

# **North West Aggregates Working Party**

Annual Monitoring Report 2023

(2022 Data)

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# Acronyms

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

# Glossary

Active/Inactive -	Sites are described as active where material was produced at any time during 2022 and as inactive when the site was not in production during that period. Inactive sites include those that have been worked in the past and those that have yet to begin. The term 'inactive' replaces the term 'dormant' used in surveys prior to AM97 as the term 'dormant' acquired a more specific meaning under the terms of the Planning & Compensation Act 1991 and the Environment Act 1995.
Aggregate	Granular or particulate material which is suitable for use (on its own or with the addition of cement, lime or bituminous binder) in construction as concrete, mortar, roadstone, asphalt or drainage courses, or for use as constructional fill or railway ballast (also referred to as 'construction aggregates').
Secondary aggregates	Aggregate which originates as a waste of other quarrying and mining operations, or from industrial processes (e.g. colliery waste or minestone, blast furnace slag, power station ash, china clay waste, slate waste), but excluding chalk and clay/shale worked primarily for aggregate purposes
Landbanks	The stock of mineral reserves with valid planning permissions for their extraction but where their extraction has yet to take place. The length of the aggregate landbank is the sum in tonnes of all permitted reserves for which valid planning permissions are extant, divided by the annual rate of future demand based on the latest annual Local Aggregate Assessment. The landbank is usually calculated at a mineral planning authority level.
Local Aggregate Assessment (LAA)	An annual assessment of the demand for and supply of aggregates in a mineral planning authority's area.
LAA Annual Provision	The forecast future aggregate demand figure within a Mineral Planning Authority's LAA. This should be based on a rolling average of 10 year's sales data and other relevant local information (e.g. development growth aspirations in the MPA area).
Managed Aggregate Supply System (MASS)	This system works through national, sub-national and local partners working together to ensure a steady and adequate supply of aggregate mineral across the country

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

# Introduction

## Executive Summary

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

This Annual Monitoring (AM) report provides sales and reserve data for the calendar year 1<sup>st</sup> January – 31<sup>st</sup> December 2022.

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

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

- Cheshire East,
- Cheshire West and Chester
- Cumbria (Cumberland, Westmorland and Furness)
- Greater Manchester, Merseyside and Halton and Warrington
- Lancashire

This report includes:

- Maps showing the geographical area covered by the NWAWP; the location of quarries, wharves and rail depots and; the location of offshore aggregate production licence areas
- Sales and reserves of primary aggregates in 2022, collected from the NWAWP Annual Monitoring Survey 2023
- The landbank in the NWAWP area at 31<sup>st</sup> December 2022
- Secondary and Recycled Aggregates figures in the NWAWP
- Information on minerals plans and policies in the NWAWP area
- Information on aggregates sites and planning applications
- Information on the latest Local Aggregate Assessments prepared by the mineral planning authorities

The key findings of this Annual Monitoring Report including 2022 data is as follows:

### Land-won Sand and Gravel

- Total Land-won Sand and Gravel Sales of 1.8mt (2.01mt in 2021).
- Total Land-won Sand and Gravel Reserves of 14.86mt (18.01mt<sup>1</sup> in 2021)
- Landbank of years 6.22 years (7.76 years in 2021)
- Overall, there has been a continued decline in sand and gravel reserves since 2015, where they were at a figure of 28.63mt.

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<sup>1</sup> Following further analysis of the 2021 figures Cheshire West and Chester MPA requested that the 2021 Reserves figure be adjusted from 6 (as reported in the previous AMR) to 5.32. This changed the Total Sand and Gravel Reserves for the AWP area from 18.69 (as previously reported) to 18.01.

### **Crushed Rock**

- Total Crushed Rock Sales of 6.48mt (7.34mt in 2021)
- Total Crushed Rock Reserves of 228.91mt (227.88mt in 2021).
- Landbank of 33.13 years (33.12 years in 2021).
- There has been a slight increase in reserves due to permission to extract 1.79mt in Lancashire. Therefore, the landbank has stayed static. However, the general trend has been a continuing decline in crushed rock reserves since 2015, when the figure was of 308.54mt.

### **Landings of Marine Dredged Sand and Gravel**

- Total Marine-dredged Sand and Gravel sales 0.2mt (0.31mt in 2021).
- Total Imported marine-dredged sand and gravel removal 0.2mt.
- Total marine dredged landings in the North West 0.2mt.

### **Overall Primary Aggregates figures**

- Total primary aggregates sales 8.48mt (9.67mt in 2021).
- Total primary aggregates reserves 243.77mt (246.57mt in 2021).

A summary of key figures for 2022 are provided in Table 1 below.

As of 31 December 2022, the reserves of sand and gravel in the North West overall are below the minimum 7 year landbank (at a figure of 6.22 years) and for crushed rock above the minimum 10 year landbank (at a figure of 33.13 years). This is based on a North West combined LAA annual provision rate, in the absence of national and sub-national guidelines.

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

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

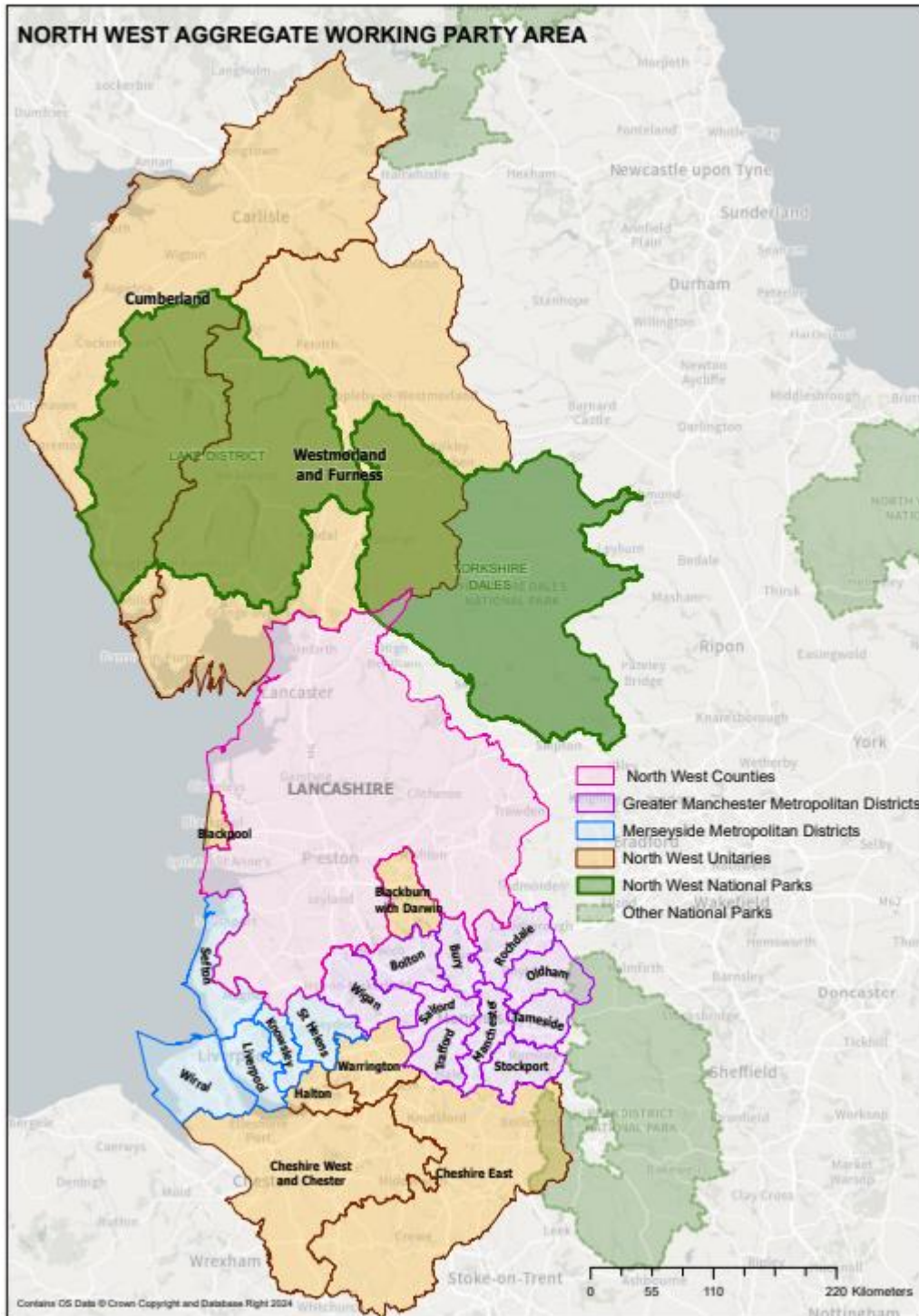


**Table 1 Dashboard key data summary**

<b>Aggregate</b>	<b>Sales in 2022 (million tonnes)</b>	<b>Change in sales from previous year</b>	<b>10 year sales average (million tonnes)</b>	<b>3 year sales average (million tonnes)</b>	<b>Sales Trend</b>	<b>LAA annual provision (million tonnes)</b>	<b>Permitted reserves at 31 December 2022 (million tonnes)</b>	<b>Change in permitted reserves from previous year</b>	<b>Landbank of permitted reserves (years)</b>	<b>Change in Landbank from previous years</b>
<i>Sand and Gravel</i>	1.8	↓	2.39	1.98	↓	2.4	14.86	↓	6.22	↓
<i>Crushed Rock</i>	6.48	↓	6.91	6.81	↓	9.89	228.91	↑	33.13	↑
<i>Marine sand and gravel</i>	0.2	↓	0.26	0.28	↓	N/A	N/A		N/A	N/A
<i>Total Primary Aggregates</i>	8.48	↓	9.33	9.46	↓	N/A	243.77	↓	N/A	N/A
<i>Recycled and Secondary Aggregates</i>	0.802	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A

# Mineral Planning Authorities in NWAWP Area

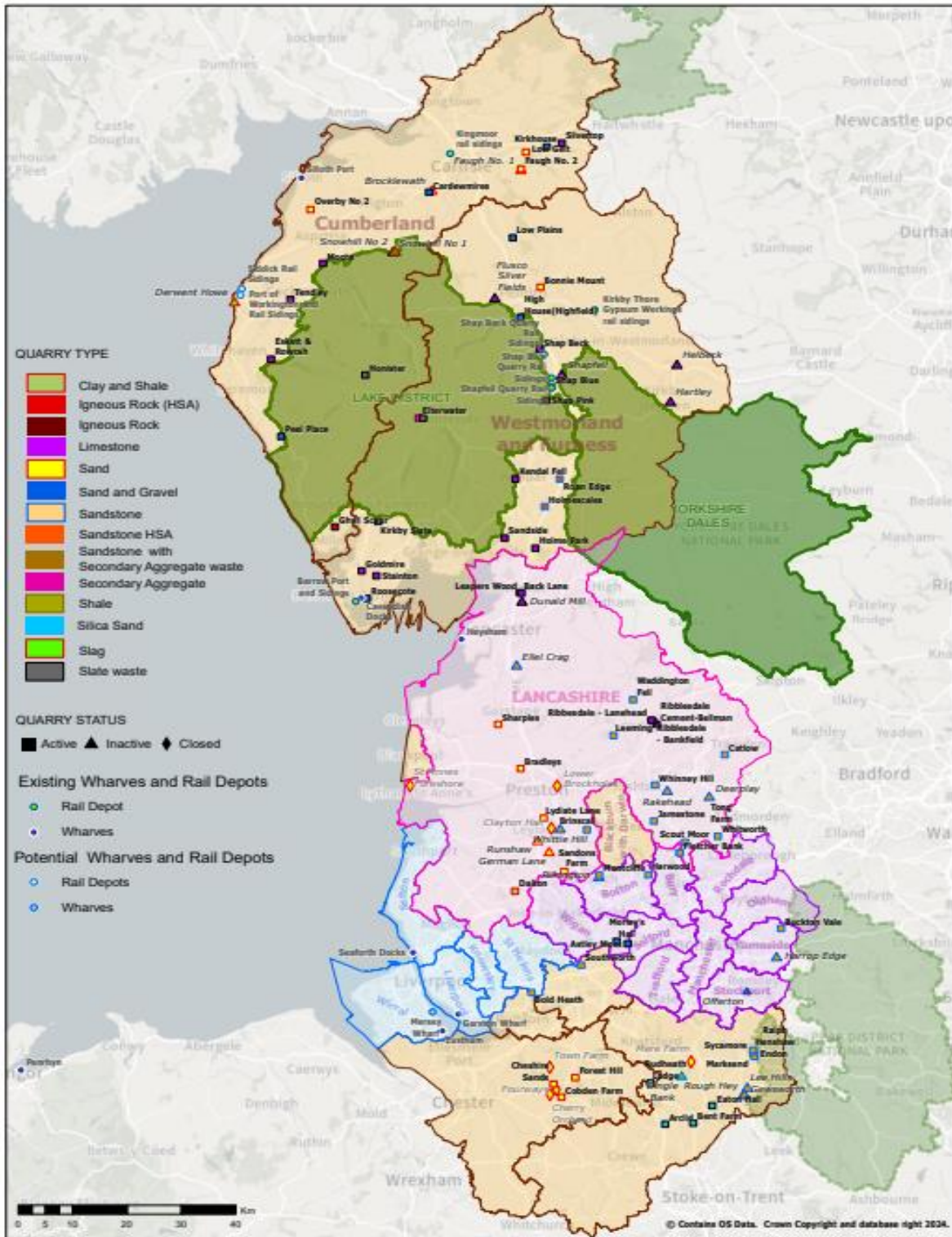
Figure 1 NWAWP Area Mineral Planning Authorities 2022



# Primary Aggregates

Location of quarries<sup>2</sup>, wharves and rail depots

Figure 2 Location of quarries, wharves and rail depots in 2022



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





# Primary Aggregates

## Sales and Imports

The sales data shown in Table 2 below has been obtained from the previous NAWWP AMRs, the AM2019 and returns received from operators during the NAWWP survey 2023 (relating to 2022 data). It should be noted however that operator returns were poor in 2022, and, all Mineral Planning Authorities had to make sales estimates. The reason for the poor returns may be due to the restrictions still being imposed during 2022 to control the COVID-19 pandemic.

The total Land-won Sand and Gravel Sales in 2022 were 1.8mt. This is a further decrease from 2021 sales figures which were also impacted by the COVID 19 pandemic and are still well below the 2019 figure of 2.55mt. Sand and gravel sales in 2022 were still below both the 10 year average and the 3 year average sales figures. All Mineral Planning Authorities except for Cumbria reported lower figures in sand and gravel sales in 2022 to 2019, indicating the industry has not recovered fully from the impacts of the pandemic. Although other factors causing slow economic growth impacting on the construction industry will also be hampering recovery for the sector.

In the case of Greater Manchester, Merseyside and Halton and Warrington, Astley Moss is the only operational sand and gravel site within the sub-region. Due to the commercial confidentiality, the sales figures for aggregate land-won sand and gravel and marine won sand and gravel have been combined for 2020, 2021 and 2022, and then a 3-year average has been applied to provide an estimate. It is acknowledged that this approach is not ideal, and concerns have been raised through the Aggregate Working Party and Duty to Cooperate discussions. However, in lieu of any other sites producing sales figures for sand and gravel, there is seemingly no other suitable alternative approach. Following a discussion by NAWWP members which included advice by industry and MPA members it was decided that since the figure is an estimate it was acceptable for it to be shown and included in the calculations for sand and gravel in the region.

The total crushed rock sales in 2022 were 6.48mt. This is a decrease from 2021 sales figures which were 7.34mt. Crushed rock sales in 2022 were marginally below the 10 year average, and the 3 year average. Crushed rock sales in Cumbria and Lancashire decreased in 2022 whilst in Greater Manchester, Merseyside and Halton and Warrington they increased in 2022.

Greater Manchester, Merseyside and Halton and Warrington reported 0.17Mt of sand and 0.27Mt of crushed HSA was imported from Glensanda super quarry in Scotland. No imported aggregate data from outside of England and Wales was collected through the NAWWP 2022 survey, and therefore there is no data on imports outside of England and Wales for the region for the year 2021 for comparison. The most comprehensive available data on imports was collected via the national AM2019<sup>3</sup>, which was undertaken by the British

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<sup>3</sup> Aggregate Minerals Survey 2019 - <https://www.gov.uk/government/publications/aggregate-minerals-survey-for-england-and-wales-2019>

Geological Survey (BGS) on behalf of the Ministry of Housing Communities and Local Government (now known as the Department of Levelling Up Homes and Communities).

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

Another National Aggregate Monitoring Survey will be undertaken in 2024 to collect the 2023 data.

**Table 2 Primary Aggregate Sales and Imports in NAWWP Area<sup>4</sup>**

	2013	2014	2015	2016	2017	2018	2019	2020	2021	2022	10 year average	3 year average
<b>Sand and Gravel</b>												
Cheshire East	0.41	0.75	0.51	0.46	0.29	0.55	0.24	0.19*	0.187	0.155	0.37	0.177
Cheshire West and Chester	0.42	0.42	0.6	0.71	0.67	0.8	0.8	0.6	0.72	0.65	0.64	0.66
Cumbria	0.48	0.68	0.71	0.81	0.79	0.71	0.77	0.75*	0.850	0.8	0.74	0.8
Greater Manchester, Merseyside & Halton & Warrington	0.24	0.26	0.31	0.26	0.26	0.34	0.34*	0.34*	0.13*	0.17	0.27	0.213
Lancashire	0.36	0.48	0.56	0.50	0.51	0.5	0.4	0.25*	0.13	0.029	0.37	0.14
<b>Total Sand and Gravel sales</b>	<b>1.91</b>	<b>2.59</b>	<b>2.69</b>	<b>2.74</b>	<b>2.52</b>	<b>2.85</b>	<b>2.55</b>	<b>2.13</b>	<b>2.02</b>	<b>1.8</b>	<b>2.39</b>	<b>1.98</b>
<b>Crushed Rock</b>												
Cheshire East	0.001	0.001	0.002	0.001	0.001	0.001	-	0.001	0.001	0	0.001	0.001
Cheshire West and Chester	-	-	-	-	-	-	-	-	-	-	-	-
Cumbria	2.4	2.58	3.3	2.89	2.61	2.82	3.01	2.59	2.86	2.66	2.77	2.70
Greater Manchester, Merseyside & Halton & Warrington	0.42	0.69	0.79	1.52	1.31	0.97	1.17	0.74	0.51*	0.451*	0.86	0.57
Lancashire	2.15	2.80	3.50	3.81	3.20	3.59	3.15	3.28	3.97	3.366	3.28	3.54
<b>Total Crushed Rock sales</b>	<b>4.97</b>	<b>6.07</b>	<b>7.59</b>	<b>8.22</b>	<b>7.12</b>	<b>7.38</b>	<b>7.33</b>	<b>6.61</b>	<b>7.34</b>	<b>6.48</b>	<b>6.91</b>	<b>6.81</b>
<b>Marine Sand and Gravel</b>												
Cumbria	0.01	0.02	0.006	0.01	0.008	-	-	-	-		0.008	0.04
Greater Manchester,	0.30	0.1	0.11 <sup>5</sup>	0.26	0.28	0.34	0.34	0.34	0.31	0.2	0.26	0.28

<sup>4</sup> Figures in this report are based on those within each Mineral Planning Authorities LAA, and therefore may differ from the figures reported in previous NAWWP AMRs.

<sup>5</sup> Figure has been adjusted in this Report to remove imported crushed rock.

\*Based on estimates

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	2013	2014	2015	2016	2017	2018	2019	2020	2021	2022	10 year average	3 year average
<b>Merseyside &amp; Halton &amp; Warrington</b>												
<b>Total Marine Sand and Gravel Sales</b>	<b>0.31</b>	<b>0.12</b>	<b>0.116</b>	<b>0.27</b>	<b>0.288</b>	<b>0.34</b>	<b>0.34</b>	<b>0.34</b>	<b>0.31</b>	<b>0.2</b>	<b>0.26</b>	<b>0.28</b>
<b>Total Aggregate Sales</b>	<b>7.19</b>	<b>8.78</b>	<b>10.39</b>	<b>11.23</b>	<b>9.93</b>	<b>10.62</b>	<b>10.22</b>	<b>9.081</b>	<b>9.43</b>	<b>8.48</b>	<b>9.32</b>	<b>8.88</b>
<b>Imports (from outside of England and Wales)</b>								0.48	0.42	0.44		
<b>Total Imports</b>								<b>0.48</b>	<b>0.42</b>	<b>0.44</b>		



## Permitted Reserves

The permitted reserves of sand and gravel and crushed rock in the NAWWP area at 31 December 2022 are set out in Table 3 below.

The permitted reserves of sand and gravel in the North West of England at 31 December 2022 were 14.86mt. This is a decrease in permitted reserves from 2021 from a figure of 18.01mt. The largest proportions of permitted reserves of sand and gravel are from quarries in Cheshire West and Chester (32%) and Cumbria (30%). As previously explained in the sales section of this report, a 3 year average has been applied to the Greater Manchester, Merseyside and Warrington and Halton sand and gravel reserve figures to maintain confidentiality.

The permitted reserves of crushed rock in the North West of England at 31 December 2022 were 228.91mt. This is an increase in permitted reserves from 2021 at a figure of 227.87mt. Greater Manchester, Merseyside and Halton and Warrington, did not have any information relating to their permitted reserves. However despite this small increase in permitted reserves the overall trend is still a decreasing reserve, 2015 was the last substantial increase in permitted crushed rock reserves. Cumbria, Greater Manchester and Lancashire have all had a decrease in crushed rock permitted reserves since 2015.

In the case of Cheshire East, the Mineral Planning Authority acknowledges there is a permitted sandstone reserve of 4.88mt, with quarries supplying small quantities of building/ornamental stone rather than crushed rock aggregate. The quarries most likely to supply crushed rock aggregate have been inactive for several years. Those active in 2019 and 2020 produced building/ornamental stone, this is therefore not reflected in Table 3 as although it is permitted it will not be used for crushed rock. The operators of crushed rock quarries do not respond to the NAWWP Annual Survey so estimates have been used for several years and in 2019 and 2020 it was felt that it was no longer appropriate to continue to rely on this as a basis for crushed rock aggregate supply. Cheshire East now forecast need on the basis of 100% imported crushed rock aggregate as evidenced in the Cheshire sub-region figures in the National AM2019.

Due to the low number of responses from Greater Manchester, Merseyside & Halton & Warrington relating to reserves for crushed rock these figures have been marked as confidential and are not included in the final figure, this is consistent with the statement on the forms sent to operators which states the figures will be treated with the strictest confidence where they cannot be collated to mask the individual figures. This does not affect the overall trend for permitted reserves as the figure involved is relatively small.

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

**Table 3 Permitted Reserves in NAWP Area<sup>6</sup>**

Aggregate	2012	2013	2014	2015	2016	2017	2018	2019	2020	2021	2022
<b>Sand &amp; Gravel</b>											
Cheshire East	5.59	5.17	0.65	0.4	0.24	3.7	2.52	2.52	2.6	2.63	1.9
Cheshire West and Chester	4.41	4.51	4.7	8	6.8	6.60	5.79	6.06	6	5.32 <sup>7</sup>	3.61
Cumbria (inc. Lake District)	10.59	9.89	9.2	8.77	7.77	7.38	7.26	6.63	6.03	5.63	4.72
Greater Manchester, Merseyside & Halton & Warrington	4.52	4.27	3.86	3.7	1.2	1.2	1.68	1.68	1.68	-	-
Lancashire (inc. Blackburn and Blackpool)	8.36	8.18	8.24	7.76	6.97	6.42	5.9	5.04	4.8	4.43	4.6
<b>Total Sand &amp; Gravel Permitted Reserves</b>	<b>33.47</b>	<b>32.02</b>	<b>26.65</b>	<b>28.63</b>	<b>22.98</b>	<b>25.30</b>	<b>23.15</b>	<b>21.93</b>	<b>21.11</b>	<b>18.01</b>	<b>14.86</b>
<b>Crushed rock</b>											
Cheshire East	4.29	4.29	4.29	4.9	4.9	4.9	4.89	0.6	0	0	0
Cheshire West and Chester	0	0	0	0	0	0					
Cumbria (inc. Lake District)	136.7	121.03	137.06	144.63	130	127.35	120.89	115.51	116.35	114.28	111.09
Greater Manchester, Merseyside & Halton & Warrington	20.06	20.3	21.18	20.43	19.59	18.37	17.5	12.42	12.05	C	C
Lancashire	132.1	130.21	120.07	138.58	135.93	131.62	128.06	153.98	119.49	113.59	117.818

<sup>6</sup> Figures in this report are based on those within each Mineral Planning Authorities LAA, and therefore may differ from the figures reported in previous NAWP AMRs.

<sup>7</sup> Following further analysis of the 2021 figures Cheshire West and Chester MPA requested that the 2021 figure be adjusted from 6 (as reported in the previous AMR) to 5.32. This changed the Total Sand and Gravel Reserves for the AWP area from 18.69 (as previously reported) to 18.01.

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<b>Total Crushed Rock Permitted Reserves</b>	<b>293.15</b>	<b>275.83</b>	<b>282.6</b>	<b>308.54</b>	<b>290.42</b>	<b>282.24</b>	<b>271.34</b>	<b>282.51</b>	<b>247.89</b>	<b>227.87*</b>	<b>228.91*</b>
<b>Total Permitted Reserves</b>	<b>326.62</b>	<b>307.85</b>	<b>309.25</b>	<b>337.17</b>	<b>313.4</b>	<b>307.544</b>	<b>294.49</b>	<b>304.44</b>	<b>269.00</b>	<b>246.56*</b>	<b>243.77*</b>

C = Confidential

\* = Does not include confidential figures or ornamental stone

## Landbank in NWAWP Area

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

As stated under paragraph 213 f) of the NPPF 2021, Mineral Planning Authorities should plan for a steady and adequate supply of aggregates by maintaining landbanks of at least 7 years for sand and gravel and at least 10 years for crushed rock.

The landbanks for permitted reserves for both sand and gravel and crushed rock in the North West of England at 31<sup>st</sup> December 2022 are shown in Table 4 below. In the absence of up-to-date national and sub-national guidelines, the landbanks have been calculated by using the LAA annual provision rate set out in the latest LAA for each Mineral Planning Authority. For the purposes of the NWAWP Annual Monitoring Reports, landbanks are calculated using the 10 year sales average. This may differ from individual Mineral Planning Authorities (MPAs) which may use the 3 year sales average or another method. Hence the landbanks stated in this report may differ from those in the individual LAAs.

The overall sand and gravel landbank for the North West of England is 6.22 years and is therefore below the minimum 7 year landbank required for sand and gravel. Therefore additional planning permissions for the extraction of sand and gravel are required urgently to ensure the North West of England maintains a steady and adequate supply of sand and gravel.

As demonstrated in Table 4, aside from Lancashire, all authorities have a sand and gravel landbank below the minimum 7 year requirement.

The overall crushed rock landbank for the North West of England is 33.13 years (and is therefore significantly above the minimum 10 year requirement). As shown by Table 4, the North West of England is significantly reliant particularly upon Cumbria and Lancashire to maintain an adequate and steady supply of crushed rock. Cheshire West and Chester does not have any crushed rock reserves. In the case of Cheshire East, there is a 4.88mt landbank of sandstone from permitted sites, however this is not likely to contribute to the supply of crushed rock aggregates as it is used to repair historic buildings<sup>8</sup>. Consequently, this AMR has recorded the crushed rock reserve in Cheshire East as nil.

There has been a clear decline in replenishment rates over the past 10 years, due to a lack of planning applications for primary aggregate extraction coming forward in the North West region. In the past 10 years there has been a fall in sand and gravel reserves by 53% and a fall in crushed rock reserves by 16.3%.

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<sup>8</sup> Table 2 – Cheshire East LAA 2021

**Table 4 Landbank in NAWP Area – at 31st December 2022**

Mineral Planning Authority	Annual rate of future demand based on the latest annual Local Aggregate Assessment	LAA Rate is 10 years sales average	Annual Rate of future demand based on 10 years sales average	Reserves (as of 31 <sup>st</sup> December 2022)	Landbank in year (as at 31 <sup>st</sup> December 2022)
<b>Sand &amp; Gravel</b>					
Cheshire East	0.155	No	0.37	1.9	<b>5.14</b>
Cheshire West and Chester	0.8	No	0.64	3.61	<b>5.64</b>
Cumbria	0.8	No	0.74	4.72	<b>6.38</b>
Greater Manchester, Merseyside and Halton and Warrington	0.17	No	0.27	0	<b>0.00</b>
Lancashire	0.029	No	0.37	4.627	<b>12.51</b>
<b>Total Sand &amp; Gravel</b>	<b>1.804</b>	<b>N/A</b>	<b>2.39</b>	<b>14.857</b>	<b>6.22 years</b>
<b>Crushed Rock</b>					
Cheshire East	0.001	No	0.001	0	0
Cheshire West and Chester	N/A	N/A	N/A	N/A	N/A
Cumbria	2.77	Yes	2.77	111.09	40.1
Greater Manchester, Merseyside and Halton and Warrington	0.451	No	0.83	0	0
Lancashire	3.366	No	3.28	117.818	35.92
<b>Total Crushed Rock</b>	<b>6.48</b>	<b>N/A</b>	<b>6.91</b>	<b>228.91</b>	<b>33.13 years</b>

## Secondary and Recycled Aggregates

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

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

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

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

**Table 5a CD&E Waste Arisings (Environment Agency, 2022<sup>9</sup>)**

Mineral Planning Authority	Amount Produced (tonnes)	Amount Managed (tonnes)
Cheshire East	358,398	332,716.89
Cheshire West and Chester	366,560.2	578,620.5
Cumbria	931,894.7	929,996.9
Greater Manchester, Merseyside and Halton and Warrington	3,136,288.93	4,241,344.3
Lancashire	1,697,887	2,027,719
<b>Total</b>	<b>6,491,028.83</b>	<b>8,110,397.588</b>

<sup>9</sup> [2022 Waste Data Interrogator - data.gov.uk](https://data.gov.uk)

## Survey Data

**Table 5b Results of NAWWP 2022 survey on sales of recycled and secondary aggregate**

<b>Mineral Planning Authority (MPA)</b>	<b>Total sales of secondary/recycled aggregate (tonnes)</b>
<b>Cheshire East and</b>	est 39,160 tonnes
<b>Cheshire West and Chester</b>	0.36 (According to Waste Data Interrogator 2021)
<b>Cumbria</b>	466,326 tonnes  (239,143 tonnes recycled aggregate and 227,183 tonnes of secondary aggregate from slate waste)
<b>Greater Manchester, Merseyside and Halton and Warrington</b>	0.403mt (based on some returns and WDI 2021)
<b>Lancashire</b>	No information received
<b>Totals</b>	1,268,486 tonnes

# Development Plans and Mineral Policies in NWAWP Area

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

**Table 6 Minerals Plans Information**

Mineral Planning Authority / Authorities	Plan Name/Mineral DPD	Preparation stage / Current Status	Status in previous annual monitoring report
<b>Cheshire East</b>	Local Plan Strategy (Strategic Policies) Part One and Site Allocations & Development Policies Document Part Two  Draft Minerals and Waste Plan	Local Plan Strategy adopted July 2017  Site Allocations and Development Management Policies adopted December 2022  <a href="https://www.cheshireeast.gov.uk/site-allocations-and-development-policies-document">Site Allocations and Development Policies Document (cheshireeast.gov.uk)</a>  <a href="#">Draft Minerals &amp; Waste Plan published for consultation Nov-Dec 2022 (Regulation 18)</a>	Site Allocations & Development Policies Document – was progressing to adoption.
<b>Cheshire West and Chester</b>	Local Plan (Part One) Strategic Policies and Local Plan (Part Two) Land allocations and Detailed Policies	Local Plan (Part one) adopted January 2015 and Local Plan (Part Two) adopted July 2019.	Both parts of the Local Plans were adopted by the time of the publication of the NWAWP AMR 2022. Both Local Plans contain mineral policies.
<b>Cumbria</b>	Cumbria Minerals and Waste Plan 2015-2030	Adopted September 2017	Adopted prior to the publication of the NWAWP AMR 2022.
<b>Lake District</b>	Local Plan 2020 to 2035	Adopted May 2021	Adopted prior to publication of the NWAWP AMR 2022.
<b>Greater Manchester</b>	Greater Manchester Joint Minerals	Adopted March 2013	Adopted prior to the publication of the NWAWP AMR 2022.



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	Development Plan		
<b>Liverpool</b>	Liverpool Local Plan 2013-2033	Adopted January 2022	The Liverpool Local Plan 2013–2033 - Liverpool City Council
<b>Halton</b>	Delivery and Allocations Local Plan	Adopted March 2022 <a href="#">DALP Adopted.pdf (halton.gov.uk)</a>	EiP Hearings took place in March 2021
<b>Knowsley</b>	Local Plan Core Strategy	Adopted 2016	Adopted 2016 – no report on a review taking place
<b>Sefton</b>	A Local Plan for Sefton	Adopted April 2017	Adopted 2017 – no report on a review taking place
<b>St. Helens</b>	St Helen's Local Plan 2020-2035	Adopted July 2022 St Helens Borough Local Plan adopted 12 July 2022 <a href="#">Microsoft Word - Local Plan Written Statement - FINAL adoption version 16.06.2022 (sthelens.gov.uk)</a>	EiP Hearings took place May-June 2021
<b>Wirral</b>	Wirral Local Plan 2020-2035	Submitted for examination on 26 October 2022	Local Plan in Examination <a href="#">Local Plan Examination   wirral.gov.uk</a> Reg 18 consultation took place January-April 2020
<b>Warrington</b>	Warrington Local Plan 2021-2038	Submitted for examination 22 April 2022 Local Plan in Examination <a href="#">Local plan examination   warrington.gov.uk</a>	Reg 19 consultation on updated proposed submission document took place October-November 2021. The Plan was in Examination during 2022.
<b>Lancashire</b>	Lancashire Minerals and Waste Local Plan	Further Regulation 19 consultation expected to take place early 2024 Intending submission to the Secretary of State for examination in 2024.	Regulation 19 consultation to take place Autumn/Winter 2019

## Aggregates sites and planning applications in NWAWP Area

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

Altogether there are 94 primary aggregate quarries in the North West of England recorded in 2020, (with 67 operational) and 3 wharves. Two wharves are located along the River Mersey and one is located at Seaforth Docks.

**Table 7** *Aggregates sites in NWAWP area*

Mineral Planning Authority	Site Name	Type of site (Wharf, rail depot, quarry etc)	Operator	Grid Reference	Mineral	Status
Cheshire East	Arclid Quarry	Quarry	Bathgate Silica Sand Ltd.	SJ 783 613	Silica Sand	O – End date 2041
	Bent Farm Quarry	Quarry	Sibelco UK	SJ 831 619	Silica Sand	O – End date 2031
	Dingle Bank Quarry	Quarry	Sibelco UK	SJ 832 714	Silica Sand	NO – end date 2020 ceased being restored
	Eaton Hall Quarry	Quarry	Tarmac Limited	SJ 860 655	Silica Sand	O – end date 2042
	Endon Quarry	Quarry	Park Skip Hire	SJ 940 763	Sandstone	O – end date 2042
	Gawsworth Quarry	Quarry	O’Gara Developments	SJ 919 679	Sandstone	NO – end date 2042
	Lee Hills Quarry	Quarry	Lee Hills Quarry	SJ 928 691	Sandstone	NO – end date 2042
	Marksend Quarry	Quarry	Earls Stone Ltd	SJ 941 757	Sandstone	O – end date 2042
	Mere Farm Quarry	Quarry	Hanson Quarry Product Europe Limited	SJ 825 746	Sand	R – extraction ceased 2014
	Ralph Henshaw	Quarry	Earls Stone Ltd	SJ 766 939	Sandstone	O – end date 2042
	Rough Hey Quarry	Quarry	O’Gara Developments	SJ 923 682	Sandstone	NO – end date 2042
	Rudheath Lodge <sup>10</sup>	Quarry	Sibelco UK	SJ 751 698	Silica Sand	O – end date 2032

<sup>10</sup> Rudheath Lodge is split between the administrative boundaries of Cheshire East & Cheshire West with planning approvals in both MPAs. Extraction has been approved between 202-2032 with a further 2 years allowed for restoration.

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	Sycamore Quarry	Quarry	Earls Stone Ltd	SJ 939 766	Sandstone	O – end date 2042
<b>Cheshire West and Chester</b>	Cherry Orchard Sand Unit	Quarry	Cherry Orchard Sand Unit	SJ 568 680	Sand	R
	Cheshire Sands (Crown Farm Quarry including Delamere Quarry)	Quarry	Tarmac Limited	SJ 572 699	Sand	O – end date 2042
	Cobden Farm	Quarry	Tarmac Limited	SJ 587 673	Sand	C – end date 2021 – being restored
	Forest Hill Quarry	Quarry	CEMEX UK Material Limited	SJ 612 714	Sand	O – end date 2027
	Fourways	Quarry	Tarmac Limited	SJ 577 690	Sand	R
	Town Farm Quarry	Quarry	P Casey Enviro Ltd.	SJ 565 735	Sand	R
	Rudheath Lodge <sup>11</sup>	Quarry	Sibelco UK	SJ 751 698	Silica Sand	O – end date 2032
	<b>Cumbria</b>	Bonnie Mount	Quarry	J. E. A and S. M Burne	NY 548 313	Sand
Brockleworth Farm		Quarry	Norbrook Laboratories	NY 348 551	Sand	NO – end date 2021
Cardewmires Quarry		Quarry	Thomas Armstrong Ltd	NY 343 505	Sand and gravel	O - end date 2025
Derwent Howe Slag Bank		Quarry	Thomas Armstrong Ltd	NX 985 285	Slag	NO – end date 2016
Elterwater Quarry (slate)		Quarry	Burlington Slate Ltd	NY 324 048	Secondary aggregate	O – end date 2042
Eskett and Rowrah Quarries		Quarry	Tendley Quarries Ltd.	NY 054 167	Limestone	O – end date 2034
Faugh No. 1 Sand Pit		Quarry	Hanson Quarry Products Europe Limited	NY 512 552	Sand	NO – end date 2024
Faugh No. 2 Sand Pit		Quarry	Eddie Wannop Limited	NY 512 552	Sand	O end date 2022
Flusco Quarry		Quarry	Lakeland Minerals Limited	NY 464 293	Limestone	NO – end date 2032
Ghyll Scour Quarry		Quarry	Aggregate Industries UK	SD 171 828	Igneous Rock (HSA)	O – end date 2045
Goldmire Quarry		Quarry	Burlington Aggregates	SD 219 739	Limestone	O – end date 2042

<sup>11</sup> Rudheath Lodge is split between the administrative boundaries of Cheshire East & Cheshire West with planning approvals in both MPAs.

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Hartley Quarry	Quarry	CEMEX RMC (UK) Ltd	NY 787 083	Limestone	NO – end date 2042
Helbeck Quarry	Quarry	Breedon Group	NY 799 158	Limestone	NO – end date 2042
High House Quarry (Highfield)	Quarry	D A Harrision	NY 511 252	Sand and gravel	O – end date 2036
Holme Park Quarry	Quarry	Aggregate Industries UK	SD 536 788	Limestone	O – end date 2043
Holmescales Quarry	Quarry	Aggregate Industries UK	SD 556 869	Sandstone (HSA)	O – end date 2042
Kendal Fell Quarry	Quarry	Mr Pennington	SD 502 925	Limestone	O – end date 2042
Kirkhouse Quarry	Quarry	Lakeland Minerals Limited	NY 564 601	Sand and gravel	O – end date 2033
Low Gelt Quarry	Quarry	Hanson Quarry Products Europe Limited	NY 512 552	Sand	O – end date 20
Low Plains	Quarry	Tarmac Limited	NY 490 410	Sand and gravel	O – end date 2033
Moota Quarry	Quarry	CEMEX RMC (UK) Ltd	NY 148 361	Limestone	O – end date 2024
Overby No. 2 Sand Pit	Quarry	Thomas Armstrong Limited	NY 125 470	Sand	O – end date 2026
Peel Place Quarry	Quarry	Tendley Quarries	SD 069 011	Sand and Gravel	O – end date 2025
Roan Edge Quarry	Quarry	CEMEX RMC (UK) Ltd	SD 584 926	Sandstone (HSA)	O – end date 2038
Roosecote Sand Pit	Quarry	Burlington Aggregates Ltd	SD 224 687	Sand and gravel	O – end date 2029
Sandside Quarry	Quarry	Tarmac Limited	SD 482 807	Limestone	O – end date 2029
Shapfell Limestone Quarry	Quarry	Tata Steel UK Limited	NY 587 138	Limestone	NO – time extension to 2036 for restoration only
Silvertop Quarry	Quarry	W & M Thompson (Quarries) Ltd	NY 586 602	Limestone	O – end date 2042
Snowhill Quarry No. 1	Quarry	Mr M Smallwood	SD 280 387	Limestone	NO – end date 2022
Snowhill Quarry No. 2	Quarry	Mr M Smallwood	SD 280 387	Sandstone with waste sold as secondary aggregate	NO - end date 2020
Stainton Quarry	Quarry	Tarmac	SD 247 729	Limestone	O – end date 2042
Tendley Quarry	Quarry	Tendley Quarries	NY 088 288	Limestone	O – end date 2029
Kirkby Slate	Quarry	Burlington Aggregates		Slate	O-

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<b>Lake District</b>	Shap Beck Quarry	Quarry	Hanson Quarry Products Europe Limited	NY 550 181	Limestone	O – end date 2042
	Shap Blue Quarry and Works	Quarry	CEMEX (UK) Ltd	NY 564 106	Igneous rock	O – end date 2038
	Shap Pink	Quarry	Armstrong Aggregates		Igneous rock	O-end date 2042
	Elterwater	Quarry	Burlington Aggregates		Slate	O- end date 2042
	Honister	Quarry	Honister Slate		Slate	O
<b>Greater Manchester - Salford City</b>	Astley Moss	Quarry	Breedon Aggregates	SJ 371 500	Sand and Gravel	O – end date 31 <sup>st</sup> Dec 2022
<b>Greater Manchester – Tameside Metropolitan Borough Council</b>	Buckton Vale Quarry	Quarry	W Maher & Sons	SJ 530 885	Sandstone	O – end date 2042
	Harrop Edge Quarry	Quarry	Chartrange (Quarry Products)	SJ 982 959	Sandstone	NO – end date 2042
<b>Greater Manchester - Bury Metropolitan Borough Council</b>	Fletcher Bank Quarry	Quarry	W Maher & Sons	SD 804 170	Sandstone	O – end date 2036
	Fletcher Bank Quarry	Quarry	PP O'Connor Ltd	SD 804 170	Sandstone	O – end date 2036
<b>Greater Manchester - Bolton Council</b>	Harwood Quarry	Quarry	Booth Ventures	SD 747 124	Sandstone	O – end date 2026
	Montcliffe Quarry	Quarry	Armstrongs Aggregates Ltd	SD 656 124	Sandstone	O – end date 2033
	Pilkington Quarry	Quarry	Armstrongs Aggregates Ltd	SD 622 121	Sandstone	NO – end date 2026
<b>Greater Manchester – Stockport Metropolitan Borough</b>	Offerton Quarry	Quarry	Offerton Sand and Gravel	SJ 928 893	Sand and Gravel	NO
<b>Greater Manchester – Wigan Metropolitan Borough</b>	Morley's Hall Quarry	Quarry	Casey	SJ 685 990	Sand and gravel	O – end date 2024
<b>Merseyside - St. Helens</b>	Bold Heath Quarry	Quarry	D Morgan Plc	SJ 530 885	Sandstone	O – end date 2025
<b>Merseyside – Liverpool City Council</b>	Garston Wharf	Wharf	Hanson Quarry Products	SJ 397 837	Sand	O – dredging

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			Europe Limited and Tarmac			license until 2024
<b>Merseyside – Wirral Metropolitan Borough Council</b>	Mersey Wharf	Wharf			Sand and gravel	NO – dredging license until 2029
<b>Merseyside – Sefton Metropolitan Borough Council</b>	Port of Liverpool (Seaforth Docks)	Docks	Aggregate Industries	SJ 323 961	Crushed rock (imports from Glensanda Quarry)	O – end date 2021
<b>Warrington Borough Council</b>	Southworth Quarry	Quarry	Gaskell Bros (WM&C) Ltd	SJ 619 940	Sandstone	O – end date 2025
<b>Lancashire County Council</b>	Ribblesdale Cement - Bellman	Quarry	Hanson	SD 761 428	Limestone	O – end date 2027
	Back Lane	Quarry	Aggregate Industries	SD 510 695	Limestone	O – end date 2048
	Leapers Wood	Quarry	Tarmac	SD 515 694	Limestone	O – end date 2048
	Ribblesdale – Bankfield	Quarry	Tarmac	SD 755 435	Limestone	O – end date 2033 subject to s106
	Ribblesdale – Lanehead	Quarry	Hanson	SD 752 437	Limestone	O – end date 2027
	Dunald Mill	Quarry	Tarmac	SD 511 679	Limestone	NO – end date 2022
	Clayton Hall	Quarry	Neales		Sand	C – end date 2028
	German Lane	Quarry	P Casey Enviro	SD 562 171	Sand	NO – end date 2042
	Lydiat Lane	Quarry	JA Jackson	SD 554 239	Sand	C – end date 2030
	St Annes Foreshore	Quarry	William Rainford	SD 313 300	Sand	C
	Bradleys	Quarry	JA Jackson	SD 512 340	Sand	O – end date 2029
	Runshaw	Quarry	Tarmac	SD 543 195	Sand	NO – end date 2027
	Sandons Farm	Quarry	Chorley Sand	SD 592 131	Sand	C – end date 2022
	Lower Brockholes	Quarry	Hargreaves	SD 578 304	Sand	C
Sharples	Quarry	Hargreaves	SD 472 428	Sand	C – end date 2028	

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	Catlow	Quarry	Greens		Sandstone	O – end date 2028
	Leeming	Quarry	Brown Bros	SD 683 406	Sandstone	O – end date 2042
	Ellel Crag	Quarry	JA Jackson		Sandstone	O – end date 2038
	Whinney Hill	Quarry	Forterra	SD 756 30	Sandstone	O – end date 2042
	Whittle Hill	Quarry	Ruttles		Sandstone	NO – end date 2042
	Brinscall	Quarry	Armstrongs	SD 633 421	Sandstone	O – end date 2042
	Waddington Fell	Quarry	Armstrongs	SD 718 479	Sandstone	O – end date 2022
	Fletcher Bank	Quarry	Marshalls		Sandstone	O – end date 2042
	Scout Moor	Quarry	Marshalls	SD 814 190	Sandstone	O – end date 2029
	Jamestone	Quarry	W Maher and Sons	SD 758 233	Sandstone	O – end date 2042
	Whitworth	Quarry	Fairhurst Stone	SD 875 202	Sandstone	O – end date
	Rakehead	Quarry	Ibstock		Sandstone	NO – end date 2042
	Deerplay	Quarry	Waste Recycling Group		Sandstone	NO – end date 2035
	Tong Farm	Quarry	Fox Brothers	SD 880 225	Shale / sandstone	O – end date 2031
	Ravenhead Quarry		Booths		Sandstone	O – end date 2042
<p>Notes:  C = confidential figure  Status: O=operational; NO=Non Operational, D=Dormant, C=Closed, R=Restored/Redeveloped</p>						

## Planning Applications

Table 8 below lists the submitted planning applications for aggregate production within the North West of England, that were either decided or pending a decision late 2021 through 2022 and early 2023. Applications that were submitted as far back as 2019 have also continue to be included where a decision is still pending. For completeness, the outcome of the decision for an application has also been included if this available, even although it is beyond the 31<sup>st</sup> December 2022 base date of this AMR.

**Table 8 Planning Applications and Decisions in NAWP Area**

Mineral Planning Authority	Site Name and Location (Grid Reference)	Operator / Applicant	Tonnage(mt) (for aggregate use)	Type of Application	Date Submitted	Decision
Cheshire East	Bent Farm Quarry	Sibelco	0.41	Application to vary conditions comprising three main elements, to extend the timeframe for mineral extraction, to allow for the extension of extraction limits (within the permitted red line boundary) and to extract to a deeper depth within a section of the quarry	26 March 2021	Approved at Planning Committee 02.02.2022 subject to conditions and deed of variation of the S106 agreement (the agreement remains unsigned)
Cheshire West and Chester	Forest Hill (21/01861/S73) - Western Extension	Cemex Ltd	18000	Variation of Conditions – including time extension	Wed 28 Apr 2021	Approved Wed 31 Aug 2022
	Crown Farm (11/04200/MIN)	Tarmac Limited	5283000	S73 21/04693/S73	Tue 23 Nov 2021	Withdrawn Mon 09 May 2022
	Crown Farm	Tarmac Limited	5.58 mt sand and gravel	Full	Fri 20 Jan 2023 23/00320/FUL	Pending



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Mineral Planning Authority	Site Name and Location (Grid Reference)	Operator / Applicant	Tonnage(mt) (for aggregate use)	Type of Application	Date Submitted	Decision
	Rudheath Lodge (17/03104/MIN) and (18/04735/FUL)	Sibelco Ltd	300,000 (for the whole site - CWaC and Cheshire East)	S73 22/02867/S73 Proposed partial removal of furnace bottom ash (FBA)	Thu 28 Jul 2022	Approved Wed 08 Feb 2023
	Land Off Cookes Lane Rudheath Northwich	Cheshire Land Ltd		S73 23/02550/S73	Mon 14 Aug 2023	Pending
<b>Cumbria</b>	Esk Quarry	Eddie Wannop Ltd.		App ref 1/20/9004. Recycling of inert waste to produce non-waste aggregate products	30/4/20	Withdrawn
	Kirkhouse Quarry			1/20/9006 and 1/20/9005 – extension to operating period for sand and gravel extraction to 2032	12.06.2020	Granted 20.01.22
	High Close Quarry	Thomas Armstrong Aggregates		ROMP	06.09.19	Decision Pending
	Lambhill Quarry	J & M Casson & Sons		Full	24.12.21	Granted 03.03.22
	West Brownrigg Quarry	Messrs Lowthian		S73	10.02.21	Granted 02.02.22
	Petts Quarry	Lonsdale Settled Estate		S73	08.12.20	Granted 03.03.22
	Snowhill Quarry No.1 2/22/9003	Snowhill Stone Ltd		S73 time extension to 2033 - mainly building stone	20.05.22	Granted 24.10.22
	Leipsic Quarry 3/22/9006	Alston Natural Stone		S73 time extension to 2037 for	19.12.22	Granted 14.03.2023

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Mineral Planning Authority	Site Name and Location (Grid Reference)	Operator / Applicant	Tonnage(mt) (for aggregate use)	Type of Application	Date Submitted	Decision
				building stone extraction		
	Land adjacent Cardewmir es Quarry 1/22/9006	Thomas Armstrong Aggregates	105,000 sand and gravel.	Full Lateral extension for sand and gravel	17.11.22	Granted 28.02.23
	Esk Quarry (Faugh 2) 1/22/9005	Eddie Wannop Ltd		Full time extension for continued sand and gravel extraction, and for recycled aggregate production	19.10.22	Granted 4.10.23
<b>Lancashire</b>	Bradleys Sand Pit	J A Jackson		Extension of time LCC/2021/00 59	03/11/2021	Granted 27/04/22
	Catlow Quarry	Greens Natural Stone Products Ltd		Time extension	23/12/2020	Granted
	Ravenhead Quarry Skelmersdale	Booth Ventures Ltd	Extension to mineral working area – 130,000m3 aggregate	LCC/2022/00 16 Extension of quarry	19/4/22	Granted 20/07/22
	Deerplay Landfill	FFC Environment		LCC/2022/00 25 Extension of time	11/05/22	Granted 20/07/22
	Lower Hall Farm, Salmesbury	Harleyford Aggregates	3Mt sand and gravel	Full	26/02/21	Pending
	St Annes Foreshore	Fylde Borough Council	150,000 tpa sand	Full application for resumption of sand winning activity	30/03/2022	Pending
	Land north of A674, Chorley	Ruttles	116,000 sand and gravel	Full	15/01/2021	Pending
	Waddington Fell Quarry	Armstrongs	Time extension for mineral working until December 2023	s73	4/08/2022	Granted 1/03/23

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Mineral Planning Authority	Site Name and Location (Grid Reference)	Operator / Applicant	Tonnage(mt) (for aggregate use)	Type of Application	Date Submitted	Decision
	Bankfield Quarry, Clitheroe	Tarmac	Time extension for mineral working until 2033	s73	13/12/2018	Approved 24/07/2019 subject to s106
	Bradleys Sandpit	JA Jackson	Time extension for mineral working until 2029	s73	25/10/21	Approved 5/05/2022
	Dunald Mill Quarry, Carnforth	Tarmac	Time extension for mineral extraction	s73	11/10/2021	Undetermined
<b>Greater Manchester</b>						
<b>Notes:</b> <b>C = confidential figure</b>						

# Local Aggregate Assessments

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

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

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

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

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

**Table 9 Local Aggregate Assessments in NAWWP Region**

Mineral Planning Authority	LAA Date	LAA Figure		Calculation Method
		Sand and Gravel (mt)	Crushed Rock (mt)	
Cheshire East	2023	0.462	2.36	The Council has considered other local information to produce an annual average for future aggregate demand for the next 20-year period (2023-2042). The LAA figure identified for sand and gravel has resulted from applying an annual 2% growth rate to the 2020 baseline average 10-year sales figure for the next 20-year period. For crushed rock, the LAA figure is 2.36mt over 20 years. The 1.87mt baseline position (updated to 2022 figures) represents an average of the amount of imported crushed rock to the Cheshire sub-region (CE & CWaC) reported in the last two annual Mineral Surveys of 2.1 Mt (2014) and 1.6 Mt (2019) plus a 2% annual uplift.
Cheshire West and Chester	2023	0.8	N/A	Annual apportionment figure used which originates from the adopted Cheshire West and Chester Local Plan (Part One) Strategic Policies.
Cumbria (Cumberland Council,	Draft 2023	0.8	2.77 – all crushed rock	Sand and gravel provision based on 3yr average sales figure.

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

## Local and National Aggregate Need

The annual rates of provision for aggregates in the North West of England, as outlined within each of the Mineral Planning Authorities LAAs, are 2.4mt for sand and gravel per annum and 9.89mt for crushed rock per annum.

The combined LAA annual provision rate for the North West exceeds the 2022 10 years sales average (2.39) for both sand and gravel and crushed rock (6.89). In the case of sand and gravel, the combined LAA annual provision rate exceeds the 10 year sales average by 0.01mt. In the case of crushed rock, the combined LAA annual provision rate exceeds the 10 year sales average by 3mt.

The current national and sub-national guidelines for aggregates provision are now out of date and are currently under review by DLUHC. As the national and sub-national guidelines are out of date, the NAWWP do not consider them to be a robust baseline to assess whether the North West and its Mineral Planning Authorities are making an appropriate contribution to local and national aggregate need. The combined LAA annual provision rate is the most robust baseline available and has therefore been used instead.

# Trends and Analysis

## Primary aggregates sales

Except for Greater Manchester, Merseyside, Halton & Warrington, sales of sand and gravel decreased in 2022 in comparison to 2021, sales of crushed rock also decreased.

Although the overall sales of sand and gravel had been steady since 2012, the effects of the pandemic, and the ensuing economic consequences, continue to be felt in the sales of 2022. However, this may improve for the 2023 data as the economy is demonstrating signs of recovery. The 3 year average for sand and gravel is well below the 10 year average, demonstrating that there has been a definite impact on the minerals industry from the pandemic and in sales in recent years.

In the case of crushed rock, sales have been steady since 2015. The 3 year average sales are marginally below the 10 year average for crushed rock sales, demonstrating that the impact of the pandemic on the crushed rock aspect mineral and extraction industry is still a little unstable but easing. Cumbria and Lancashire both experienced a decrease in crushed rock sales compared to 2021.

Marine won sand and gravel sales, which had increased over the 10 year period to 2021, saw a decrease in 2022. This is unlikely to be linked to the Port of Barrow ceasing landings in 2017 and more than likely linked to the economic factors resulting from the pandemic that have impacted on the construction industry. Marine won sand and gravel now only lands at the wharves situated along the River Mersey and Seaforth Dock.

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

## Primary aggregate reserves

In the North West of England reserves of sand and gravel decreased from 18.01mt in 2021 to 14.86mt in 2022. Over the 10 years there has been a decreasing trend in sand and gravel reserves, apart from in 2017 where reserves increased from the previous year by approximately 2.0mt.

As previously explained in this report, within the sub-region of Greater Manchester, Merseyside and Halton and Warrington, there is only one operational sand and gravel quarry (Astley Moss), which is why the figures in the report for the sub-region are confidential and should be treated with caution. Astley Moss will cease operation in 2022, which is of concern for the sub-region. Offerton sand and gravel quarry does still have a small amount of reserves, but this site was inactive in 2019 and 2020. The NWAWP are exploring the possibility of marine landings replacing historic land-won sand and gravel sales. There are however applications pending for sand and gravel extraction (Table 8) that could provide additional reserves for the region if approved.

Permitted reserves of crushed rock in the North West increased slightly from 227.88mt in 2021 to 228.91 in 2022. This was due to permission being granted for the extraction of 1.79mt of crushed rock in Lancashire. However, over the last 10 years there has generally been a decreasing trend in crushed rock reserves, apart from 2015 when reserves increased by approximately 26.0mt. The increase in crushed rock reserves in 2015 was due to an increase in reserves in both Cumbria and Lancashire. The North West region is reliant on crushed rock reserves from Cumbria, Lancashire and the Greater Manchester, Merseyside and Halton and Warrington sub region, as there are no crushed rock reserves in Cheshire West and Chester. The crushed rock reserve in Cheshire East is recorded as nil as the landbank of sandstone in the MPA area is not likely to contribute to the supply of crushed rock.

## Secondary and recycled aggregates

The most up to date information of secondary and recycled aggregate is from the Waste Data Interrogator 2022. A survey of fixed construction and demolition recycling facilities and secondary aggregates producers was undertaken in the North West, however, the response rate was low, and therefore the figures in Table 5b should be treated with caution.

The data from the WDI showed 6.4mt of secondary and recycled aggregate were produced in the North West and 8.1mt was managed.

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

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

## Major Construction Projects or Developments

Major construction projects have a significant effect on the aggregate supply within a region. The North West contains two major cities (Manchester and Liverpool), each of which have large development growth aspirations. HS2 Phase 2a (West Midlands - Crewe) and Phase 2b (Crewe – Manchester) was proposed to run through the NAWWP area. Phase 2b has however now been scrapped. Its construction was expected to have a major impact on aggregate demand. This was particularly the case in the Cheshire sub-region where a borrow pit was proposed for phase 2a within Cheshire East. In the case of HS2 Phase 2b<sup>12</sup> 4 borrow pits were proposed to facilitate the construction; 3 in Cheshire West and Chester and 1 in Cheshire East.

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<sup>12</sup> HS2 Phase 2b – Environmental Statement consultation document – Volume 3: Appendix CT-008-00000 Borrow Pit Report

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

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

**Table 10 Major Construction Projects or Developments**

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



North West Aggregate Working Party – AMR 2023

Project/Development Name and Location	Time Scale (estimated start and end date)	Comments
		Delivering approximately 60,000 sqm of office floorspace around the new HS2 station; Providing a minimum of 1,700 new homes to the west of the M56 at Timperley Wedge, up to 2037
Greater Manchester – New Carrington	2020-2037	4,300 dwellings; 350,00sqm of employment floorspace
Warrington – Warrington Western Link		New highway infrastructure to provide a western by-pass of the town centre across the Manchester Ship Canal, linking the A56 to the south of town centre to the A57 to the north.
Warrington – Warrington Waterfront	2021-2038	New urban quarter of 1,335 dwellings (1,070 of which will be delivered within the plan period) and associated infrastructure/services/community facilities.
Warrington – South East Warrington Urban Extension	2021-2038	A sustainable urban extension of around 4,200 dwellings (2,400 of which will be delivered within the plan period) and associated infrastructure/services/community facilities.
Warrington – Fiddlers Ferry	2021-2038	A sustainable mixed use development comprising 101 hectares of employment land and 1,760 dwellings (1,310 of which will be delivered within the plan period) and associated infrastructure/services/community facilities.
Warrington – Peel Hall	2021-2038	A new sustainable community of 1,200 dwellings and associated infrastructure/services/community facilities.
Warrington – South East Warrington Employment Area	2021-2038	A major new employment area of 137 hectares of employment land at the junction of the M6 and M56.
A500 Dualling	2023 - 2025	A500 between Meremoor Moss roundabout and M6 junction 16 to dual carriageway standard.

North West Aggregate Working Party – AMR 2023

Project/Development Name and Location	Time Scale (estimated start and end date)	Comments
Middlewich Eastern Bypass	2024 – 2027	2.8 km long, two-way single carriageway road.
North West Crewe Package	2022 – 2024	2.8 km road scheme.
Royal Arcade, Crewe – Phase 1	2021 – 2023	Town Centre Regeneration - mixed-use development that will include a new bus station, multi-storey car park, cinema, restaurants, public realm, leisure and retail uses.
Liverpool Waters (including Isle of Man Ferry Terminal and New Everton Stadium)	2012-2042	Ongoing construction of several proposals coming forward as part of the Liverpool Waters outline permission including Ferry Terminal (due for completion 2022) and football stadium (starting 2021). Various additional proposals coming forward in phased approach.
Wirral Waters	2012-2034	Ongoing construction of several proposals coming forward as part of the Wirral Waters outline permission with numerous consents currently going through discharge of conditions.
St Helens – Parkside Colliery Regeneration.	Appeal Decision 11/11/21	Construction of up to 92,900 m2 of employment floorspace (Use Class B8 with ancillary B1(a)) and associated servicing and infrastructure including car parking; vehicle and pedestrian circulation space; alteration of existing access road including works to existing A49 junction; noise mitigation; earthworks to create development platforms and bunds; landscaping including buffers; works to existing spoil heap; creation of drainage features; substations and ecological works. Discharge of conditions ongoing.
Parkside Link Road and Business Park	Appeal Decision 11/11/21	Formation of a new link road between A49 (Winwick Road) and M6 Junction 22 including the re-alignment of Parkside Road and other associated works. Discharge of conditions ongoing and construction underway.

North West Aggregate Working Party – AMR 2023

Project/Development Name and Location	Time Scale (estimated start and end date)	Comments
Knowsley – Halsnead Garden Village – Sustainable Urban Extension		Granted Garden Village status in 2017 with the scope for up to 1600 homes, substantial employment uses and an integrated country park. Being developed by various housebuilders with numerous applications ongoing, most now at discharge of conditions stage.
Knowsley – Land East of Halewood – Sustainable Urban Extension		Up to 1,100 dwellings with public open space including flood storage and mitigation measures. Being developed by various housebuilders with numerous applications ongoing, most now at discharge of conditions stage.
Sefton – Land East of Maghull	Appeal Decision 22 February 2021 and planning permission 21 October 2021	Hybrid application including new distributor road, flood relief, drainage and landscaping works to Whinny Brook and ancillary infrastructure and 1685 residential dwellings (C3), an older persons housing scheme with access also reserved (C2, C3), a mixed-use Local Centre (Uses A1-A5, C3, D1, D2);
Halton –East Runcorn Strategic Daresbury site and Sandymoor		<p>Strategic Daresbury Site includes 26ha for expansion of B1 science, hi tech research and development, 40ha for office and knowledge-based facilities, up to 1400 dwellings and mixed use local centre.</p> <p>Sandymoor – completion of Sandymoor residential area with 1400 additional units, new local centre and primary school.</p> <p>Both include various phases with applications at different stages.</p>
Cumbria – Carlisle Southern Link Road	Commencing 2022	To enable the strategic growth to the south of Carlisle.
Cumbria – A66 dualling	Expected to commence 2024/2025	Currently at pre-planning stage with consultation on preferred routes taking place during 2021. DCO submission expected 2023.

North West Aggregate Working Party – AMR 2023

Project/Development Name and Location	Time Scale (estimated start and end date)	Comments
Cumbria – St Cuthbert’s Garden Village	Expected to commence within the next 5 years – delivery of full scheme beyond 2030	<p>Significant urban extension to the south of Carlisle, proposed to accommodate 10,000 new homes along with new schools and community facilities.</p> <p>Draft St.Cuthbert’s Local Plan went to consultation in November 2020. Construction of the first sites is expected to commence within the next 5 years, delivery of the full scheme would extend beyond 2030.</p>
Cumbria - A595 Grizebeck improvement scheme	Estimated start 2024	1.4km single carriageway replacement section with associated bridge and junction works. Planning permission granted October 2022. DfT decision expected early 2024.
Lancashire - Cuerden strategic site	ongoing	<p>The delivery of new employment floor space</p> <p>The provision of up to 116 additional homes</p> <p>Significant investment in infrastructure, including highways and, pedestrian/cycle routes</p>
Lancashire - Preston Western Distributor	ongoing - 2023	The Preston Western Distributor road scheme allows people to travel more easily around parts of the Preston and Fylde area.
Lancashire - Fylde/Heyhouses M55 Link	ongoing - 2024	The M55 to Heyhouses Link Road will create a much better connection between Lytham St Annes and the M55 motorway, relieving congestion on smaller local roads and supporting the commercial viability of local housing and business development sites.
Lancashire – Highways England A585 Improvement	Ongoing – completion in 2024	Bypass of Little Singleton

## Key Conclusions

At 31 December 2022, the reserves of sand and gravel in the North West were below the minimum 7 year landbank (at a figure of 6.22 years) and in the case of crushed rock above the minimum 10 year landbank (at a figure of 33.13 years). This is based on a combined LAA annual provision rate, in the absence of national and sub-national guidelines. However, these figures should be treated with caution due the notable drop in extraction levels that occurred as a result of the impacts of the pandemic.

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

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

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

## Appendix 1 NAWWP Meetings

**Table 11 NAWWP Region AWP Meetings**

Meeting Date	Link to minutes of the meeting	Summary of Key Points
10 March 2022		The following matters were discussed. <ul style="list-style-type: none"> <li>- Positions on current Marine Resources and Reserves</li> <li>- Perceived gaps in mineral supply</li> <li>- Product availability offshore</li> <li>- Supply chain issues</li> <li>- The 2021 NWAP AMR</li> <li>- Phase 2b of the HS2 Environment Statement</li> </ul>
30 June 2022		The following matters were discussed <ul style="list-style-type: none"> <li>- NAWWP survey operator returns</li> <li>- Local Aggregate Assessments</li> <li>- Updates from Planning Authorities</li> <li>- Industry Update</li> <li>- DLUHC Update</li> <li>- Appointment of a NAWWP Chairperson</li> </ul>
30 November 2022		The following matters were discussed <ul style="list-style-type: none"> <li>- Follow up on marine aggregate issues (from 30 March 2022 meeting)</li> <li>- Inviting additional persons to the meeting</li> <li>- The possibility that operator surveys be made mandatory</li> <li>- Members Local Aggregate Assessments – how they should be agreed and ratified.</li> <li>- Update on Plan preparation from the Planning Authorities</li> <li>- AMR Report</li> <li>- HS2 discussions</li> <li>- Industry Update</li> <li>- DLUHC Update</li> <li>- Terms of Reference for AWPs</li> </ul>
6 June 2023		The following matters were discussed: <ul style="list-style-type: none"> <li>- Progress of the NAWWP AMR 2022 (2021 data)</li> <li>- DLUHC Update – including status of the Reform Planning Bill.</li> <li>- Local Aggregate Assessments</li> <li>- Updates from Planning Authorities</li> <li>- HS2</li> <li>- Industry Update</li> </ul>
22 November 2023		The following matters were discussed: <ul style="list-style-type: none"> <li>- A presentation was given by Mersey Forest with support from DEFRA on Nature Recovery on Vacant and Derelict Land</li> </ul>

*North West Aggregate Working Party – AMR 2023*

		<ul style="list-style-type: none"><li>- Update given on the ratification of the NWAWP AMR 2022 (2021 data) and the draft of the NWAWP 2023 (2022 data)</li><li>- Local Aggregate Assessments</li><li>- Updates from Planning Authorities</li><li>- Industry Updates</li><li>- DLUHC update including information on the National Aggregate Monitoring Survey (2023 data)</li></ul>
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