

Cheshire West & Chester Council

Yorkshire and Humber Aggregate Working Party

Annual Monitoring Report 2014

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Executive Summary

The Yorkshire and Humber Aggregate Working Party (YHAWP) is one of nine similar working parties established throughout England and Wales in the 1970s, the core function of which is monitoring the reserves and sales of primary and secondary aggregates, and imports and exports of primary aggregate.

The YHAWP is divided into four sub-regions: North Yorkshire, South Yorkshire, West Yorkshire and East Riding and North Lincolnshire. North Yorkshire is comprised of North Yorkshire County Council, the Yorkshire Dales National Park, North York Moors National Park Authority and City of York Council. South Yorkshire includes Doncaster, Barnsley and Rotherham Metropolitan Borough Councils and Sheffield City Council. West Yorkshire comprises Leeds City Council, Calderdale Council, Bradford, Kirklees and Wakefield Metropolitan District Councils. East Riding and North Lincolnshire includes East Riding of Yorkshire Council, Kingston Upon Hull City Council, North East Lincolnshire Council and North Lincolnshire Council. The Membership of the AWP is set out in Appendix A 'Yorkshire & Humber AWP Membership'.

The 2014 report provides data and analysis of sales, reserves and landbanks of primary land-won aggregate for the ten year period 2004 to 2013. For some sub-regions data is either incomplete or missing, this will be updated in future reports where data becomes available.

The previous technical advice of the Aggregate Working Party was that aggregate provision and landbanks should be calculated using a rolling 7 year average sales figure. This advice has now been reviewed and a 10 year rolling average is now used in line with the National Planning Policy Framework (NPPF) and Planning Practice Guidance (PPG). Local Aggregate Assessments for the member authorities also provide reviews of landbanks using a 10 year rolling average alongside other relevant local information.

1 Yorkshire & Humber

Aggregate sales

1.1 During the 2013 monitoring period total aggregate land-won sand and gravel sales fell slightly by 1.2 per cent from 2.54mt in 2012 to 2.51mt. This is above the three year average of 2.50mt per annum and data illustrates a relatively stable supply pattern since 2010 when sales were recorded at 2.56mt. This is far lower than sales figures experienced between 2004 to 2008 when sales were recorded at an average of 4.31mt per annum but is reflection of the wider economic market. Future monitoring will enable a more thorough analysis of post-2008 sales patterns in the region.

Table 1.1 Aggregate land-won sand and gravel sales (million tonnes)

Sub-region	2004	2005	2006	2007	2008	2009	2010	2011	2012	2013
North Yorkshire	2.8	2.8	2.7	2.7	2.3	1.7	1.6	1.7	1.6	1.5
South and West Yorkshire	0.6	0.5	0.5	0.4	0.4	0.5	0.26	0.24	0.24	0.18
East Riding and North Lincolnshire	1.1	1.1	1.2	1.3	1.13	1.0	0.7	0.5	0.7	0.83
Total Yorkshire and Humber	4.5	4.4	4.4	4.4	3.83	3.2	2.56	2.44	2.54	2.51

1.2 During the 2013 monitoring period total aggregate crushed rock sales continued to increase by nearly 7 per cent from 7.09mt in 2012 to 7.58mt. This continues the upward trend experienced in the region since 2011 when sales were recorded at the lowest level for over ten years. Sales fell sharply in 2009 from a pre-2008 average of approximately 12mt per annum to an average of approximately 7.2mt. This reflects the conditions of the wider economic market and is in line with the average percentage fall in sales levels for aggregate land-won sand and gravel.

Table 1.2 Aggregate crushed rock sales (million tonnes)

Sub-region	2004	2005	2006	2007	2008	2009	2010	2011	2012	2013
North Yorkshire	8.0	7.9	7.7	8.3	7.7	5.3	5.51	4.54	5.33	5.65
South and West Yorkshire	4.3	4.2	3.7	3.4	3.1	2.3	1.63	1.48	1.45	1.68
East Riding and North Lincolnshire	0.3	0.4	0.3	0.3	0.2	0.1	0.2	0.3	0.31	0.25
Total Yorkshire and Humber	12.6	12.5	11.7	12.0	11.0	7.7	7.34	6.32	7.09	7.58

1.3 Analysis of marine dredged aggregate sand and gravel removal and landing rates is included within Chapter Marine dredged aggregate. Whilst data relating to sales is not currently available, landing figures are a reasonable representation of sales due to the relatively low level of stockpiled materials at wharves in the area.

Aggregate reserves

1.4 Aggregate sand and gravel reserves increased by nearly 10 per cent during 2013 from 40.71mt in 2012 to 44.48mt as at 31 December 2013. This increase is directly attributable to the 4.1mt rise in recorded reserves for the East Riding and North Lincolnshire sub-region, but does not necessarily represent any release of new reserve due to issues with monitoring in previous years. Please refer to Chapter East Riding and North Lincolnshire. Reserves also increased slightly in the South and West Yorkshire sub-region where reserves increased by 0.14mt due to the inclusion of one site that previously had not made monitoring returns. In light of these two issues it will be important to closely monitor any changes in reported reserve figures for sand and gravel in the sub-region.

Table 1.3 Aggregate land-won sand and gravel reserves (million tonnes)

Sub-region	2004	2005	2006	2007	2008	2009	2010	2011	2012	2013
North Yorkshire	28.04	24.29	22.85	20.65	20.02	18.4	17.98	16.24	19.1	18.63
South and West Yorkshire	14.3	10.5	10.3	10.14	10.0	5.33	5.95	5.99	5.81	5.95
East Riding and North Lincolnshire	~	~	~	~	~	14.4	14.2	16.5	15.8	19.9
Total Yorkshire and Humber	42.34	34.79	33.15	30.79	30.02	38.13	38.13	38.73	40.71	44.48

1.5 Aggregate crushed rock reserves fell by less than one per cent during the 2013 monitoring period from 276.3mt as at 31 December 2012 to 274.7mt, 5.98mt higher than would have been expected when taking account of the increase in sales figures for the same period. The higher than expected reserve figure is due to the reclassification of reserves at certain sites and the inclusion of previously excluded reserves at others. Reserves fell in the North Yorkshire and East Riding and North Lincolnshire sub-regions but increased by just over two per cent in the South and West Yorkshire sub-region due to the reclassification of reserves. As with sand and gravel reserves it will be important to closely monitor any changes in reported reserve figures for crushed rock in both the Annual Monitoring Reports and authority's Local Aggregate Assessments.

Table 1.4 Aggregate crushed rock reserves (million tonnes)

Sub-region	2004	2005	2006	2007	2008	2009	2010	2011	2012	2013
North Yorkshire	242.65	240.1	233.2	225.1	220.7	210.1	204.6	202.2	191.82	189.79
South and West Yorkshire	93.7	65.1	62.8	60.8	58.8	90.5	78.14	76.67	78.71	80.36
East Riding and North Lincolnshire	~	~	~	~	~	1.7	2.5	7.18	5.78	4.53
Total Yorkshire and Humber	336.35	305.2	296.0	285.9	279.5	302.3	285.2	286.1	276.3	274.7

2 North Yorkshire

2.1 The North Yorkshire sub-region is comprised of North Yorkshire County Council, Yorkshire Dales National Park, City of York Council and North York Moors National Park. Aggregate extraction only takes place in North Yorkshire County Council and Yorkshire Dales National Park plan areas.

Aggregate sand and gravel sales, reserves and landbank

2.2 Tables 1.1 and 1.2 details sales and reserve data for land-won aggregate sand and gravel for the annual monitoring periods 2004 to 2013. This data relates solely to sites within the North Yorkshire County Council area, the Yorkshire Dales National Park Authority does not contain any permitted reserves of aggregate sand and gravel.

2.3 Sales of aggregate land-won sand and gravel have declined slightly during the 2013 monitoring period from 1.6mt to 1.5mt, the lowest recorded sales figure for more than ten years. Sales had been relatively stable at an average of 1.65mt per annum between 2009 to 2012. Whilst the fall in sales is only slight the pattern of sales will need to be monitored closely in the next monitoring period covering 2014 sales data.

2.4 Reserves of aggregate land-won sand and gravel have reduced by approximately 2.5 per cent from 19.1mt as at 31 December 2012 to 18.63mt. This is approximately 1mt more than would have been expected given the relatively low sales figure for the monitoring period and is due to the release of additional reserves at an existing quarry during the monitoring period.

2.5 The landbank for aggregate land-won sand and gravel has remained decreased by just under one year to 8.71 years, remaining relatively stable. The stability in landbank is due to the higher reserve figure than would have been expected and a slightly reduced average sales figure. The landbank is in excess of the minimum seven year requirement set out in the National Planning Policy Framework and will continue to be reviewed on an annual basis through the AWP annual monitoring and North Yorkshire County Council's Local Aggregate Assessment.

Table 2.1 North Yorkshire sand and gravel sales (million tonnes)

	2004	2005	2006	2007	2008	2009	2010	2011	2012	2013
North Yorkshire County Council	2.8	2.8	2.7	2.7	2.3	1.7	1.6	1.7	1.6	1.5
Total sales	2.8	2.8	2.7	2.7	2.3	1.7	1.6	1.7	1.6	1.5

Table 2.2 North Yorkshire sand and gravel reserves (million tonnes)

	2004	2005	2006	2007	2008	2009	2010	2011	2012	2013
North Yorkshire County Council	28.04	24.29	22.85	20.65	20.02	18.4	17.98	16.24	19.1	18.63
Total reserves	28.04	24.29	22.85	20.65	20.02	18.4	17.98	16.24	19.1	18.63

Table 2.3 North Yorkshire sand and gravel landbank

	Landbank as at 31.12.2012	Permitted reserves as at 31.12.2013	10 year average sales	Landbank as at 31.12.2013
North Yorkshire County Council	9.41 years	18.63mt	2.14mt	8.71 years
Total landbank	9.41 years	18.63mt	2.14mt	8.71 years

Aggregate crushed rock sales, reserves and landbank

2.6 Tables 1.4 and 1.5 provide sales and reserve data for land-won crushed rock in the North Yorkshire sub-region for the monitoring periods 2004 to 2012. Table 1.6 provides landbank data for the sub-region.

2.7 Sales of aggregate crushed rock increased by 6 per cent during the monitoring period from 5.33mt in 2012 to 5.65mt. This continues the upward trend and is the highest recorded figure since 2008. However, sales remain far lower than levels experienced prior to 2009 when average sales figures were 7.92mt per annum. The Yorkshire Dales National Park saw the largest increase in sales, where figures increased by 8.4 per cent from 2.63mt in 2012 to 2.85mt. Sales from the North Yorkshire County Council area also increased but at a lower rate of 3.7 per cent from 2.7mt in 2012 to 2.8mt.

2.8 Reserves of crushed rock aggregate reduced by only 1.1 per cent from 191.82mt at the end of 2012 to 189.79mt as at 31 December 2013. This figure is higher than would have been expected given the increased sales figures for the monitoring period and is due to the inclusion of reserve data for Darrington Quarry in the North Yorkshire sub-region. Darrington Quarry straddles both the Wakefield and North Yorkshire County Council administrative areas but in order to maintain commercial confidentiality data is reported solely in the North Yorkshire sub-region. Reserves in the Yorkshire Dales National Park area fell by 4.29 per cent from 89.22mt in 2012 to 85.39mt as at 31 December 2013. This fall is roughly in line with what would have been expected when considered against the sales figures for the monitoring period. Landbank figures for both areas have remained far in advance of the minimum ten year requirement set out in the National Planning Policy Framework but have reduced slightly from 2012 figures to 31.7 years in North Yorkshire County Council and 25.9 years in the Yorkshire Dales National Park.

Table 2.4 North Yorkshire crushed rock sales (million tonnes)

	2004	2005	2006	2007	2008	2009	2010	2011	2012	2013
North Yorkshire County Council ⁽¹⁾	4.2	3.9	3.8	4.3	3.8	2.6	2.9	1.9	2.7	2.8
Yorkshire Dales National Park	3.8	4.0	3.9	4.0	3.9	2.7	2.61	2.64	2.63	2.85
Total sales	8.0	7.9	7.7	8.3	7.7	5.3	5.51	4.54	5.33	5.65

1. Sales data for Darrington Quarry is included within North Yorkshire CC

Table 2.5 North Yorkshire crushed rock reserves (million tonnes)

	2004	2005	2006	2007	2008	2009	2010	2011	2012	2013
North Yorkshire County Council ⁽¹⁾	105.35	108.3	105.2	101.1	100.5	103.9	101.0	97.7	102.6	104.4
Yorkshire Dales National Park	137.3	131.8	128.0	124.0	120.2	106.2	103.6	104.5	89.22	85.39
Total sales	242.65	240.1	233.2	225.1	220.7	210.1	204.6	202.2	191.82	189.79

1. Reserve data for Darrington Quarry is included within North Yorkshire CC

Table 2.6 North Yorkshire crushed rock landbank

	Landbank as at 31.12.2012	Permitted reserves as at 31.12.2013	10 year average sales	Landbank as at 31.12.2013
North Yorkshire County Council	33.1 years	104.4mt	3.29mt	31.7 years
Yorkshire Dales National Park	27.9 years	85.39mt	3.30mt	25.9 years
North Yorkshire	30.44 years	189.79mt	6.59mt	28.8 years

Aggregate sites

Table 2.7 North Yorkshire aggregate sites

Site Name	Material	Operator name	Survey returned?	Authority	Status in 2013
Allerton Park Quarry	Sand and Gravel	Hanson	Yes	North Yorkshire CC	Closed
Arcow Quarry	HSA	Lafarge Tarmac	Yes	Yorkshire Dales National Park Authority	Active
Barnsdale Bar Quarry	Limestone	FCC Environment	Yes	North Yorkshire CC	Active
Barton Quarry	Limestone	Sherburn Stone Company Ltd	Yes	North Yorkshire CC	Active
Black/Leyburn Quarry	Limestone	Cemex	Yes	North Yorkshire CC	Active
Bridge Farm Quarry	Sand and Gravel	Cemex	Yes	North Yorkshire CC	Active
Brotherton Quarry/Foxcliffe Quarry	Limestone	FCC Environment	Yes	North Yorkshire CC	Inactive
Darrington Quarry/Criddling Stubbs NB Mineral extracted in Wakefield but processed in North Yorkshire (data for this site is included within that provided for North Yorkshire CC)	Limestone	FCC Environment	Yes	North Yorkshire CC	Active
Drax Power Station	Ash	Drax Power Station	Yes	North Yorkshire CC	Active
Dry Rigg Quarry	HSA	Lafarge Tarmac	Yes	Yorkshire Dales National Park Authority	Active
Eggborough Power Station	Ash	Eggborough Power	Yes	North Yorkshire CC	Active

Site Name	Material	Operator name	Survey returned?	Authority	Status in 2013
Ellerton/Manor Farm Quarry	Sand and Gravel	Lafarge Tarmac	Yes	North Yorkshire CC	Inactive
Forcett Quarry	Limestone	Hanson	Yes	North Yorkshire CC	Active
Gebdykes Quarry	Limestone	Lightwater Quarries	Yes	North Yorkshire CC	Active
Horton Quarry	Limestone	Hanson UK	Yes	Yorkshire Dales National Park Authority	Active
Hovingham	Crushed Rock	Cemex	Yes	North Yorkshire CC	Inactive
Ingleton Quarry	HSA	Hanson UK	Yes	Yorkshire Dales National Park Authority	Active
Ings Farm, Yedingham	Sand and Gravel	Morley Brothers	Yes	North Yorkshire CC	Active
Jackdaw Crag Quarry	Limestone	FCC Environment	Yes	North Yorkshire CC	Active
Kellingley	Coal/ Colliery Spoil	UK Coal Operations Ltd	Yes	North Yorkshire CC	Active
Kiplin Hall Quarry	Sand and Gravel	Lafarge Tarmac	Yes	North Yorkshire CC	Active
Marfield Quarry	Sand and Gravel	Lafarge Tarmac	Yes	North Yorkshire CC	Active
Melsonby/Low Grange Quarry	Limestone	Low Grange Quarry Limited	Yes	North Yorkshire CC	Active
Mill Balk Quarry	Sand	Plasmor	Yes	North Yorkshire CC	Inactive
New Road/Broach Road/ Hensall Quarry	Building Sand	FCC Environment	Yes	North Yorkshire CC	Active
Newbridge Quarry	Limestone	Cemex	Yes	North Yorkshire CC	Active
Newthorpe Quarry	Limestone	FCC Environment	Yes	North Yorkshire CC	Inactive
Nosterfield Quarry	Sand and Gravel	Lafarge Tarmac	Yes	North Yorkshire CC	Active

Site Name	Material	Operator name	Survey returned?	Authority	Status in 2013
Palsett Hill Quarry	Sand and Gravel	Cemex	Yes	North Yorkshire CC	Active
Pateley Bridge/Coldstones Quarry	Limestone	Hanson	Yes	North Yorkshire CC	Active
Potgate Quarry	Limestone	Lightwater Quarries	Yes	North Yorkshire CC	Active
Ripon City Quarry	Sand and Gravel	Aggregate Industries	Yes	North Yorkshire CC	Active
Ripon Quarry	Sand and Gravel	Hanson	Yes	North Yorkshire CC	Active
Scorton Quarry	Sand and Gravel	Lafarge Tarmac	Yes	North Yorkshire CC	Active
Settrington Quarry	Limestone	Fenstone Quarries Ltd	Yes	North Yorkshire CC	Active
Skipton Quarry	Crushed Rock	Lafarge Tarmac	Yes	North Yorkshire CC	Inactive
Smaws Quarry	Crushed Rock	S Smith and Son	Yes	North Yorkshire CC	Closed, being restored
Swinden Quarry	Limestone	Lafarge Tarmac	Yes	Yorkshire Dales National Park Authority	Active
Wath Quarry	Limestone	Lafarge Tarmac	Yes	North Yorkshire CC	Active
Weeland Road/Hensall Quarry	Sand	FCC Environment	Yes	North Yorkshire CC	Active
Wensley Quarry	Limestone	Lafarge Tarmac	Yes	North Yorkshire CC	Active
Went Edge Quarry	Limestone	Meakin Properties	Yes	North Yorkshire CC	Active
West Heselton Quarry	Sand	Cook and Son	Yes	North Yorkshire CC	Active
Whitewall Quarry	Limestone	W C Watts Ltd	Yes	North Yorkshire CC	Active
Wykeham Quarry	Sand and Gravel	Hanson	Yes	North Yorkshire CC	Active

3 South and West Yorkshire

3.1 The South Yorkshire sub-region is comprised of Doncaster, Barnsley and Rotherham Metropolitan Borough Councils and Sheffield City Council. All aggregate sites within this sub-region are located in the Doncaster and Rotherham Metropolitan Borough Council areas.

3.2 The West Yorkshire sub-region comprises Leeds City Council, Bradford, Kirklees and Wakefield Metropolitan District Councils and Calderdale Council.

3.3 Data for the South Yorkshire sub-region and West Yorkshire sub-region have been combined in some previous monitoring periods at the request of operators. Where data is available for the separate sub-regions this will be reported.

3.4 Please note some data for the 2010 and 2011 monitoring period remains unavailable for the West Yorkshire sub-region. This data will be reported in future monitoring reports if it becomes available.

Aggregate sand and gravel sales, reserves and landbank

3.5 Table 2.1 provides sales data for land-won aggregate sand and gravel for the monitoring periods 2004 to 2013. Some of the reported data includes officer estimates for both sales and reserves where operators have not made a return for the relevant monitoring period. Data for sales of non-aggregate sand and gravel have also been included in total sales figures up to and including the 2008 monitoring period. It is therefore difficult to assess the sales pattern of aggregate sand and gravel prior to 2009. It should also be noted that one site within the South Yorkshire sub-region straddles two administrative boundaries. No extraction or sales have taken place in the South Yorkshire portion of this site in the monitoring periods 2009 to 2013.

3.6 During the 2013 monitoring period sales have fallen by 25 per cent from 0.24mt in 2012 to 0.18mt. This is the lowest recorded sales figure for over ten years and is some 0.20mt short of the ten year average sales figure of 0.38mt. This is however in line with sales patterns for aggregate sand and gravel in the North Yorkshire sub-region and reflects a dip in the wider market in general.

3.7 Reserves of land-won sand and gravel fell sharply during the 2009 monitoring period but have remained relatively stable since. Reserves increased during 2013 by 2.4 per cent from 5.81mt in 2012 to 5.95mt. This rise is directly attributed to the inclusion of one site in the 2013 monitoring round that had not previously been included. However, reserves in West Yorkshire have now been depleted. The affect of this will need to be monitored and assessed in future monitoring reports and Local Aggregate Assessments within the sub-region and surrounding areas.

3.8 Separate landbank figures have not previously been available due to the collated sales figures for both sub-regions. Whilst ten year average sales figures will continue to be based on the collated data it should be noted that due to the depletion of reserves in West Yorkshire the landbank figure solely relates to the South Yorkshire sub-region. The landbank has decreased slightly despite the rise in reserves by just under one year from 16.14 years in 2012 to 15.7 years as at 31 December 2013 but remains in excess of the 7 year requirement as set out in the NPPF.

3.9 It should be noted that reserves of sand and gravel in South Yorkshire are almost exclusively made up of soft sand deposits. Furthermore the Doncaster Core Strategy states 'For sand and gravel, the evidence indicates that it will be difficult to maintain a supply of sand and gravel to meet the apportionment up to the end of the plan period, nor to maintain a 7 year landbank beyond mid-2016'⁽¹⁾. This will need to be kept under close review through both the Annual Monitoring Report and Local Aggregate Assessments.

1 Paragraph 7.23, CS20: Minerals, Doncaster Council Core Strategy 2011-2028, May 2012

Table 3.1 South and West Yorkshire sand and gravel sales (million tonnes)

	2004	2005	2006	2007	2008	2009	2010	2011	2012	2013
South Yorkshire	0.6	0.5	0.5	0.4	0.4	0.5	0.26	0.24	0.24	0.18
West Yorkshire										
Total	0.6	0.5	0.5	0.4	0.4	0.5	0.26	0.24	0.24	0.18

Table 3.2 South and West Yorkshire sand and gravel reserves (million tonnes)

	2004	2005	2006	2007	2008	2009	2010	2011	2012	2013
South Yorkshire	14.3	10.5	10.3	10.14	10.0	5.0	5.7	5.79	5.67	5.95
West Yorkshire ⁽¹⁾	~	~	~	~	~	0.33	0.25	0.20	0.14	0.00 ⁽²⁾
Total	14.3	10.5	10.3	10.14	10.0	5.33	5.95	5.99	5.81	5.95

1. ~ No data available

2. Reserves now depleted in this sub-region

Table 3.3 South and West Yorkshire sand and gravel landbank

	Landbank as at 31.12.2012	Permitted reserves as at 31.12.2013	10 year average sales	Landbank as at 31.12.2013
South and West Yorkshire	16.14 years	5.95mt	0.38mt	15.7 years

Aggregate crushed rock sales, reserves and landbank

3.10 Total sales of crushed rock increased by 15.9 per cent from 1.45mt in 2012 to 1.68mt. The increase was experienced in both the South and West Yorkshire sub-regions by 11.4 per cent and 32.2 per cent respectively. This is a reversal of year on year decline between 2008 and 2012 when total sales were recorded at a low of 1.45mt. Whilst sales remain far below pre-2008 levels the upward trend is encouraging and reflects the increase in sales experienced in the North Yorkshire sub-region.

3.11 Total reserves of crushed rock aggregate have increased by 2.1 per cent from 78.71mt in 2012 to 80.36mt. This rise is due to the reclassification of reserves at one site to aggregate where previously classified as building stone in West Yorkshire, where reserves have increased from 17.91mt in 2012 to 20.86mt. Reserves in the South Yorkshire sub-region have steadily declined since 2009 when reserves

were recorded at 63.4mt falling to 59.5mt in 2013. The reserves have however reduced in line with sales patterns for the sub-region.

3.12 The total landbank for crushed rock aggregate as at 31 December 2013 was 29.5 years, a fall of two and a half years from 32 years in 2012. This fall is due to declining reserves in the South Yorkshire sub-region where the landbank has reduced by five years from 36.2 years in 2012 to 31.2 years. The landbank in the West Yorkshire sub-region has increased by nearly three years as a result of the increase in reserves classified for aggregate use. Landbanks in both areas remain far in excess of the minimum ten year requirement set out in the NPPF. Reserve and landbank figures should be monitored closely over the next monitoring period to assess the impact of the reassessment of reserves and ensure that the classification as aggregate has remained.

Table 3.4 South and West Yorkshire crushed rock sales (million tonnes)

	2004	2005	2006	2007	2008	2009	2010	2011	2012	2013
South Yorkshire	3.1	3.0	2.6	2.3	2.2	1.4	1.1	1.05	1.14	1.27
West Yorkshire	1.2	1.2	1.1	1.1	0.9	0.9	0.53	0.43	0.31	0.41
Total	4.3	4.2	3.7	3.4	3.1	2.3	1.63	1.48	1.45	1.68

Table 3.5 South and West Yorkshire crushed rock reserves (million tonnes)

	2004	2005	2006	2007	2008	2009	2010	2011	2012	2013
South Yorkshire	93.7	65.1	62.8	60.8	58.8	63.4	62.4	61.23	60.8	59.5
West Yorkshire ⁽¹⁾	~	~	~	~	~	27.14	15.74*	15.44*	17.91	20.86
Total	93.7	65.1	62.8	60.8	58.8	90.5	78.14	76.67	78.71	80.36

1. * Incomplete data, ~ Data unavailable

Table 3.6 South and West Yorkshire crushed rock landbank

	Landbank as at 31.12.2012	Permitted reserves as at 31.12.2013	10 year average sales	Landbank as at 31.12.2013
South Yorkshire	36.2 years	59.5mt	1.91mt	31.2 years
West Yorkshire	23 years	20.86mt	0.81mt	25.8 years
Total	32 years	80.36mt	2.72mt	29.5 years

Aggregate sites

Table 3.7 South and West Yorkshire Aggregate Sites

Site Name	Material	Operator name	Survey returned?	Authority	Status in 2012
Airfield Quarry	Sand and Sandstone	Johnsons Wellfield Quarries	Yes	Kirklees Council	Active
Appleton Quarry	Sandstone	Marshalls Natural Stone	Yes	Kirklees Council	Active
Armthorpe Quarry	Sand	Cemex UK	Yes	Doncaster	Inactive
Austerfield Quarry	Sand	Hanson UK	Yes	Doncaster	Active
Arthington Quarry	Sandstone	Assoc Waste Management Ltd	Yes	Leeds City Council	Active
Bank Top Quarry	Sandstone	M & M Yorkshire Stone	No	Bradford	Active
Barnsdale Bar NB Straddles two administrative areas (North Yorkshire County Council and Doncaster)	Limestone	Darrington Quarries	Yes	Doncaster	Active (inactive in the Doncaster area of the site)
Beacon Lodge Quarry	Sandstone	Leo Group Ltd	No	Calderdale	Active
Blackhill Quarry	Sandstone	Mone Bros Excavations Ltd	Yes	Leeds City Council	Active
Blaxton Quarry	Sand	Lafarge Tarmac	Yes	Doncaster	Inactive
Bolton Woods Quarry	Sandstone	The Pickard Group/ Hard York Quarries	No	Bradford	Active

Site Name	Material	Operator name	Survey returned?	Authority	Status in 2012
Britannia Quarry	Sandstone	Woodkirk Stone Sales Ltd	Yes	Leeds City Council	Active
Cadeby Quarry	Limestone	Cadeby Stone	Yes	Doncaster	Active but not for aggregate
Cromwell Quarry	Sandstone	Marshalls Plc	Yes	Calderdale	Active
Crows Nest	Sandstone	Marshalls Plc	Yes	Calderdale	Inactive
Darrington Quarry NB Straddles two administrative areas (North Yorkshire County Council and Wakefield) - data is included with that for North Yorkshire County Council	Limestone	FCC Environment	Yes	Wakefield	Active
Dunsville	Sand	Breedon Aggregates	Yes	Doncaster	Active
Elland Edge Quarry	Sandstone	Rand & Asquith	No	Calderdale	Active
Fagley Quarry	Sandstone	The Pickard Group/ Hard York Quarries	No	Bradford	Active
Finningley Quarry NB Straddles two administrative areas (Doncaster and Nottinghamshire)	Sand and Gravel	Lafarge Tarmac	Yes	Doncaster	Active (inactive in the Doncaster area of the site)
Fly Flatts Delph Quarry	Sandstone, Grit	Rand & Asquith	Yes	Calderdale	Active
Gibb Lane Quarry	Sandstone	Smiths Haulage & Contracting Ltd	No	Calderdale	Active
Hainworth Shaw Quarry	Sandstone	Hainworth Shaw Quarries	No	Bradford	Active
Harrycroft	Limestone	Lafarge Tarmac	Yes	Rotherham	Inactive
Hawksworth Quarry	Sandstone	Apperley Bridge Transport Ltd	Yes	Leeds City Council	Active

Site Name	Material	Operator name	Survey returned?	Authority	Status in 2012
Hazel Lane	Limestone	Cat Plant	No	Doncaster	Active
High Moor Quarry	Limestone	Sam Smith Old Brewery Ltd	Yes	Leeds City Council	Active
Holme Hall Quarry	Limestone	Hope Construction	Yes	Doncaster	Active
Howley Park Quarry	Sandstone	Marshalls Mono Ltd	Yes	Leeds City Council	Active
Methley Quarry	Sand and Gravel	Lafarge Tarmac	Yes	Leeds City Council	Active
Moor Top Quarry	Sandstone	RG Stone Sales Ltd	Yes	Leeds City Council	Active
Moselden Quarry	Sandstone	Marshalls Natural Stone	Yes	Kirklees Council	Active
Mount Tabor Quarry	Sandstone, Grit	Hard York Quarries	Yes	Calderdale	Active
Naylor Hill Quarry	Sandstone	Dennis Gillson & Son Haworth Ltd	Yes	Bradford	Active
Northowram Hill Quarry	Sandstone	Mr R Farrar	No	Calderdale	Active
Pasture House Quarry	Sandstone	Marshalls Plc	Yes	Calderdale	Active
Pinnar Lane Quarry	Sandstone	W S Crossley	No	Calderdale	Active
Park Balk Farm Quarry	Limestone	Plasmor Ltd	No	Wakefield	Active
Pond Quarry	Sandstone	Hard York	No	Calderdale	Active
Pule Hill Quarry	Sandstone	Cleanmet Ltd	No	Calderdale	Active
Scout Quarry	Sandstone	Cleanmet Ltd	No	Calderdale	Active
Sovereign	Sandstone	Marshalls Natural Stone	Yes	Kirklees Council	Active
Spring Hill Quarry	Sandstone	Springhill Stone Ltd	No	Calderdale	Active
Squire Hill Quarry	Sandstone	WS Crossley	No	Calderdale	Active
Stainton (Glen) Quarry	Limestone	Marshalls Natural Stone	Yes	Doncaster	Active
Sunny Bank Farm	Sandstone	Mytholm Stone Sales	Yes	Calderdale	Active

Site Name	Material	Operator name	Survey returned?	Authority	Status in 2012
Temple Quarry	Sandstone	Holgate Excavations Ltd	Yes	Kirklees Council	Active
The Lings	Sand	Lafarge Tarmac	Yes	Doncaster	Inactive
Warmsworth Quarry	Limestone	Sibelco UK	Yes	Doncaster	Active
White Rock Quarry	Sandstone	Marshalls Plc	Yes	Calderdale	Inactive
Windyridge Quarry	Sandstone	S & R. M. Peel	Yes	Kirklees	Active
Wood Top Quarry	Sandstone	Cleanmet Ltd	No	Calderdale	Active
Wroot Road Quarry	Sand ⁽¹⁾	Yorkshire Aggregates	No	Doncaster	Active

1. Predominantly horticultural sand

4 East Riding and North Lincolnshire

4.1 The East Riding and North Lincolnshire sub-region comprises East Riding of Yorkshire Council, North Lincolnshire Council, North East Lincolnshire Council and Kingston upon Hull City Council. All aggregate sites within this sub-region are located within North Lincolnshire and East Riding of Yorkshire Council areas. A number of secondary and recycled aggregate sites are however located within North East Lincolnshire Council.

4.2 Please note some data for this sub-region is unavailable. If this data becomes available it will be reported in future monitoring reports. Crushed rock data currently includes sales and reserves of chalk sold as aggregate, this will be reviewed on an ongoing basis in future Annual Monitoring Reports.

Aggregate sand and gravel sales, reserves and landbank

4.3 Table 3.1 provides sales data for land-won aggregate sand and gravel for the monitoring periods 2004 to 2013. Please note data for the monitoring periods 2009 to 2011 is incomplete, if further data becomes available it will be reported in future monitoring reports. Some data also includes officer estimates for both sales and reserves due to a low response rate.

4.4 Data for sales of non-aggregate sand and gravel has been included in total sales figures up to and including the 2008 monitoring period. It is therefore difficult to assess the sales pattern of aggregate sand and gravel prior to 2009. However, there has been a continued upward trend during 2013 with sales increasing by 18.5 per cent from 0.7mt in 2012 to 0.83mt. This is the highest recorded sales figure since 2009 when sales were recorded at a rate of 1mt per annum.

4.5 Very limited data is available for reserves of sand and gravel in the sub-region, efforts will be made in future iterations of the monitoring report to fill these data gaps. Total recorded reserves as at 31 December 2013 were 19.9mt. This is an increase of 4.1mt due to increased reserve levels recorded for East Riding. This may not represent a release of additional resource due to issues with monitoring in this and previous monitoring years. Landbank figures for North Lincolnshire cannot be calculated due to the lack of available data. However, if this data becomes available landbanks will be reported in future reports. The sand and gravel landbank in East Riding has increased in line with the rise in recorded reserves, from 9.89 years to 14.5 years as at 31 December 2013. This landbank will be closely monitored in future annual monitoring reports and the authority's Local Aggregate Assessments.

Table 4.1 East Riding and North Lincolnshire sand and gravel sales (million tonnes)

	2004	2005	2006	2007	2008	2009	2010	2011	2012	2013
East Riding	1.1	1.1	1.2	1.3	1.0	1.0	0.7	0.5	0.7	0.73
North Lincolnshire	~	~	~	~	0.13	~	~	~	0.0	0.1
Total (1)	1.1	1.1	1.2	1.3	1.13	1.0	0.7	0.5	0.7	0.83

1. ~ Data unavailable

Table 4.2 East Riding and North Lincolnshire sand and gravel reserves (million tonnes)

	2004	2005	2006	2007	2008	2009	2010	2011	2012	2013
East Riding	~	1.7	~	~	~	14.4	14.2	14.5	9.1	13.49
North Lincolnshire	~	~	~	~	~	~	~	2.0	6.7	6.5
Total (1)	~	~	~	~	~	14.4	14.2	16.5	15.8	19.9

1. ~ Data unavailable

Table 4.3 East Riding and North Lincolnshire sand and gravel landbank

	Landbank as at 31.12.2012	Permitted reserves as at 31.12.2013	10 year average sales	Landbank as at 31.12.2013
East Riding	9.89 years	13.49mt	0.93mt	14.5 years
North Lincolnshire	***Insufficient data available***			

Aggregate crushed rock sales, reserves and landbank

4.6 Sales of aggregate crushed rock had been relatively stable in the sub-region throughout the period 2006-2012 apart from a brief decline in 2008. However, sales have fallen during 2013 in East Riding by 30 per cent from 0.2mt in 2012 to 0.14mt leading to an overall fall in sales from the sub-region. Sales in North Lincolnshire have remained at a stable level for the third consecutive year suggesting a possible steady demand for this material.

4.7 Reserve data for this sub-region is limited and therefore landbank data should be treated with caution. Reserves as at 31 December 2013 were recorded at 3.4mt in East Riding and 2.03mt in North Lincolnshire, reductions that are roughly in line with sales data for the same period. The landbank in

both areas is in excess of the ten year minimum requirement at 17 years in East Riding and 20.3 years in North Lincolnshire.

Table 4.4 East Riding and North Lincolnshire crushed rock sales (million tonnes)

	2004	2005	2006	2007	2008	2009	2010	2011	2012	2013
East Riding	0.3	0.3	0.2	0.3	0.1	0.1	0.2	0.2	0.2	0.14
North Lincolnshire	~	0.1	0.1	~	0.1	~	~	0.1	0.11	0.11
Total (1)	0.3	0.4	0.3	0.3	0.2	0.1	0.2	0.3	0.31	0.25

1. ~ Data unavailable

Table 4.5 East Riding and North Lincolnshire crushed rock reserves (million tonnes)

	2004	2005	2006	2007	2008	2009	2010	2011	2012	2013
East Riding	~	0.9	~	~	~	0.6	2.5	2.2	3.6	3.4
North Lincolnshire	~	~	~	~	~	1.1	~	4.98	2.18	2.03
Total (1)	~	~	~	~	~	1.7	~	7.18	5.78	5.43

1. ~ Data unavailable

Table 4.6 East Riding and North Lincolnshire crushed rock landbank

	Landbank as at 31.12.2012	Permitted reserves as at 31.12.2013	10 year average sales	Landbank as at 31.12.2013
East Riding	18.95 years	3.4mt	0.2mt	17 years
North Lincolnshire	21.8 years	2.03mt	0.10mt	20.3 years
Total	24.2 years	5.43mt	0.26mt	20.8 years

Aggregate sites

Table 4.7 East Riding and North Lincolnshire Aggregate Sites

Site Name	Material	Operator name	Survey returned?	Authority	Status in 2012
Brandesburton	Sand	Sandsfield	Yes	East Riding	Active
Cove Farm	Silica sand/sand	Sibelco UK	Yes	North Lincolnshire	Active
Eastfield Farm	Silica sand	A.F. Dowson & Sons	Yes	North Lincolnshire	Active
Garton	Sand and Gravel	Clifford Watts	Yes	East Riding	Active
Gransmoor	Sand and Gravel	Clifford Watts	Yes	East Riding	Inactive
Greenwick	Chalk (sold as aggregate)	Fenstone	Yes	East Riding	Active
Kettleby Parks	Sand and Gravel	Breedon Aggregates Ltd	Yes	North Lincolnshire	Active
Kirton Lindsey	Limestone	Welton Aggregates	Yes	North Lincolnshire	Active
Little Catwick	Sand and Gravel	Yarrows Aggregates	Yes	East Riding	Active
Lowthorpe	Chalk (sold as aggregate)	Stablers	Yes	East Riding	Active
Melton Ross	Chalk (sold as aggregate)	Singleton Birch	Yes	North Lincolnshire	Active
Messingham	Silica sand	Sibelco UK	Yes	North Lincolnshire	Active
Middleton	Chalk (sold as aggregate)	Simpson	Yes	East Riding	Active
Mill Hill	Sand and Gravel	Holderness Aggregates	Yes	East Riding	Active
North Cave	Sand and Gravel	Humber Aggregates	Yes	East Riding	Active
Park Farm	Sand and Gravel	Clifford Watts	Yes	East Riding	Active
Partridge Hall	Chalk (sold as aggregate)	Craeser Robinson	Yes	East Riding	Active

Site Name	Material	Operator name	Survey returned?	Authority	Status in 2012
Riplingham	Chalk (sold as aggregate)	Stoneledge	Yes	East Riding	Active
Slate House Farm	Limestone	Welton Aggregates	Yes	North Lincolnshire	Active
South Ferriby	Chalk (sold as aggregate)	CEMEX	Yes	North Lincolnshire	Active
Swinescaife	Chalk (sold as aggregate)	Clifford Watts	Yes	East Riding	Active
Turtle Hill	Sand and gravel	Clifford Watts	Yes	East Riding	Active

5 Marine dredged aggregate

5.1 The Crown Estate along with the British Marine Aggregate Producers Association (BMAPA) publish reserve and dredge statistics on an annual basis. The report 'Marine Aggregates The Crown Estate Licences Summary of Statistics 2013' provides summary statistics relating to the dredging and landing of marine dredged aggregate sand. Reserve information is published by The Crown Estate in the Capability and Portfolio report which for 2014 provided the following information:

- Total current primary aggregate reserves of 26.32 million tonnes off the Yorkshire and Humber coast
- 10 year average annual off-take for primary aggregate of 2.66 million tonnes
- Three year average annual off-take for primary aggregate of 1.72 million tonnes
- Annual average permitted off-take as at 31 March 2014 is 4.8 million tonnes
- Regional reserve life calculated against the 10 year average off-take is 9.9 years.

5.2 . In addition The Crown Estate and BMAPA publish a summary of the extraction activity in the Area Involved Report, the 16th of which was published in September 2014. Table 4.1 provides detail of The Humber dredging areas, Tables 4.2 and 4.3 provide removal and landing statistics for The Humber for the years 2008 to 2013.

5.3 During the 2013 monitoring period there were 10 active dredging areas operating in waters off The Humber coast.

Table 5.1 Humber marine licences and dredging areas 2013

Area no:	Licence type	Licence holder/applicant	Operational status 2013
102, 105 and 107	Active dredge areas	British Dredging	Active
106, 408 and 480	Active dredge areas	Hanson Aggregates Marine	Active
197 and 481	Active dredge areas	Tarmac Marine Dredging	Active
481	Active dredge area	Van Oord UK	Active
440/441	Active dredge area	Westminster Gravels	Active
448/449, 466/1 and 485/1-2	Area application	CEMEX UK Marine	Application
483, 484 and 506	Area application	DEME Building Materials	Application
400, 439 and 492	Area application	Hanson Aggregates Marine	Application
493	Area application	Tarmac Marine Dredging	Application
441/3	Area application	Westminster Gravels	Application

5.4 A total of 2,140,186 tonnes of material was removed from permitted dredging areas off the Humber coast during the 2013 monitoring period, the lowest level of removal for over five years and thirty per cent less than the previous five year average removal rate. Removal of primary aggregate had been steadily declining since 2008 but 2013 has seen a slight upturn, although removal rates remain less than half of that recorded for 2008. Removal of secondary beach nourishment material had been rising year on year since 2008 reaching a high of 730,033 in 2011, however removal of this material has since been reducing in 2012 and 2013 by approximately 13 and 3.5 per cent respectively. The principle reason for this reduction in removal is due to the economic recession in Europe which has historically been the significant market for material removed off the Yorkshire and Humber coast.

5.5 Of the total 2,140,186 tonnes of material removed only 502,595 tonnes was landed at permitted wharf locations in the Humber and the North East. Landings in the Humber only account for 15 per cent of this figure. Landings in the Humber have reduced during the 2013 monitoring period by approximately 16 per cent, continuing the downward trend in landings since 2008 apart from a short-term rise in 2010. However, landings outside of the Humber have increased. At Blyth landings have more than doubled and at River Tees wharves there has been an increase of approximately 35 per cent from 2012 levels. The 2014 Marine Aggregates Capability & Portfolio reported that in 2013 61 per cent of the material removed from off the Humber coast was landed in mainland Europe with only 26 per cent of the material being landed at landing locations within the Humber and North East. The remaining 13 per cent was landed in the Thames Estuary.

5.6 Further work on the potential contribution of marine aggregates to the Yorkshire and Humber region was commissioned by Leeds City Council and undertaken by URS Infrastructure and Environment UK Limited in 2013⁽²⁾. This report highlighted, amongst other things, that whilst there is more than adequate capacity in relation to permitted removal rates and reserves, there remains low levels of landings due to the presence of only one operational wharf with limited onward distribution options. It will be necessary to continue to monitor marine aggregate in future Annual Monitoring Reports and relevant Local Aggregate Assessments in order to analyse any changes in removal and landing rates.

Table 5.2 Marine dredged aggregate removed from off the Humber coast 2008 - 2013 (tonne)

The Humber		2008	2009	2010	2011	2012	2013
Primary	Primary aggregate	3,154,070	2,524,328	2,622,126	2,175,846	1,451,742	1,528,399
	Rivers & misc	-	-	-	-	-	-
Secondary	Beach nourishment	449,988	545,127	545,874	730,033	633,821	611,787
	Contract fill	-	-	18,573	-	-	-
Total aggregate removed		3,604,058	3,069,455	3,186,573	2,905,879	2,085,563	2,140,186
Authorised limit of removal (tonnes per annum)		4,400,000	5,050,000	5,050,000	5,050,000	4,800,000	4,800,000

Table 5.3 Marine dredged aggregate landed at Humber wharfs 2008 - 2013 (tonnes)

Landing point	2008	2009	2010	2011	2012	2013
Blyth	-	-	-	4,046	11,156	27,489
River Humber wharves	212,538	92,202	115,490	108,927	90,194	76,102
River Tees wharves	314,862	189,890	257,062	181,346	99,452	133,711
River Tyne wharves	508,773	314,599	362,223	247,407	337,173	265,293
Total landings	1,036,173	596,691	734,775	541,726	537,975	502,595
Total landings in the Humber	212,538	92,202	115,490	108,927	90,194	76,102

A Yorkshire & Humber AWP Membership

Yorkshire and Humber Aggregate Working Party Representatives	
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B Acronyms

Acronym	
AM	Annual Monitoring
AMR	Annual Monitoring Report
AWP	Aggregate Working Party
BAA	British Aggregates Association
BMAPA	British Marine Aggregate Producers Association
CDEW	Construction, Demolition and Excavation Waste
CLG	Communities and Local Government
HSA	High Specification Aggregate
MPA	Mineral Products Association
MPAs	Mineral Planning Authorities
NCG	National Co-Ordinating Group
NFDC	National Federation of Demolition Contractors
NPPF	National Planning Policy Framework
YHAWP	Yorkshire and Humber Aggregate Working Party

C Glossary

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

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

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

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

Licensed Dredge Area - active licenced dredge areas.

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

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