.05
Sandstone & Igneous Rock	77.1	76.3	69.6	67.7	66.8	67.5	66.5	65.0	63.0	62.0	60.9	48.85	49.2	48.69	47.75
High Specification Aggregate (HSA)	~	~	~	~	~	~	~	~	~	~	~	9.85	9.55	19.0	28.9
TOTAL CRUSHED ROCK RESERVE	**254.7**	**220.2**	**181.3**	**189.6**	**158.5**	**179.3**	**183.2**	**171.0**	**165.0**	**161.2**	**157.0**	**156.6**	**156.5**	**170.2**	**186.7**
TOTAL AGGREGATE RESERVE	**269.9**	**234.3**	**193.5**	**203.1**	**170.7**	**191.6**	**195.0**	**183.0**	**177.1**	**172.6**	**167.5**	**165.78**	**165.64**	**178.86**	**200.17**

1 Excludes limestone for non-aggregate purposes
NB Cumbria includes the Lake District National Park

Crushed Rock

8.16 Sales of crushed rock decreased by 4.5% during the 2008 monitoring period, from 4.03mt in 2007 to 3.85mt. This is in line with sales recorded for 2004-2006 but remains slightly below the annualised requirement of 4.1mt.

8.17 Sales of limestone decreased by 3.5% from 2.8mt in 2007 to 2.7mt. This is in line with the slight decrease in overall crushed rock sales. Sales of igneous rock and HSA also decreased by 6.5% from 1.23mt in 2007 to 1.15mt.

8.18 Overall reserves of crushed rock increased by 9.7% from 170.19mt in 2007 to 186.7mt, the highest recorded figure since 1997 when a figure of 189.6mt was recorded. This increase is in line with the recorded increase in total aggregate reserves.

8.19 Reserves of limestone have increased by approximately 7.4% from 102.5mt in 2007 to 110.05mt; bringing reserves back in line with those recorded in 2000. This rise is due to the release of 8.2mt of limestone at Tendley Quarry and 10.7mt of HSA at Roan Edge. Reserves of igneous rock and HSA have increased by 13.2% from 67.69mt in 2007 to 76.65 but remain higher than figures recorded for 2001-2006.

8.20 The landbank for crushed rock as at 31st December 2008 is 45.5 years. The landbank has increased by 4 years, from 41.5 years as at 31st December 2007.

Sand and gravel

8.21 Sales of land won sand and gravel decreased by 11.5% during 2008 from 0.87mt in 2007 to 0.77mt, however this remains above the annualised requirement of 0.7mt and is in line with figures recorded for 2005 and 2006.

8.22 Reserves of sand and gravel have increased by 55% during the 2008 monitoring period from 8.67mt in 2007 to 13.47mt. This increase is largely due to the granting of permission at three sites for the extraction of a total of 6.27mt, further details are recorded in Appendix B.

8.23 The landbank for land won sand and gravel as at 31st December 2008 is 19.24 years. The landbank has increased by 6.84 years, from 12.4 years as at 31st December 2007. This is again due to permissions being granted for the extraction of 6.27mt.

Construction Activity

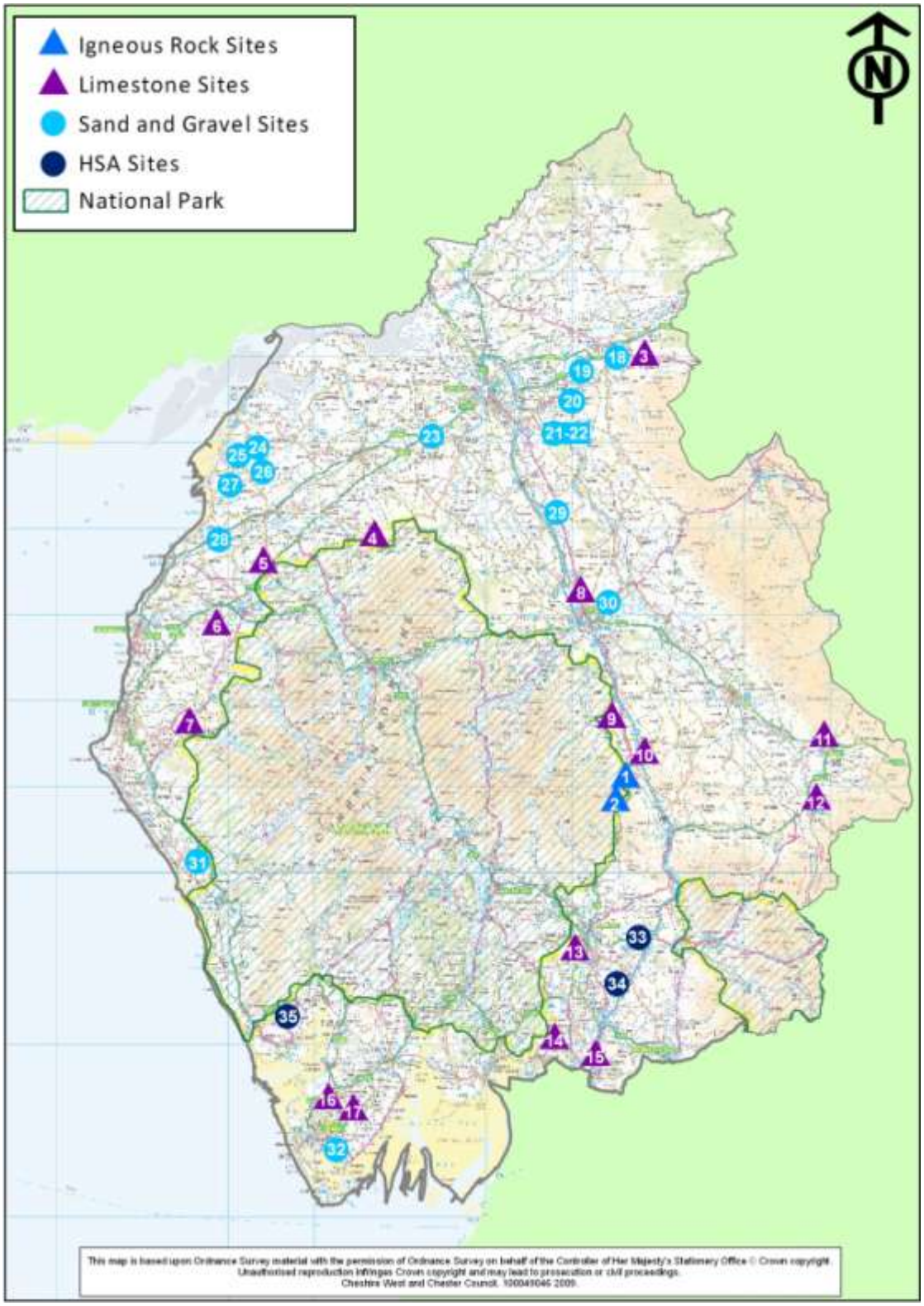
8.24 During the 2008 monitoring period several road projects were completed (High/Low Newton, Temple Sowerby and Distington By-passes). Work also commenced on Vault 9 storage facility at Low Level Waste Repository Limited, a development that will provide 100,000m^3 of storage capacity for nuclear waste.

Table 18: Cumbria sites included in AM2008 aggregate monitoring survey

▲ Igneous Rock Sites					
N°	**Site Name**	**Grid Reference**	**Operator**	**Aggregate Type**	**Status**
1	Shap Blue	NY 564 106	CEMEX RMC (UK) Ltd	Igneous Rock	Active
2	Shap Pink Quarry	NY 555 084	CEMEX RMC (UK) Ltd	Igneous Rock	Inactive
▲ Limestone Sites					
N°	**Site Name**	**Grid Reference**	**Operator**	**Aggregate Type**	**Status**
3	Silvertop Quarry	NY 586 602	W & M Thomspon (Quarries) Limited	Limestone	Active
4	Snowhill Quarry	SD 280 387	Mr M Smallwood	Limestone	Inactive
5	Moota Quarry	NY 148 361	CEMEX RMC (UK) Ltd	Limestone	Active
6	Tendley Quarry	NY 088 288	Tendley Quarries Ltd	Limestone	Active
7	Eskett & Rowrah	NY 054 167	Aggregate Industries UK	Limestone	Active
8	Flusco	NY 464 293	Lakeland Minerals Ltd	Limestone	Inactive
9	Shap Beck	NY 550 181	Hanson Quarry Products Europe Ltd	Limestone	Active
10	Shapfell	NY 587 138	Corus Construction and Industrial Businesses	Limestone	Active
11	Helbeck Quarry	NY 799 158	Sherburn Stone Company Ltd	Limestone	Active
12	Hartley Quarry	NY 787 083	CEMEX RMC (UK) Ltd	Limestone	Active
13	Kendal Fell Quarry	SD 502 925	Tarmac Ltd	Limestone	Inactive
14	Sandside Quarry	SD 482 807	Tarmac Ltd	Limestone	Active
15	Holme Park	SD 536 788	Aggregate Industries UK	Limestone	Active
16	Goldmire Quarry	SD 219 739	Neil Price Limited	Limestone	Active
17	Stainton Quarry	SD 246 729	Tarmac Ltd	Limestone	Active
● Sand and Gravel Sites					
N°	**Site Name**	**Grid Reference**	**Operator**	**Aggregate Type**	**Status**
18	Kirkhouse Quarry	NY 564 601	Lakeland Minerals Ltd	Sand & Gravel	Active
19	Low Gelt	NY 523 587	Hanson Quarry Products Europe Ltd	Sand & Gravel	Active
20	Faugh No 1 Sand Pit	NY 512 552	Hanson Quarry Products Europe Ltd	Sand & Gravel	Active
21	Brocklewath Farm	NY 348 551	William Roper	Sand & Gravel	Active
22	Faugh No2 Sand Pit	NY 510 548	No Details Held	Sand & Gravel	Inactive

23	Cardewmires Quarry	NY 343 505	Tarmac Ltd	Sand & Gravel	Active
24	Highfield	NY 511 252	D A Harrison	Sand & Gravel	Active
25	Overby No2 Sand Pit	NY 125 470	Thomas Armstrong Ltd	Sand & Gravel	Active
26	Aldoth Quarry	NY 146 482	D A Harrison	Sand & Gravel	Active
27	New Cowper	NY 118 458	Thomas Armstrong Ltd	Sand & Gravel	Active
28	Bullgill Sand Pit	NY 095 388	Thomas Armstrong Ltd	Sand & Gravel	Restoration
29	Low Plains	NY 490 410	Tarmac Ltd	Sand & Gravel	Active
30	Bonnie Mount Quarry	NY 548 313	JEA & SM Burne	Sand & Gravel	Active
31	Peel Place Quarry	SD 069 011	Tendley Quarries Ltd	Sand & Gravel	Active
32	Roosecote Sand Pit	SD 224 687	L & W Wilson (Endmoor)	Sand & Gravel	Active
●	**HSA Sites**				
N°	**Site Name**	**Grid Reference**	**Operator**	**Aggregate Type**	**Status**
33	Roan Edge	SD 584 926	CEMEX RMC (UK) Ltd	HSA	Active
34	Holmescales	SD 556 869	Aggregate Industries UK	HSA	Active
35	Ghyll Scaur	SD 171 828	Aggregate Industries UK	HSA	Active

Figure 15: Spatial distribution of minerals working in Cumbria 2008

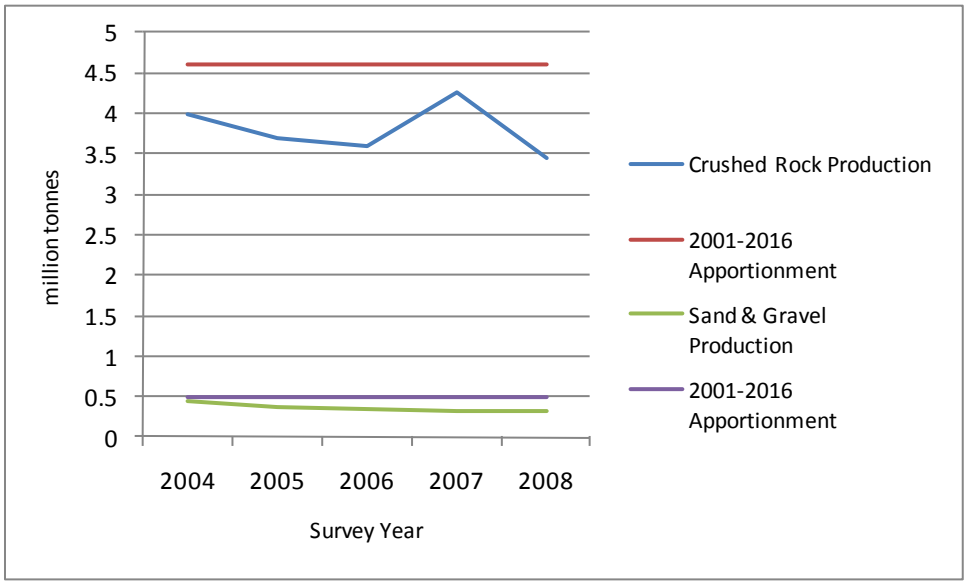


LANCASHIRE

Total aggregate sales

8.25 Table 19 illustrates total primary aggregate sales in Lancashire 1994-2008. Figure 16 illustrates primary aggregate sales in Lancashire compared to the annualised requirements as per the National and Regional Guidelines for Aggregate Provision in England 2001-2016.

Figure 16: Lancashire primary aggregate sales against annualised apportionment



8.26 Total aggregate sales in Lancashire decreased during the 2008 monitoring period by 19.7% from 4.71mt in 2007 to 3.78mt[9]. This is the lowest recorded figure for over twenty years.

Total aggregate reserves

8.27 Table 20 illustrates total primary aggregate reserves in Lancashire 1994-2008. Total aggregate reserves decreased by 11.7% from 150.9mt in 2007 to 133.25mt during 2008, but remain higher than figures recorded for 2005 when total aggregate reserves were recorded at 119.22mt. This is largely due to the reassessment of limestone reserves at one quarry which has led to a reduction of 19mt.

[9] Includes harbour authorities and marine dredged sand and gravel sales

Table 19: Monitoring of total primary aggregate sales –Lancashire sub-region 1994 – 2008 (million tonnes)

	AM94	AM95	AM96	AM97	AM98	AM99	AM00	AM01	AM02	AM03	AM04	AM05	AM06	AM07	AM08
LAND-WON SAND & GRAVEL															
Land-won Sand & Gravel	0.77	0.8	0.8	0.91	0.66	0.48	0.34	0.5	0.5	0.46	0.44	0.38	0.34	0.33	0.31
Marine Dredged Sand & Gravel	~	~	~	~	~	0.05	0.07	0.18	0.13	0.11	0.1	0.12	0.1	0.12	0.01
TOTAL SAND & GRAVEL SALES	**0.77**	**0.8**	**0.8**	**0.91**	**0.66**	**0.53**	**0.41**	**0.68**	**0.63**	**0.57**	**0.54**	**0.50**	**0.44**	**0.45**	**0.32**
CRUSHED ROCK															
Limestone[1]	4.3	3.5	2.9	3.0	2.7	2.6	2.7	2.6	2.7	2.6	2.7	2.5	2.6	3.0	2.48
Sandstone & Igneous Rock	2.7	2.8	2.63	2.17	2.1	1.8	1.7	1.9	2.2	1.6	1.3	1.2	1.0	1.26	0.98
TOTAL CRUSHED ROCK SALES	**7.0**	**6.30**	**5.53**	**5.17**	**4.80**	**4.40**	**4.40**	**4.50**	**4.90**	**4.20**	**4.00**	**3.70**	**3.60**	**4.26**	**3.46**
TOTAL AGGREGATE SALES	**7.77**	**7.10**	**6.33**	**6.08**	**5.46**	**4.93**	**4.81**	**5.18**	**5.53**	**4.77**	**4.54**	**4.20**	**4.04**	**4.71**	**3.78**

1 Excludes limestone for non-aggregate purposes

Table 20: Monitoring of total primary aggregate reserves –Lancashire sub-region 1994 – 2008 (million tonnes)

	AM94	AM95	AM96	AM97	AM98	AM99	AM00	AM01	AM02	AM03	AM04	AM05	AM06	AM07	AM08
SAND & GRAVEL															
Land-won Sand & Gravel	9.0	9.5	9.2	8.6	7.38	7.0	6.4	4.6	4.0	3.54	3.24	4.4	5.21	5.4	10.3
TOTAL SAND & GRAVEL RESERVE	**9.0**	**9.5**	**9.2**	**8.6**	**7.38**	**7.0**	**6.4**	**4.6**	**4.0**	**3.54**	**3.24**	**4.4**	**5.21**	**5.4**	**10.30**
CRUSHED ROCK															
Limestone[1]	93.3	65.9	63.8	63.5	59.4	56.8	54.1	53.9	59.3	57.5	54.7	50.32	77.0	71.4	52.6
Sandstone & Igneous Rock	151.8	125.0	112.7	105.7	86.0	84.0	73.5	71.1	70.3	68.7	79.8	64.5	75.1	74.1	70.35
TOTAL CRUSHED ROCK RESERVE	**245.1**	**190.9**	**176.5**	**169.2**	**145.4**	**140.8**	**127.6**	**125.0**	**129.6**	**126.2**	**134.5**	**114.8**	**152.1**	**145.5**	**122.95**
TOTAL AGGREGATE RESERVE	**254.1**	**200.4**	**185.7**	**177.8**	**152.78**	**147.8**	**134.0**	**129.6**	**133.6**	**129.74**	**137.74**	**119.22**	**157.34**	**150.9**	**133.25**

1 Data up to and including AM94 include reserves for non-aggregate

Crushed rock

8.28 Total crushed rock sales decreased during 2008 by 19% from 4.26mt in 2007 to 3.45mt. This is the lowest recorded sales figure for over twenty years and is 1.15mt below the annualised requirement of 4.6mt.

8.29 Sales of limestone also decreased during 2008 by 18% from 3.0mt in 2007 to 2.46mt. Again this is the lowest recorded figure for over twenty years. The economic recession has had a detrimental effect on primary aggregate sales in England and could be a reason for the downturn in sales of limestone in Lancashire.

8.30 Sales of sandstone and gritstone also decreased during 2008 in line with overall crushed rock sales by 21% from 1.26mt in 2007 to 0.99mt. As with overall crushed rock sales and sales of limestone, this is the lowest sales figure recorded for over twenty years.

8.31 Total reserves of crushed rock decreased during 2008 by 15.5% from 145.5mt to 122.95mt. This is largely due to the reassessment of limestone reserves at one quarry which has led to a reduction of 19mt. However reserves remain higher than in 2005 when a figure of 114.82mt was recorded.

8.32 Limestone reserves decreased significantly during 2008 by 26.3% from 71.4mt during 2007 to 52.6mt. The reassessment of reserves at one site has lead to this reduction in limestone reserves as stated above.

8.33 Reserves of sandstone and gritstone decreased by 5.1% during 2008 from 74.1mt in 2007 to 70.35mt. This is 2.77mt lower than would have been expected given the low levels of sales during 2008.

8.34 The landbank for crushed rock as at 31st December 2008 is 26.7 years. The landbank has decreased by 4.9 years from 31.6 years as at 31st December 2007.

Sand and gravel

8.35 Total land won sand and gravel sales decreased by 0.02mt during 2008 from 0.33mt in 2007 to 0.31mt, a fall of approximately 6%. This is also 0.19mt below the annualised requirement of 0.5mt and continues the downward turn in sales since 2005.

8.36 Reserves of sand and gravel have increased considerably by 90% during 2008 from 5.4mt in 2007 to 10.3mt. This is largely due to permission being granted for the extraction of 4.2mt of land won sand at Runshaw (Euxton) Quarry.

8.37 The landbank for sand and gravel as at 31st December 2008 is 20.6 years. The landbank has increased by 8.6 years from 12.0 years as at 31st December 2007. This increase is largely due to the release of reserves at Runshaw (Euxton) Quarry.

Construction Activity

8.38 Despite the downturn in the economy during the monitoring period some significant construction programmes have continued to progress. Construction of several large scale housing and industrial sites has continued during 2008 along with regeneration programmes in some coastal areas. East Lancashire saw substantial housing clearance and refurbishment activity supported by private sector investment. There has also been notable investment in renewable energy infrastructure including biomass and onshore wind capacity.

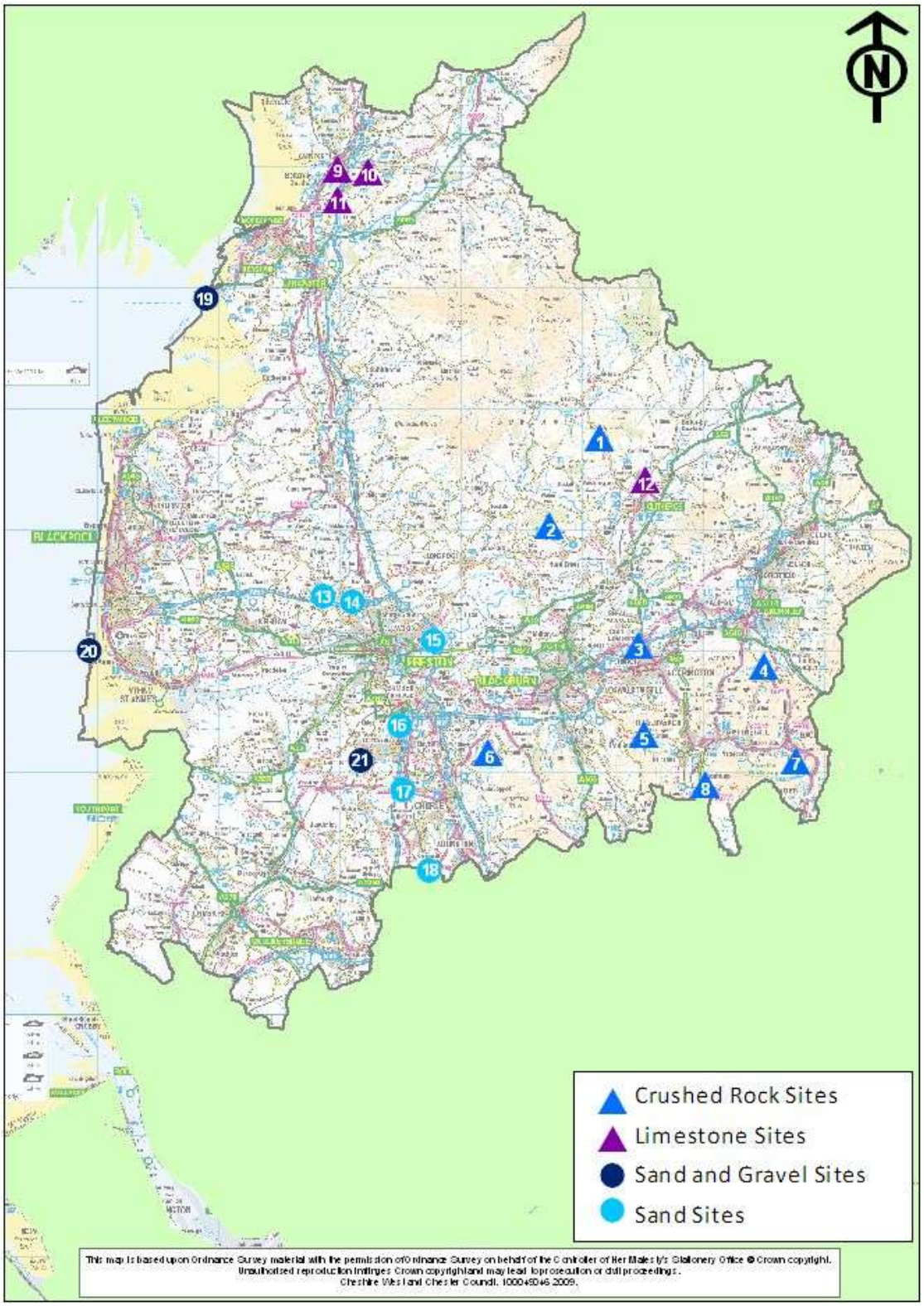
8.39 Significant development was also seen as a result of the Government funded programme Building Schools for the Future (BSF). Over 20 schools are undergoing redevelopment under the programme, including provision of 9 new purpose-built sites with a considerable construction programme during 2008.

Table 21: Lancashire sites included in AM2008 aggregate monitoring survey

▲ Crushed Rock Sites					
N°	**Site Name**	**Grid Reference**	**Operator**	**Aggregate Type**	**Status**
1	Waddington Fell	SD 717 477	Aggregate Industries UK Ltd	Sandstone and Gritstone	Active
2	Leeming	SD 683 406	Brown Bros (Longridge) Ltd	Sandstone and Gritstone	Active
3	Whinney Hill Quarry	SD 758 306	Park Royal Haulage Ltd	Sandstone and Gritstone	Active
4	Deerplay Ford	SD 758 235	Waste Recycling Group Ltd	Sandstone and Gritstone	Inactive
5	Jamestone Quarry	SD 756 233	Aggregate Industries UK Ltd	Sandstone and Gritstone	Inactive
6	Withnell Gritstone (Brinscall Quarry)	SD 634 215	Armstrongs Aggregates Ltd	Sandstone and Gritstone	Active
7	Whitworth Quarry	SD 875 203	Aggregate Industries UK Ltd	Sandstone and Gritstone	Active
8	Scout Moor	SD 815 190	Marshalls Natural Stone	Sandstone and Gritstone	Active
▲ Limestone Sites					
N°	**Site Name**	**Grid Reference**	**Operator**	**Aggregate Type**	**Status**
9	Back Lane	SD 511 693	Aggregate Industries UK Ltd	Limestone	Active
10	Leapers Wood	SD 516 694	Tarmac Ltd	Limestone	Active
11	Dunald Mill	SD 511 680	Tarmac Ltd	Limestone	Active
12	Bankfield Quarry	SD 756 437	Tarmac Ltd	Limestone	Active
● Sand and Gravel Sites					
N°	**Site Name**	**Grid Reference**	**Operator**	**Aggregate Type**	**Status**
13	Tarnacre Hall Farm (Sharples Quarry)	SD 468 426	RMC Aggregates	Sand & Gravel	Inactive
14	Bradleys Sand Pit	SD 512 340	J A Jackson Contractors (Preston) Ltd	Sand & Gravel	Active
15	Lower Brockholes	SD 578 306	Hargreaves Quarries (GB) Ltd	Sand & Gravel	Active
16	Lydiate Lane Quarry	SD 553 240	Wheale Ltd	Sand & Gravel	Active
17	German Lane	SD 562 171	P Casey Environmental Ltd	Sand & Gravel	Inactive
18	Sandons Farm	SD 592 131	Rigshaw Ltd	Sand & Gravel	Active

Sand Sites					
N°	**Site Name**	**Grid Reference**	**Operator**	**Aggregate Type**	**Status**
19	Port of Heysham	SD 400 602	Tarmac Ltd	Sand	Active
20	Foreshore St Annes	SD 295 287	William Rainford (Holdings) Ltd	Sand	Active
21	Runshaw Quarry (Euxton)	SD 540 190	Tarmac Ltd	Sand	Inactive

Figure 17: Spatial distribution of minerals working in Lancashire 2008



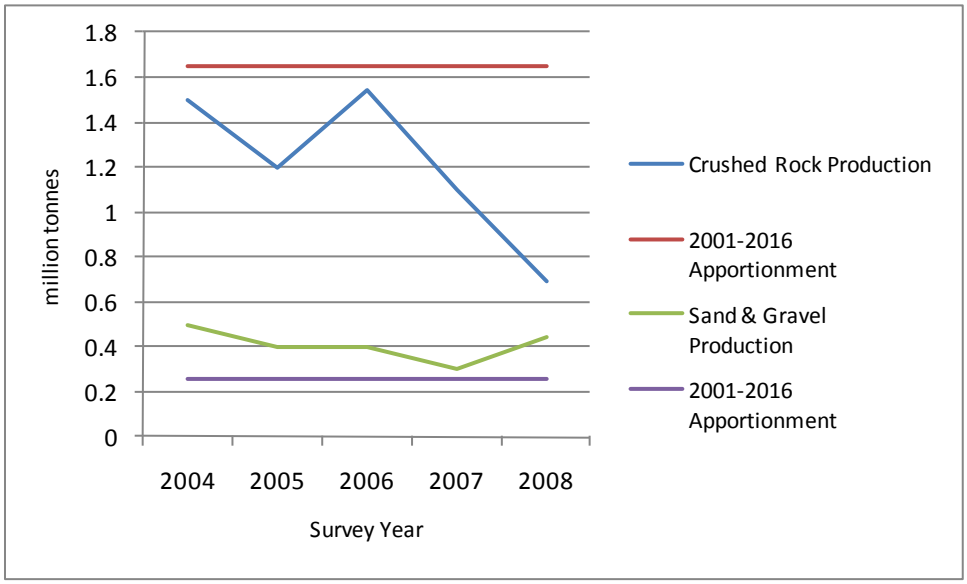
GREATER MANCHESTER (Incorporating Merseyside, Halton and Warrington)

8.40 For the purposes of RAWP annual monitoring, the areas of Greater Manchester, Merseyside, Halton and Warrington are treated as one sub-region.

Total aggregate sales

8.41 Table 22 illustrates total primary aggregate sales in Greater Manchester, Merseyside, Halton and Warrington 1994-2008. Figure 18 illustrates the primary aggregate sales in the sub-region compared to the annualised apportionment as per the National and Regional Guidelines for Aggregate Provision in England 2001-2016.

Figure 18: Greater Manchester, Merseyside, Halton and Warrington primary aggregate sales against annualised apportionment



8.42 Total aggregate sales decreased during the 2008 monitoring period by 20% from 1.93mt in 2007 to 1.54mt[10]. This is the lowest overall sales figure recorded for over twenty years and continues the downward turn in overall sales since 2007.

Total aggregate reserves

8.43 Table 23 illustrates total primary aggregate reserves in the sub-region 1994-2008. Total aggregate reserves decreased by 22.8% during 2008 from 30.01mt in 2007 to 23.16mt. This is the lowest reserve figure recorded for over twenty years and continues the downward turn in reserves since 2006.

[10] Includes harbour authorities and marine dredged sand and gravel sales

Table 22: Monitoring of total primary aggregate sales –Lancashire sub-region 1994 – 2008 (million tonnes)

	AM94	AM95	AM96	AM97	AM98	AM99	AM00	AM01	AM02	AM03	AM04	AM05	AM06	AM07	AM08
LAND-WON SAND & GRAVEL															
Land-won Sand & Gravel	0.48	0.33	0.26	0.5	0.3	0.24	0.31	0.23	0.4	0.5	0.5	0.4	0.4	0.3	0.44
Marine Dredged Sand & Gravel	0.22	0.22	0.25	0.25	0.23	0.24	0.22	0.25	0.33	0.32	0.48	0.52	0.49	0.53	0.41
TOTAL SAND & GRAVEL SALES	**0.70**	**0.55**	**0.51**	**0.75**	**0.53**	**0.48**	**0.53**	**0.48**	**0.73**	**0.82**	**0.98**	**0.92**	**0.89**	**0.83**	**0.85**
CRUSHED ROCK															
Sandstone & Igneous Rock	1.8	1.8	1.6	1.9	1.9	1.8	1.4	1.4	1.3	1.4	1.5	1.2	1.54	1.1	0.69
TOTAL CRUSHED ROCK SALES	**1.8**	**1.8**	**1.6**	**1.9**	**1.9**	**1.8**	**1.4**	**1.4**	**1.3**	**1.4**	**1.5**	**1.2**	**1.54**	**1.1**	**0.69**
TOTAL AGGREGATE SALES	**2.50**	**2.35**	**2.11**	**2.65**	**2.43**	**2.28**	**1.93**	**1.88**	**2.03**	**2.22**	**2.48**	**2.12**	**2.43**	**1.93**	**1.54**

NB Data up to and including AM98 *exclude* Halton and Warrington

Table 23: Monitoring of total primary aggregate reserves –Lancashire sub-region 1994 – 2008 (million tonnes)

	AM94	AM95	AM96	AM97	AM98	AM99	AM00	AM01	AM02	AM03	AM04	AM05	AM06	AM07	AM08
SAND & GRAVEL															
Land-won Sand & Gravel	3.2	4.1	3.8	3.5	5.36	7.67	7.1	6.7	7.7	6.7	6.3	8.91	9.89	5.15	5.8
TOTAL SAND & GRAVEL RESERVE	**3.2**	**4.1**	**3.8**	**3.5**	**5.36**	**7.67**	**7.1**	**6.7**	**7.7**	**6.7**	**6.3**	**8.91**	**9.89**	**5.15**	**5.8**
CRUSHED ROCK															
Sandstone & Igneous Rock	27.9	34.9	35.5	32.4	35.33	32.0	30.9	30.2	27.7	22.6	22.5	23.69	25.54	24.86	17.36
TOTAL CRUSHED ROCK RESERVE	**27.9**	**34.9**	**35.5**	**32.4**	**35.3**	**32.0**	**30.9**	**30.2**	**27.7**	**22.6**	**22.5**	**23.69**	**25.54**	**24.9**	**17.36**
TOTAL AGGREGATE RESERVE	**31.1**	**39.0**	**39.3**	**35.9**	**40.69**	**39.67**	**38.0**	**36.9**	**35.4**	**29.3**	**28.8**	**32.6**	**35.43**	**30.01**	**23.16**

NB Data up to and including AM98 *exclude* Halton and Warrington

Crushed Rock

8.44 Total crushed rock sales decreased during 2008 by 37% from 1.1mt in 2007 to 0.69mt, the lowest recorded crushed rock sales figure for over twenty years. This figure is also 0.96mt below the annualised requirement of 1.65mt.

4.25 Reserves of crushed rock also declined during 2008 by 30% from 24.86mt in 2007 to 17.26mt. This reserve figure is 6.91mt lower than would have been expected given the low levels of sales during 2008. This drop is largely a result of the unexpected closure of two sites and reassessment of reserves at another site resulting in a loss of 5.95mt in total.

8.45 The landbank for crushed rock as at 31st December 2008 is 10.5 years. This landbank is 4.6 years less than the 15.1 years landbank at 31st December 2007.

Sand and gravel

8.46 Sales of land won sand and gravel increased during the 2008 monitoring period by 46% from 0.3mt in 2007 to 0.44mt. This is the highest sales figure recorded since 2004 when a figure of 0.5mt was recorded. This year's figure is also 0.18mt above the annualised requirement of 0.26mt.

8.47 Reserves of sand and gravel have also increased during 2008 by 12.5% from 5.15mt in 2007 to 5.8mt. However, reserves remain dramatically below figures recorded for 2006 when reserves stood at 9.89mt. This small increase could partly be attributed to the release of 0.175mt reserve of sand at Morleys Hall Quarry.

8.48 The landbank for sand and gravel as at 31st December 2008 is 22.3 years. This landbank is 2.5 years above the 19.8 years landbank as at 31st December 2007.

Construction Activity

8.49 Major construction activity has continued in the sub-region throughout the 2008 monitoring period. The New Islington Millennium Community housing development continued to progress throughout 2008. The 12.5ha site at Ancoats, East Manchester is an ongoing project started in 2003 and is expected to continue to 2014. The project has cost £38m so far and its final building cost is expected to reach in excess of £200m.

8.50 The Gateway to the Future regeneration project for Stockport Town Centre and M60 Gateway began during 2008 with the redevelopment of the Stockport College campus and the BAM properties' office development.

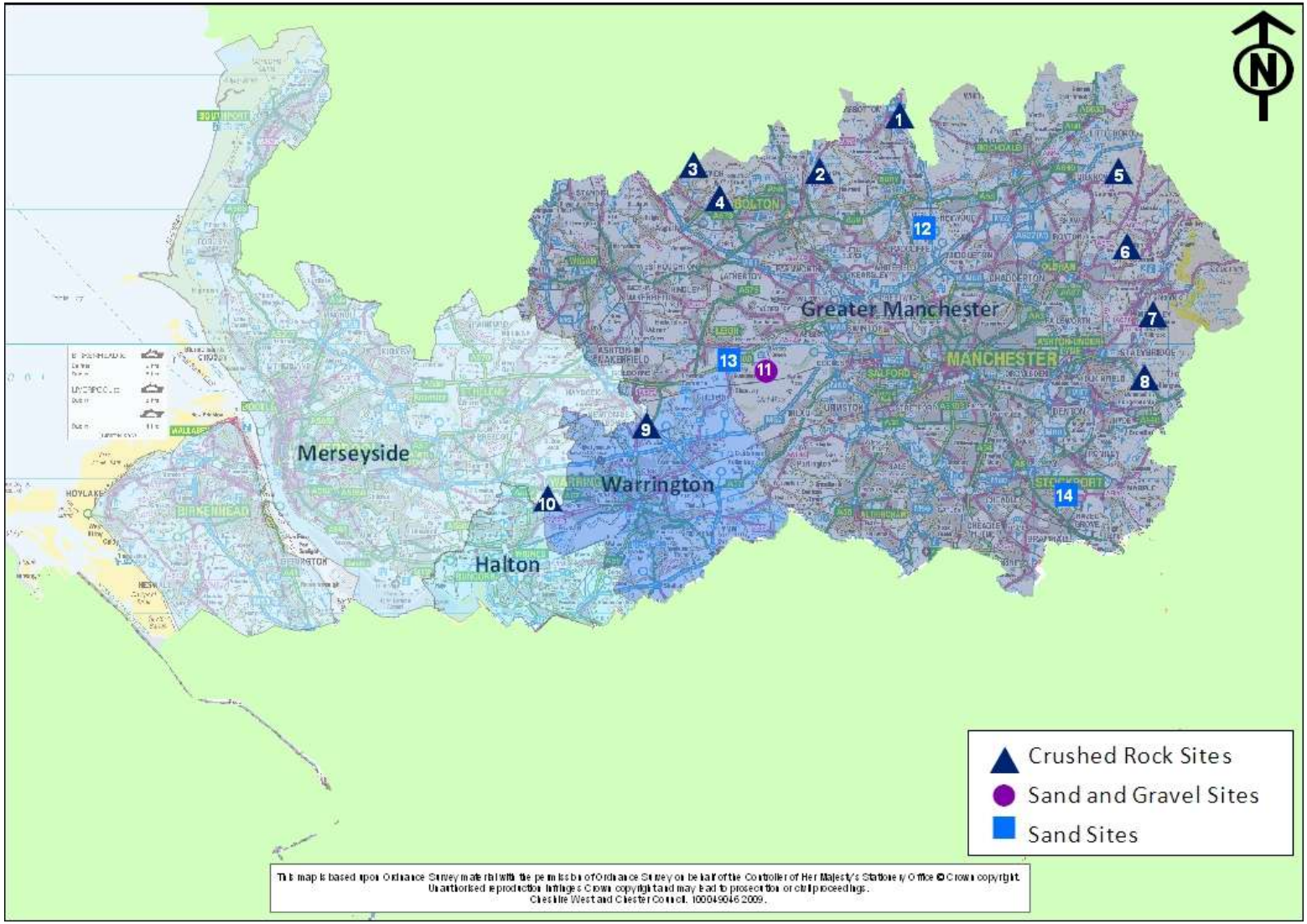
8.51 Regeneration activity also progressed throughout 2008 in Merseyside with major projects completing including the Liverpool 1 shopping development and the Mann Island mixed

use development. There were also significant road projects underway in Merseyside including the M62 and M57 junction remodelling.

Table 24: Greater Manchester, Merseyside, Halton and Warrington

▲ Crushed Rock Sites					
N°	**Site Name**	**Grid Reference**	**Operator**	**Aggregate Type**	**Status**
1	Fletcher Bank	SD 804 170	Marshalls Mono Ltd	Sandstone	Active
2	Harwood Quarry	SD 747 124	James Booth (Bolton)	Sandstone and Brickshale	Active
3	Montcliffe Quarry	SD 656 124	Hanson Quarry Products Europe Ltd	Sandstone	Active
4	Pilkington Quarry	SD 622 121	Armstrongs	Sandstone	Active
5	New Hey Quarry	SD 940 119	Brock Plc	Sandstone	Inactive
6	High Moor Quarry	SD 973 067	Veolia	Sandstone	Inactive
7	Buckton Vale Quarry	SD 922 016	Aggregate Industries UK Ltd	Sandstone	Active
8	Harrop Edge Quarry	SJ 982 959	Chartrange (Quarry Products)	Sandstone	Inactive
9	Southworth Quarry	SJ 620 940	WM Gaskell Bros (WM&C) Ltd	Sandstone	Active
10	Bold Heath Quarry	SJ 537 890	D Morgan Plc	Crushed Rock	Inactive
● Sand and Gravel Sites					
N°	**Site Name**	**Grid Reference**	**Operator**	**Aggregate Type**	**Status**
11	Astley Moss	SJ 371 500	Marshalls Mono Ltd	Sand and Gravel	Active
■ Sand Sites					
N°	**Site Name**	**Grid Reference**	**Operator**	**Aggregate Type**	**Status**
12	Pilsworth Quarry	SD 825 088	Tarmac Ltd	Sand	Active
13	Morleys Hall Quarry	SJ 687 988	Astley Sand and Aggregates Ltd	Sand	Active
14	Offerton Sand Quarry	SJ 928 893	Mrs S L Bowers	Sand	Active

Figure 19: Spatial distribution of minerals working in Greater Manchester, Merseyside, Halton and Warrington 2008



9 SECONDARY AND RECYCLED AGGREGATE

9.1 Government guidance contained within Minerals Policy Statement 1: Planning and Minerals provides for an increased emphasis on the use of secondary and recycled aggregate. Attempts at collecting sales and reserve data for secondary and recycled aggregate have been difficult and have produced vague and unreliable results. There has been a lack of response to surveys and returns received in the past have been crude estimates.

Alternative arisings

9.2 During the 2008 monitoring survey, data was gathered for the arisings of secondary aggregate during the period 1st January 2008 to 31st December 2008, across the North West region. Table 25 illustrates the findings of this survey.

Table 25: Alternative arisings in the North West 2007-2008

	AM2007	AM2008
Pulverised Fuel Ash		
Cheshire	~	~
Cumbria	~	~
Lancashire	~	~
GtManchester/Merseyside/Halton/Warrington	278,325	125,468
Total Pulverised Fuel Ash	**278,325**	**125,468**
Furnace Bottom Ash		
Cheshire	~	~
Cumbria	~	~
Lancashire	~	~
GtManchester/Merseyside/Halton/Warrington	21,482	10,910
Total Furnace Bottom Ash	**21,482**	**10,910**
Slate Waste		
Cheshire	~	~
Cumbria	226,083	290,000
Lancashire	~	~
GtManchester/Merseyside/Halton/Warrington	~	~
Total Slate Waste	**226,083**	**290,000**
Total Secondary Aggregate	**525,890**	**426,378**

9.3 The total alternative arisings decreased during the 2008 monitoring period by 19% from 525,890 tonnes to 426,378 tonnes. Total arisings of Pulverised Fuel Ash (PFA) have fallen by 55% from 278,325 tonnes in 2007 to 125,468 tonnes. Total arisings of Furnace Bottom Ash have also fallen dramatically during 2008 from 21,482 tonnes in 2007 to 10,910 tonnes, a fall of 49%. Total arisings of slate waste have increased by approximately 28% from 226,083 tonnes in 2007 to 290,000 tonnes.

9.4 The above figures could indicate a greater reliance on primary aggregate during the 2008 monitoring period or it may be attributed to the general downturn in sales of overall aggregates due to the economic recession.

Recycled Aggregate

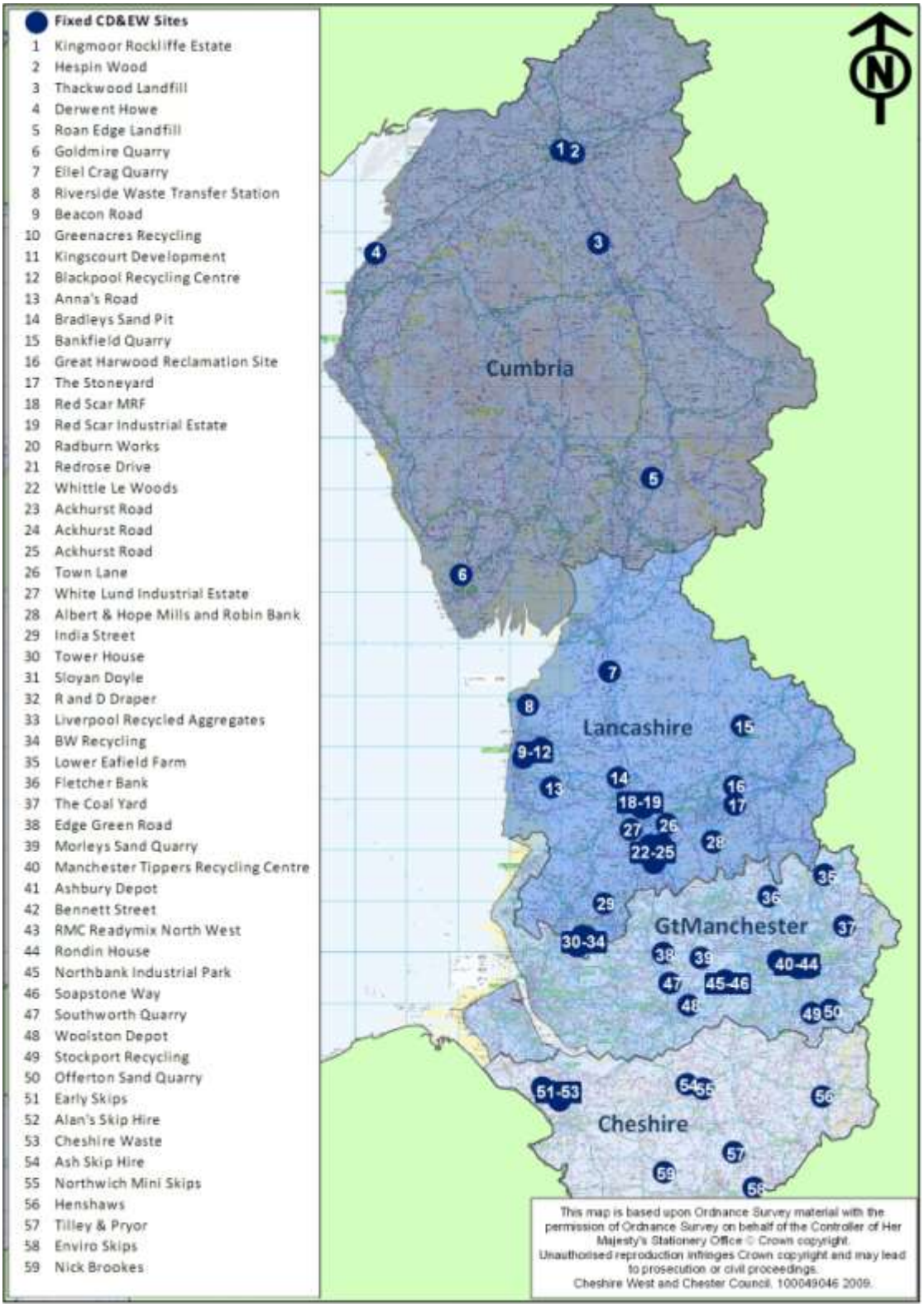
9.5 The collection of data regarding the arisings and use of recycled aggregate or construction demolition and excavation waste (CD&EW) is notoriously problematic due the very nature of the construction industry. Data previously collected has not taken account of mobile crushers and screens and it is therefore considered that wide evidence gaps have remained.

9.6 In 2006 the Regional Technical Advisory Body and the North West Counties Group commissioned a study to fill these evidence gaps for CD&EW streams in the North West region. The results of this report were discussed in detail in last year's Annual Monitoring Report.

9.7 It is considered that without provision of data being made mandatory these evidence gaps will remain and data continue to be considered unreliable.

9.8 Details of fixed permitted CD&EW operations in the North West region are included in Figure 20 and Table 26.

Figure 20: Fixed Construction Demolition and Excavation Waste (CD&EW) sites in the North West 2008



NB: For the purposes of mapping the areas of Merseyside, Halton and Warrington are included within the GtManchester sub-region

Table 26: Fixed Construction Demolition and Excavation Waste (CDEW) sites in the North West 2008

Cumbria				
N°	**Site Name**	**Location**	**Operator**	**Status**
1	Kingmoor Rockliffe Estate	Carlisle	Longtown Skip Hire	Active
2	Hespin Wood	Carlisle	Cumbria Waste Management	Active
3	Thackwood Landfill	Penrith	H & E Trotter	Active
4	Derwent Howe	Maryport	Thomas Armstrong Ltd	Active
5	Roan Edge Landfill	Kendal	L & W Wilson (Endmoor)	Active
6	Goldmire Quarry	Barrow-in-Furness	Neil Price Limited	Active
Lancashire				
7	Ellel Crag Quarry	Lancaster	Ellel Crag Recycling Ltd	Active
8	Riverside Waste Transfer Station	Fleetwood	Wyre Waste Recycling Limited	Active
9	Beacon Road	Poulton Le Fylde	Blackpool Skip Hire	Inactive
10	Greenacres Recycling	Poulton Le Fylde	Frank Smith Skip Hire	Active
11	Kingscourt Development	Poulton Le Fylde	M J Teale	Active
12	Blackpool Recycling Centre	Blackpool	Tarmac Ltd	Active
13	Anna's Road	Westby	Woods Waste Group	Active
14	Bradleys Sand Pit	Fulwood	J A Jackson Contractors (Preston) Ltd	Active
15	Bankfield Quarry	Clitheroe	Tarmac Ltd	Active
16	Great Harwood Reclamation Site	Great Harwood	S B Tippers	Active
17	The Stoneyard	Accrington	Connolly Demolition Ltd	Active
18	Red Scar MRF	Preston	Sita (Lancashire) Ltd	Active
19	Red Scar Industrial Estate	Preston	Preston Recycling Ltd	Active
20	Radburn Works	Brindle	Tarmac Ltd	Active
21	Redrose Drive	Leyland	Clive Hurt Plant Hire Ltd	Active
22	Whittle Le Woods	Whittle Le Woods	Neales Waste Management Ltd	Active
23	Ackhurst Road	Chorley	A1 Skips (Chorley)	Active
24	Ackhurst Road	Chorley	MGH Reclaim Ltd	Active
25	Ackhurst Road	Chorley	Ruttle Plant Hire Ltd	Active
26	Town Lane	Chorley	A1 Skips Ltd	Active

27	White Lund Industrial Estate	Chorley	Neales Waste Management Ltd	Active
28	Albert & Hope Mills and Robin Bank Works	Darwen	Frank Barnes (Darwen) Ltd	Active
29	India Street	Darwen	R U Recycling Ltd	Active
30	Tower House	Clitheroe	City Centre Commercials	Active
31	Sloyan Doyle	Simmonswood	Sloyan Doyle	Active
32	R and D Draper	Simmonswood	R and D Draper	Active
33	Liverpool Recycled Aggregates	Simmonswood	Liverpool Recycled Aggregates	Active
34	BW Recycling	Simonswood	BW Recycling	Active
GtManchester/Merseyside/Halton/Warrington				
35	Lower Eafield Farm	Rochdale	Mayer Brothers	Active
36	Fletcher Bank	Bury	Marshalls Mono Ltd	Active
37	The Coal Yard	Oldham	Holroyds	Active
38	Edge Green Road	Wigan	Hanson Quarry Products Europe Ltd	Active
39	Morleys Sand Quarry	Tyldesley	Astley Sand and Aggregates Ltd	Active
40	Manchester Tippers Recycling Centre	Salford	Manchester Tippers and Aggregates Ltd	Active
41	Ashbury Depot	West Gorton	Lafarge Aggregates Ltd	Active
42	Bennett Street	West Gorton	M & A Demolition (UK) Ltd	Active
43	RMC Readymix North West	West Gorton	RMC Readymix Ltd	Active
44	Rondin House	Manchester	P McGuiness & Co Ltd	Active
45	Northbank Industrial Park	Salford	Frank O'Gara & Sons Ltd	Active
46	Soapstone Way	Salford	W Maher & Sons Ltd	Active
47	Southworth Quarry	Winwick	Gaskell Brothers	Active
48	Woolston Depot	Woolston	W Maher & Sons Ltd	Yet to commence
49	Stockport Recycling	Stockport	Tarmac Ltd	Active
50	Offerton Sand Quarry	Offerton	Offerton Sand & Gravel Ltd	Active
Cheshire				
51	Early Skips	Capenhurst	Early Skips Ltd	Active
52	Alan's Skip Hire	Dunkirk	Alan's Skip Hire	Active
53	Cheshire Waste	Backford	Cheshire Waste & Skip Hire Limited	Active
54	Ash Skip Hire	Winnington	Ash Skip Hire Limited	Active
55	Northwich Mini Skips	Rudheath	Northwich Mini Skips	Active

56	Henshaws	Macclesfield	Henshaws Envirocare	Active
57	Tilley & Pryor	Sandbach	Tilley & Pryor Skip Hire	Active
58	Enviro Skips	Radway Green	Enviro Skip Hire	Active
59	Nick Brookes	Wardle	Nick Brookes Waste Disposal & Demolition	Active

10 MONITORING OF DEVELOPMENT PLANS

10.1 There was continued progress in the development of Core Strategies during the 2008 monitoring period. The current status of all LDFs are included in Appendix C.

10.2 The status of current Minerals Local Plans are as follows

- Cheshire Replacement Minerals Local Plan was adopted in June 1999, policies were saved in 2007
- Cumbria Minerals & Waste Local Plan was adopted in June 2000
- Lancashire Minerals & Waste Local Plan was adopted in December 2001

11 ENVIRONMENT ACT 1995: REVIEW OF AGGREGATE MINERAL PLANNING PERMISSIONS

11.1 The Environment Act 1995 came into force on 1st November 1995. The Act requires review of old mineral planning permissions granted prior to 22nd February 1982. The Act also requires MPAs to carry out periodic reviews of all mineral planning permissions.

11.2 Sites were put into three categories under the Act i.e. Phase I, Phase II and Dormant Sites. Phase I sites are those sites where permission was granted after 30th June 1948 but before 1st April 1969. Sites wholly or partly within a National Park, Site of Special Scientific Interest (SSSI) or Area of Outstanding Natural Beauty (AONB) are also Phase I sites irrespective of the date of permission.

11.3 Phase II sites are those sites where permission was granted after 31st March 1969 but before 22nd February 1982. Dormant sites are those sites where no minerals development has been carried out to any substantial extent at any time in the period 22nd February 1982 to 6th June 1995.

11.4 Table 27 illustrates the numbers of sites in each category within each area of the North West region. There are no reported changes for any of these areas during the 2008 monitoring period.

Table 27: Environment Act 1995: Summary of aggregate mineral review sites.

MPA	Phase I						Phase II						Dormant		
	Original	Lapsed	Submitted but not yet determined	Determined	With SoS	In High Court Challenge	Original	Lapsed	Submitted but not yet determined	Determined	With SoS	In High Court Challenge	Original	Submitted but not yet determined	Determined
Cumbria	10	1 [1]	1	8	-	-	2	-	-	2	-	-	27	-	1
Cheshire	5	-	-	7	-	-	1	-	-	1	-	-	7	1	-
Lake District National Park	5	-	2	3	-	-	0	-	-	-	-		2	-	-
Lancashire	11	-	-	11	-	-	2	1 [1]	1	1	-	-	8	-	-
Greater Manchester/ Merseyside	10	5 [2]	1	4	-	-	1	-	-	1	-	-	18 [3]	-	1

1 Application allowed to lapse as superseded by modern planning permission
2 Permission allowed to lapse on three sites as working had finished. Permission lapsed on two sites due to failure to submit conditions by due date.
3 Position with respect to dormant sites in Greater Manchester under review. 2003 report used for dormant sites.

APPENDIX A

North West Regional Aggregate Working Party Terms of reference

1 To hold at least one RAWP meeting per year, with membership to include representatives from DCLG, the Government Office, the Regional Planning Body, MPAs, QPA, BAA and such other representatives as appropriate (e.g. NFDC, BMAPA).

2 To agree either at the first meeting of each year, or early in the year via correspondence, an agenda of RAWP business for that year.

3 To organise, in conjunction with MPAs, an Annual Monitoring (AM) survey to monitor (subject to confidentiality) the sales and reserves of primary aggregates in the region, imports to it and exports from it by sea or rail (including marine aggregates).

4 To support the National Aggregate Minerals surveys, which include all inter-regional movements of aggregate, in years when such surveys are carried out.

5 To produce, supply to the RPB and publish on the DCLG website an Annual Monitoring Report (AMR) containing core information to inform stakeholders in a consistent manner of the findings from the AM survey.

6 To give technical advice to DCLG, NCG, the RPB and MPAs on:
a) demand for and supply of aggregates in the region (including alternatives, marine aggregates and imports).
b) trends in supply in the medium to longer term, including aggregate imports and exports.

7 To give technical advice to the RPB and MPAs on:
a) sub-regional apportionment of land-won aggregates, and, where undertaken,
b) regional apportionment of provision for recycling sites for CDEW.

8 To liaise with the Regional Technical Advisory Body (RTAB) to co-ordinate monitoring and technical advice on aggregates and waste management, and other RAWPs on the inter-regional movement of aggregate.

APPENDIX B

Table A: Monitoring of aggregate mineral primary planning applications decisions made 1st January 2008 – 31st December 2008

MPA	Site Name	Location & Grid Reference	Applicant / Operator	Application Number	Date Submitted	Mineral / Type of Working	Area of Application (ha)	Quantity of Minerals	Decision / Date Issued
Cheshire County Council	Arclid Quarry	378 300 361 400	Bathgate Silica Sand	8/07/0222/CPO	14/02/2007	Silica Sand	8.7ha	900,000 tonnes	Approved 24/10/2008
Cumbria County Council	Brisco Brickworks	NY4252	Esk Building Products	1/07/9026	03/12/2007	Sand	7ha	270,000 tonnes	Approved 29/07/2008
Cumbria County Council	High House Quarry	NY1348	D A Harrison	2/06/9017	20/07/2006	Sand and Gravel	19.6ha	1.5mt	Approved 29/08/2008
Cumbria County Council	Overby Quarry	NY1247	Thomas Armstrong (Holdings) Ltd	2/06/9033	12/12/2006	Sand and Gravel	37ha	4.5mt	Approved 11/09/2008
Cumbria County Council	Tendley Quarry	NY0828NE	Tendley Quarries Ltd	2/03/9034	07/10/2003	Limestone	72.6ha	8.2mt	Approved 19/11/2008
Greater Manchester	Morleys Hall	SJ 687 988	Astley Sand & Aggregates Ltd	A/08/70564	16/01/2008	Sand and Clay	3.6ha Extension	175,000 tonnes	Approved 08/12/2008
Lancashire County Council	Runshaw (Euxton)	540 190	Tarmac Ltd	9/05/319	23/03/2005	Sand	68ha	4.2mt	Approved 08/2008

No aggregate mineral primary planning decisions made in Merseyside or Warrington during the 2008 monitoring period.

NB: Aggregate mineral primary planning decisions do not include applications for extension of time, variation of conditions etc, only applications for the release of mineral reserves are included within this information

Table B: Monitoring of aggregate mineral primary planning applications in hand as at 31st December 2008

MPA	Site Name	Location & Grid Reference	Applicant / Operator	Application Number	Date Submitted	Mineral / Type of Working	Area of Application (ha)	Quantity of Minerals
Cheshire County Council	Bent Farm Quarry	383 000 362 000	WBB Minerals	8/08/0375/CPO	03/03/2008	Silica Sand	73.30ha	3mt
Cumbria County Council	Shapfell Quarry	NY5914SW	Corus UK Ltd	3/08/9020	01/12/2008	Limestone	30ha	5.2mt
Greater Manchester	Pilkington Quarry	SD 622 121	Armstrongs	80931/08	10/09/2008	Sand and Sandstone	11.3ha	1.4mt
Greater Manchester	Harrop Edge	SD 982 959	Chartrange (Quarry Products)	K00029/02	17/12/2001	Gritstone	5.8ha	0.4mt
Lancashire County Council	Bradleys Sandpit	509 340	JA Jackson Contractors Ltd	6/07/1197	24/10/2007	Sand	12.4ha	760,000 tonnes
Merseyside	Bold Heath Quarry	SJ537 890	D Morgan Plc	P/2008/0914	29/08/2008	Crushed Rock	40ha	1.06mt

NB: Aggregate mineral primary planning decisions do not include applications for extension of time, variation of conditions etc, only applications for the release of mineral reserves are included within this information

APPENDIX C

Development plans in the North West region – Current progress on preparation and review

Authority		UDP / Minerals Local Plan Position	LDF Position		
			Local Development Scheme	Statement of Community Involvement	Core Strategy/ Development Plan Document's
Cheshire	Cheshire County Council	Replacement Minerals Local Plan adopted 1999 - Policies saved 2007	Adopted March 2007	Adopted October 2006	All Minerals Local Plan policies saved 2007. No further Core Strategy work due to LGR.
	Cheshire West and Chester Council (Post April 2009)	CCC Minerals Local Plan saved 2007	Adopted 2nd March 2009	Adopted 23rd July 2009	Core Strategy Issues and Options November 2009.
	Cheshire East Council (Post April 2009)	CCC Minerals Local Plan saved 2007	Adopted 18th February 2009	Consultation November 2009	Due for adoption November 2010.
Cumbria	Cumbria	Cumbria Minerals Local Plan adopted June 2000	Adopted March 2009	Adopted January 2006	Core Strategy and generic Development Control Policies adopted 23rd April 2009. Site Allocations Policies and Proposals Map to be submitted March/April 2010.
	Lake District Authority	Lake District Local Plan adopted 1998	Adopted March 2005	Adopted June 2006	Pre-submission consultation November 2009.

Lancashire	Blackburn with Darwen	Adopted 2002	Adopted 2007	Adopted August 2006	Core Strategy due for adoption 2009.
	Blackpool	Adopted June 2006	Adopted March 2007	Adopted June 2007	Due for adoption July 2010.
	Lancashire County Council	Minerals Local Plan adopted 2001	Adopted April 2007	Adopted May 2006	Core Strategy adopted February 2009 Minerals and Waste Site Allocations and Development Management DPDs Consultation scheduled for November 2009.
Greater Manchester, Merseyside, Halton and Warrington	Bolton	Replacement UDP adopted April 2005	Adopted December 2006	Adopted March 2007	Core Strategy Preferred Options Due for adoption December 2010
	Bury	Current UDP adopted August 1997. Review abandoned for preparation of LDF	Adopted March 2007	Adopted March 2006	Core Strategy Preferred Options Due for adoption February 2011.
	Halton	UDP adopted April 2005	Adopted March 2007 Revised March 2009	Adopted July 2006	Due for submission December 2010.
	Knowsley	UDP adopted June 2006	Adopted March 2007 Revised March 2009	Adopted May 2007	Preferred Options consultation scheduled for February 2010.

Greater Manchester, Merseyside, Halton and Warrington	Liverpool	UDP adopted 2002	Adopted April 2005 Most recent revision July 2009	Adopted July 2007	Core Strategy Second Preferred Options consultation November 2009.
	Manchester	Current UDP adopted 1995 - Partial Reviews Adopted	Series of alterations have been adopted between 1998-2004	Adopted January 2007	Refining Options. Core Strategy due for adoption October 2010
	Oldham	Replacement UDP adopted July 2006	Adopted March 2007	Adopted April 2007	Preferred Options. Due for adoption October 2011.
	Rochdale	Replacement UDP adopted June 2006	Adopted March 2007	Adopted December 2007	Preferred Options. Due for adoption February 2011.
	Salford	Replacement UDP adopted May 2006	Approved June 2007	Adopted March 2008	Preferred Options. Due for adoption January 2011.
	Sefton	Replacement UDP adopted June 2006	Adopted 2009 after revision	Adopted October 2006	Core Strategy Preferred Options consultation November 2009.
	St Helens	Review of UDP abandoned to proceed with preparation of LDF	Adopted April 2005 Most recent revision April 2007	Adopted January 2007	Core Strategy Pre-Submission Spring 2010.

Greater Manchester, Merseyside, Halton and Warrington	Stockport	Replacement UDP adopted May 2006	Adopted March 2007	Adopted July 2006	Preferred Options. Due for adoption September 2010.
	Tameside	Replacement UDP adopted November 2004	Adopted April 2007	Adopted July 2006	Issues and Options. Core Strategy due for adoption September 2010.
	Trafford	Replacement UDP adopted June 2006	Adopted March 2007	Adopted July 2006	Preferred Options. Core Strategy due for adoption January 2011.
	Warrington	UDP adopted January 2006	Adopted March 2007	Adopted March 2006	Core Strategy due for adoption 2010.
	Wigan	Replacement UDP adopted April 2006	Adopted February 2007	Adopted July 2006	Preferred Options. Core Strategy due for adoption July 2010.
	Wirral	UDP adopted 2000	Adopted July 2007	Adopted December 2006	Core Strategy Issues and Options consultation October 2009.

APPENDIX D

Historical monitoring statistics 1989-2008

Table A: Monitoring of Crushed Rock Sales – North West Region 1989 – 2008 (million tonnes)

	AM1989	AM1990	AM1991	AM1992	AM1993	AM1994	AM1995	AM1996	AM1997	AM1998	AM1999	AM2000	AM2001	AM2002	AM2003	AM2004	AM2005	AM2006	AM2007	AM2008
LIMESTONE [1]																				
Cumbria [2]	4.4	4.3	3.8	4.2	4.1	4.8	3.8	3.2	3.5	3.2	3.4	3.4	3.0	2.9	2.6	2.8	2.6	2.7	2.8	2.7
Lancashire	3.4	3.6	3.5	3.8	3.7	4.3	3.5	2.9	3.0	2.7	2.6	2.7	2.6	2.7	2.6	2.7	2.5	2.6	3.0	2.46
TOTAL LIMESTONE	7.8	7.9	7.3	8.0	7.8	9.1	7.3	6.1	6.5	5.9	6.0	6.1	5.6	5.6	5.2	5.5	5.1	5.3	5.8	5.16
SANDSTONE & IGNEOUS ROCK																				
Cumbria [2]	0.6	0.6	0.6	0.7	0.6	0.8	0.8	0.7	0.7	0.8	0.8	1.0	1.1	1.1	1.1	1.1	0.36	0.27	0.53	0.4
Cumbria – High Specification Aggregate (HSA)	~	~	~	~	~	~	~	~	~	~	~	~	~	~	~	~	0.74	0.69	0.7	0.75
Lancashire	1.9	1.5	1.8	1.6	2.3	2.7	2.8	2.63	2.17	2.1	1.8	1.7	1.9	2.2	1.6	1.3	1.2	1.0	1.26	0.99
Cheshire [3/4]	0.7	0.6	0.3	0.3	0.6	1.0	0.6	0.44	0.29	0.1	0.1	0.1	0.1	0.01	0.02	0.05	0.03	0.05	0.03	0.02
GtManchester/M'side/Halton/Warrington [5]	1.5	1.4	1.4	1.6	2.0	1.8	1.8	1.6	1.9	1.9	1.8	1.4	1.4	1.3	1.4	1.5	1.2	1.54	1.1	0.69
TOTAL SANDSTONE & IGNEOUS ROCK	4.7	4.1	4.1	4.2	5.5	6.3	6.0	5.37	5.06	4.9	4.58	4.2	4.5	4.6	4.12	3.95	3.53	3.55	3.62	2.85
TOTAL CRUSHED ROCK SALES	12.5	12.0	11.4	12.2	13.3	15.4	13.3	11.47	11.56	10.8	10.58	10.3	10.1	10.2	9.32	9.45	8.63	8.85	9.42	8.01

1 Excludes Limestone used for non-aggregate purposes
2 Cumbria figures include the Lake District National Park
3 Prior to 1999 figures include Peak Park within Cheshire
4 Prior to 1998 figures *include* Halton and Warrington
5 Prior to 1998 figures *exclude* Halton and Warrington
NB: Figures may include some estimates by MPAs, total may not add up due to rounding.

Table B: Monitoring of Sand and Gravel Sales – North West Region 1989 – 2008 (million tonnes)

	AM1989	AM1990	AM1991	AM1992	AM1993	AM1994	AM1995	AM1996	AM1997	AM1998	AM1999	AM2000	AM2001	AM2002	AM2003	AM2004	AM2005	AM2006	AM2007	AM2008
LAND-WON SAND & GRAVEL																				
Cumbria [1]	1.0	0.9	0.9	0.8	0.9	1.1	0.9	0.8	0.8	0.9	0.9	0.8	0.7	0.9	1.0	0.8	0.7	0.79	0.87	0.77
Lancashire	0.95	0.81	0.78	0.8	0.8	0.77	0.8	0.8	0.91	0.66	0.48	0.34	0.5	0.5	0.46	0.44	0.38	0.34	0.33	0.31
Cheshire [2/3]	2.5	2.84	2.8	2.6	2.6	3.2	2.9	2.65	2.56	2.3	2.48	2.33	1.7	1.4	1.4	1.1	1.58	1.44	1.51	1.17
GtManchester/M'side/Halton/Warrington [4]	0.9	0.83	0.8	0.7	0.28	0.48	0.33	0.26	0.5	0.3	0.24	0.31	0.23	0.4	0.5	0.5	0.4	0.4	0.3	0.44
TOTAL LAND-WON SAND & GRAVEL	5.3	5.38	5.28	4.9	4.58	5.55	4.93	4.51	4.72	4.16	4.1	3.78	3.1	3.2	3.36	2.84	3.06	2.97	3.0	2.69
MARINE DREDGED SAND & GRAVEL [5]																				
Cumbria	~	~	~	~	~	~	~	~	~	~	~	~	0.03	0.04	0.04	0.02	0.02	0.02	0.01	0.02
Lancashire	~	~	~	~	~	~	~	~	~	~	0.05	0.07	0.18	0.13	0.11	0.1	0.12	0.1	0.12	0.01
GtManchester/M'side/Halton/Warrington [4]	~	~	~	~	0.22	0.22	0.22	0.25	0.25	0.23	0.24	0.22	0.25	0.33	0.32	0.48	0.52	0.49	0.53	0.41
TOTAL MARINE DREDGES SAND & GRAVEL					0.22	0.22	0.22	0.25	0.25	0.23	0.29	0.29	0.46	0.5	0.47	0.6	0.66	0.64	0.66	0.44
HARBOUR AUTHORITIES SAND & GRAVEL																				
Cumbria	~	~	~	~	~	~	~	~	~	~	~	~	~	0.1	0.03	~	~	0.02	~	0.02
TOTAL SAND & GRAVEL SALES	5.3	5.38	5.28	4.9	4.8	5.77	5.15	4.76	4.97	4.39	4.34	4.07	3.56	3.8	3.86	3.44	3.72	3.63	3.66	3.15

1 Cumbria figures include the Lake District National Park
2 Prior to 1999 figures include Peak Park within Cheshire
3 Prior to 1998 figures *include* Halton and Warrington
4 Prior to 1998 figures *exclude* Halton and Warrington
5 Prior to 1994 marine dredged sand and gravel figures incorporated with total land-won sand and gravel.
NB: Figures may include some estimates by MPAs, total may not add up due to rounding. Figures exclude Borrow Pits.

Table C: Monitoring of Crushed Rock Permitted Reserves – North West Region 1989 – 2008 (million tonnes)

	AM1989	AM1990	AM1991	AM1992	AM1993	AM1994	AM1995	AM1996	AM1997	AM1998	AM1999	AM2000	AM2001	AM2002	AM2003	AM2004	AM2005	AM2006	AM2007	AM2008
LIMESTONE [1]																				
Cumbria [2]	162.3	182.7	157.4	157.6	169.0	177.6	143.9	111.7	121.9	91.7[3]	111.8	116.7	106.0	102.0	99.2	96.1	97.9	97.7	102.5	110.05
Lancashire [4]	93.0	115.0	110.0	102.0	103.8	93.3	65.9	63.8	63.5	59.4	56.8	54.1	53.9	59.3	57.5	54.7	50.32	77.0	71.4	75.6
TOTAL LIMESTONE	255.3	297.7	267.4	259.6	272.8	270.9	209.5	175.5	185.4	151.1	168.6	170.8	159.9	161.3	156.7	150.8	148.22	174.7	173.9	185.65
SANDSTONE & IGNEOUS ROCK																				
Cumbria	23.9	19.3	70.6	63.4	76.1	77.1	76.3	69.6	67.7	66.8	67.5	66.5	65.0	63.0	62.0	60.9	48.85	49.2	48.69	47.75
Cumbria – (HSA)	~	~	~	~	~	~	~	~	~	~	~	~	~	~	~	~	9.85	9.55	19.0	18.2
Lancashire	53.0	67.9	43.4	73.0	146.4	151.8	125.0	112.7	105.7	86.0	84.0	73.5	71.1	70.3	68.7	79.8	64.5	75.1	74.1	65.1
Cheshire [5/6]	6.0	4.8	4.5	2.9	8.2	9.8	9.4	10.2	9.6	8.52	8.4	8.36	6.5	5.6	5.6	5.4	5.4	5.35	5.52	5.6
GtManchester/M'side Halton/Warrington [7]	36.0	33.5	36.9	33.6	35.5	27.9	34.9	35.5	32.4	35.33	32.0	30.9	30.2	27.7	22.6	22.5	23.69	25.54	24.86	17.26
TOTAL SANDSTONE & IGNEOUS ROCK	118.9	125.5	155.4	172.9	266.2	266.6	245.6	228.0	215.4	196.65	191.9	179.26	172.8	166.6	158.9	168.4	152.92	164.77	172.17	153.91
TOTAL CRUSHED ROCK RESERVES	374.2	423.2	422.8	432.5	539.0	553.7	444.4	403.5	400.8	347.75	360.5	350.06	332.7	327.9	315.6	319.4	300.51	339.47	346.07	339.56

1 Excludes Limestone used for non-aggregate purposes

2 Cumbria includes the Lake District National Park

3 Nil return recorded for one site

4 Data up to and including AM94 include reserves for non-aggregate

5 Prior to 1998 figures *include* Peak Park within Cheshire

6 Prior to 1998 figures *include* Halton and Warrington

7 Prior to 1998 figures *exclude* Halton and Warrington

NB: Figures may include some estimates by MPAs and totals may not add up due to rounding.

Table D: Monitoring of Sand and Gravel Permitted Reserves – North West Region 1989 – 2008 (million tonnes)

	AM1989	AM1990	AM1991	AM1992	AM1993	AM1994	AM1995	AM1996	AM1997	AM1998	AM1999	AM2000	AM2001	AM2002	AM2003	AM2004	AM2005	AM2006	AM2007	AM2008
LAND-WON SAND & GRAVEL																				
Cumbria [1]	9.1	8.1	17.4	18.7	17.3	15.2	14.1	12.2	13.5	12.2	12.3	11.8	12.0	12.1	11.4	10.5	9.18	9.19	8.67	7.2
Lancashire	5.2	3.8	3.6	7.0	9.4	9.0	9.5	9.2	8.6	7.38	7.0	6.4	4.6	4.0	3.54	3.24	4.4	5.21	5.4	10.3
Cheshire [2/4]	22.6	22.3	24.7	27.5	27.4	29.3	28.3	25.9	24.1	21.7	19.3	17.6	24.6	23.5	19.7	19.2	20.53	21.3	19.52	16.4
GtManchester/M'side/Halton/Warrington [3]	5.7	4.8	4.7	2.8	4.0	3.2	4.1	3.8	3.5	5.36	7.67	7.1	6.7	7.7	6.7	6.3	8.91	9.89	5.15	5.8
TOTAL LAND-WON SAND & GRAVEL RESERVES	42.6	39.0	50.4	56.1	58.1	56.7	56.7	51.1	49.7	46.64	46.27	43.2	47.9	47.3	41.34	39.24	43.02	45.59	38.74	39.7

1 Cumbria includes the Lake District National Park
2 Prior to 1998 figures *include* Halton and Warrington
3 Prior to 1998 figures *exclude* Halton and Warrington
4 Prior to 1999 figures include Peak Park within Cheshire

NB: Figures may include some estimates by MPAs and totals may not add up due to rounding. Figures exclude Borrow Pits

APPENDIX E

Minutes of meeting held on 2nd December 2008

The working party met on 2nd December 2008 to discuss the key findings from the Annual Monitoring Survey 2008 (incorporating 2007 statistics). Other matters discussed at the meeting included the implications of The Yorkshire and Humber Plan (Regional Spatial Strategy - RSS), the implications of Paragraph 70 of Mineral Policy Statement 1 (MPS1) Practice Guide regarding landbanks and Local Government Review (LGR) in Cheshire.

Annual Report 2008 (Incorporating 2007 Statistics)

Andrew Farrow presented the main findings from the Annual Report 2008. The following outcomes of the survey were discussed:

Total aggregate sales

Total aggregate sales increased in 2007 by 5% from 12.48mt in 2006 to 13.08mt in 2007. This continued the upward turn in sales from 2006.

Crushed rock sales

Sales of crushed rock increased during 2007 by approximately 6.5%, from 8.85mt in 2006 to 9.42mt in 2007, continuing the upward trend since 2005. This was below the annualised apportionment based on the National and regional guidelines for aggregate provision in England 2001-2016 (detailed in Appendix E).

Limestone sales increased by 9% from 5.3mt in 2006 to 5.8mt in 2007. Both Cumbria and Lancashire recorded increased sales for the period 2007. Sales of sandstone and igneous rock rose by 2% from 3.55mt in 2006 to 3.62mt in 2007. Cumbria and Lancashire both recorded increased sales, whilst Cheshire and G'Manchester/Merseyside/Halton/ Warrington recorded a decline in sales.

Sand and gravel sales

Overall sales of sand and gravel increased by 1% from 2.97mt in 2006 to 3.0mt in 2007. This is below the annualised apportionment figure of 3.44mt based on the National and regional guidelines for aggregate provision in England 2001-2016 (detailed in Appendix E). Sales increased in Cheshire and Cumbria, whilst sales declined in Lancashire and G'Manchester/Merseyside/Halton/Warrington during the period 2007.

Sales of marine dredged sand and gravel rose by approximately 4.1% from 0.64mt in 2006 to 0.66mt in 2007. This is still less than half the authorised extraction limit of 1.38mt per annum.

Total aggregate reserves

Total aggregate reserves decreased by 0.06% from 385.06mt in 2006 to 384.81mt in 2007. However, reserves remained higher than historically recorded in 2001.

Crushed rock reserves increased by 1.94% from 339.47mt in 2006 to 346.07mt in 2007, whilst reserves of sand gravel significantly decreased by 15% from 45.59mt in 2006 to 38.74mt in 2007. This was mainly due to the closure of the only sand and gravel operator in Merseyside.

Landbanks

Crushed rock = 33.28 years as at 31/12/2007, compared to 33.20 years as at 31/12/2006, a minimal increase of 0.08 years.

Sand and gravel = 11.29 years as at 31/12/2007, compared to 12.59 years as at 31/12/2006, a decrease of 1.3 years.

Implications of 'The Yorkshire and Humber Plan' (RSS)

Richard Evans raised 'The Yorkshire and Humber Plan: Policy ENV4' (MPAs should *'seek a progressive reduction in aggregate production from National Parks and Areas of Outstanding Beauty...'*[11]. Richard Evans expressed concerns regarding the future supply of High Specification Aggregate (HSA) in the region.

Geoff Storey stated that current permissions within the Yorkshire Dales National Park are due to expire in 2009, 2011 and 2018 and therefore there is the potential for a shortfall in the supply of HSA by 2018 if not in 2009.

Harold Collin commented that forthcoming apportionment figures from the National and regional guidelines for aggregate provision in England 2005-2020 will be affected and that this may well be the trigger for addressing the issue at a national level.

Implications of Paragraph 70 MPS1 Practice Guide (Landbanks)

Richard Evans commented that Minerals Planning Guidance (MPG) 6 provided two methods for calculating landbanks, the second of which involved using a rolling three year average. This method has now been removed under MPS1 Practice Guide and it is considered that this method was in fact the most useful of the two.

[11] The Yorkshire and Humber Plan Regional Spatial Strategy to 2026, Government Office for Yorkshire and the Humber, May 2008

Local Government Review in Cheshire

Both new shadow authorities were up and running in December 2008 with an increasing number of positions being filled in upper tiers. Both new councils struggled to get budgets in place but used rationalisation exercises to overcome certain issues.

As of April 1st 2009 Cheshire County Council and the six District Councils are to be abolished and two new Unitary authorities of Cheshire East and Cheshire West and Chester are to be created.

Andrew Farrow has now taken up a new role at Flintshire County Council and responsibility as Secretary to the North West RAWP is to be handed to Anne Mosquera, Minerals and Waste Spatial Planning Manager.

Negotiations regarding the future of joint minerals and waste working are still ongoing. Decisions relating to the Cheshire sub-region in terms of future apportionment are still to be made in the light of LGR and the formation of the two new authorities.

APPENDIX F

National and Regional Guidelines for Aggregate Provision in England 2001-2016

On 10th June 2003, the ODPM published the 'National and Regional Guidelines for Aggregate Provision in England 2001-2016'. The guidelines replace those in Annex A of Minerals Planning Guidance Note 6, published in 1994. The revised guidelines are set out below:

National and Regional Guidelines for Aggregate Provision in England 2001-2016

New Regions	Guidelines for land-won production		Assumptions		
	Land-won Sand & Gravel	Land-won Crushed Rock	Marine Sand & Gravel	Alternative Materials	Net Imports to England
South East England	212	35	120	118	85
London	19	0	53	82	6
East of England	256	8	32	110	8
East Midlands	165	523	0	95	0
West Midlands	162	93	0	88	16
South West	106	453	9	121	4
North West	55	167	4	101	50
Yorkshire and the Humber	73	220	3	128	0
North East	20	119	9	76	0
England	**1068**	**1618**	**230**	**919**	**169**

Source: National and Regional Guidelines for Aggregate Provision in England 2001-2016, ODPM, June 2003

Before the regional guidelines can be used in the preparation of minerals development plans they need to be broken down to mineral planning authority (MPA) areas. The apportionment of the regional guidelines to sub-regional areas in the North West is the responsibility of 4NW taking into account advice from MPAs and the North West RAWP.

A five-year average production level was used for the basis of the apportionment, as this best reflected recent supply patterns. The numerical implications for each MPA in terms of land-won sand and gravel and crushed rock provision, by apportioning the regional guidelines based on the above, are detailed below.

Sub-regional apportionment of aggregates provision in the North West region 2001-2016 (million tonnes)

	Sand and Gravel	Annualised Requirement
Cheshire	31.5	1.97
Cumbria	11.2	0.7
Lancashire	8.2	0.5
GtManchester/Merseyside/ Halton/Warrington	4.1	0.26
Total	**55**	**3.43**

Figures from - The North West of England Plan: Regional Spatial Strategy to 2021, Government Office for the North West of England

	Crushed Rock	Annualised Requirement
Cheshire	2.17	0.13
Cumbria	65.5	4.1
Lancashire	72.9	4.6
GtManchester/Merseyside/ Halton/Warrington	26.4	1.65
Total	**166.97**	**10.4**

Figures from - The North West of England Plan: Regional Spatial Strategy to 2021, Government Office for the North West of England

APPENIDX G

National and regional guidelines for aggregates provision in England 2005-2020

On 29th June 2009 the Department for Communities and Local Government published revised national and regional guidelines for aggregates provision in England for the period 2005 – 2020. These revised guidelines are set out below:

New Regions	Guidelines for land-won production		Assumptions		
	Land-won Sand & Gravel	Land-won Crushed Rock	Marine Sand & Gravel	Alternative Materials	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 and the Humber	78	212	5	133	3
North East	24	99	20	50	0
England	**1028**	**1492**	**259**	**993**	**136**

Source: National and regional guidelines for aggregates provision in England 2005-2020, Communities and Local Government, June 2009

The requirements for the North West region for the period 2005-2020 compared to the previous 2001-2016 guidelines are:

Aggregate Type	2001-2016 Guidelines	2005-2020 Guidelines	Difference (mt)
Land-won Sand & Gravel	55	52	-3
Land-won Crushed Rock	167	154	-13
Marine Sand & Gravel	4	15	+11
Alternative Materials	101	117	+16
Net Imports to England	50	55	+5

The revised guidelines above are yet to be apportioned to the sub-regional level.

APPENDIX H

NWRAWP Membership

North West RAWP Representatives

North West Regional Aggregates Working Party Chairman	Mr Richard Evans Minerals and Waste Planning Policy Team County Offices, Kendal Cumbria LA9 4RQ richard.evans@cumbriacc.gov.uk 01539 713425
North West Regional Aggregates Working Party Technical Secretary	Mrs Anne Mosquera Minerals and Waste Spatial Planning Manager Cheshire West and Chester Council Backford Hall, Backford Nr Chester CH1 6PX Anne.Mosquera@cheshirewestandchester.gov.uk 01244 973802
North West Regional Aggregates Working Party Technical Assistant	Mrs Natalie Durney-Knight Environmental Planning Officer Cheshire West and Chester Council Backford Hall, Backford Nr Chester CH1 6PX Natalie.Durney-Knight@cheshirewestandchester.gov.uk 01244 973117

Central and Regional Government Representatives

Department for Communities and Local Government	Mr Mark Plummer Department for Communities and Local Government Minerals and Waste Planning Zone 1/H4, Eland House, Bressenden Place, London SW1E 5DU mark.plummer@communities.gsi.gov.uk 0303 444 1708
4NW	Mr Duncan McCorquodale 4NW Wigan Investment Centre, Waterside Drive Wigan WN3 5BA duncan.mccorquodale@4nw.org.uk 01942 776729

Government Office North West	Mr Chris Bamber Government Office North West City Tower, Piccadilly Plaza Manchester M1 4BE chris.bamber@gonw.gsi.gov.uk 0161 952 4167
Highways Agency (Manchester)	Mr Ian Tull Highways Agency City Tower, Piccadilly Plaza Manchester M1 4BE ian.tull@highways.gsi.gov.uk 0161 930 5602

Local Government Representatives

Cheshire East	Mr Jamie Longmire Spatial Planning Municipal Buildings, Earl Street Crewe CW1 2BJ jamie.longmire@cheshireeast.gov.uk 01270 537461
Environmental Advisory Service (Merseyside)	Mr Paul Slinn Environmental Advisory Service Bryant House, Liverpool Road North Maghull L31 2PA paul.slinn@eas.sefton.gov.uk 0151 934 2791
GMGU	Mrs Carolyn Williams GMGU Environment, 10th Floor, Emerson House Albert Street, Eccles Manchester M30 0TE Carolyn.Williams@urbanvision.org.uk 0161 275 0311
Lancashire County Council	Mr Marcus Hudson Environment Directorate Guild House, Cross Street Preston PR1 8RD marcus.hudson@lancscc.gov.uk 01772 534272

Warrington Borough Council	Mr David Ringwood Environment and Regeneration Department New Town House, Buttermarket Street Warrington WA1 2NH DRingwood@warrington.gov.uk 01925 442814

Industry Representatives

Aggregate Industries UK Limited	Mr Geoff Storey Aggregate Industries UK Ltd High Roads, Nether Kellet, Carnforth, Lancashire LA6 1EA Geoff.Storey@aggregate.com 01524 732261
British Aggregates Association	Mr Ian Pearson Marshalls Natural Stone Division Brier Lodge, Southowram Halifax HX3 9SY Ian.pearson@marshalls.co.uk 01422 434413
British Marine Aggregate Producers Association	Mr Andrew Bellamy BMAPA UMA House, Shopwhyke Road Chichester PO20 2AD andrew.bellamy@tarmac.co.uk 01243 817200
Cemex	Mr Keith Frost Cemex Cemex House, Coldharbour Lane Thorpe, Surrey TW20 8TD keith.frost@cemex.com 01932 583450
Hanson Heidelberg Cement Group	Mr Tom Brown Hanson Aggregates Clifford House, Wetherby Business Park York Road, Wetherby West Yorkshire LS22 7NS tom.brown@hanson.biz 01937 581977

Mineral Products Association	Mr Ken Hobden Minerals Products Association Gillingham House, Gillingham Street London SW1V 1HU ken.hobden@mineralproducts.org 020 7963 8000
Sibelco UK Ltd	Mr Nick Horsley Sibelco UK Ltd Brookside Hall, Congleton Road Sandbach, Cheshire CW11 4TF 01298 768202
Tarmac Limited	Mr Grahame Fyles Tarmac Limited Tunstead House, Buxton Derbyshire SK17 8TG grahame.fyles@tarmac.co.uk 01298 768202