

North East England Annual Aggregates Monitoring Report 2014



**Published
March 2016**

North East Aggregates Working Party

County Durham | Northumberland | Tees Valley | Tyne and Wear

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Executive Summary

This report has been prepared by the North East Aggregates Working Party and presents statistical information on sales of aggregate minerals from North East England in 2014 and the permitted reserves of aggregate minerals at 31 December 2014. The report also provides information on planning applications relating to the extraction of minerals for aggregate use and sales of recycled and secondary aggregates.

North East Aggregates Working Party

- The North East Aggregates Working Party covers a cluster of thirteen Mineral Planning Authorities in North East England over the sub-regional areas of County Durham, Northumberland, Tees Valley and Tyne and Wear.
- The North East Aggregates Working Party is one of a number of similar groups throughout England and Wales. Its membership is made up of the Mineral Planning Authorities in North East England and the aggregates industry. The Aggregates Working Party has a role in helping to plan for a steady and adequate supply of aggregate minerals through providing data on sales, reserves and planning permissions for aggregate minerals and providing technical advice on the supply and demand for aggregates from their areas.

Primary aggregate sales and reserves

- Sales of primary aggregates from North East England in 2014 were 5.6 million tonnes (see table below). Sales included 4.2 million tonnes of crushed rock, 873,000 tonnes of land-won sand and gravel and 537,000 tonnes of marine-dredged sand and gravel.
- Sales of primary aggregates from North East England increased by 18% in 2014 but, despite this increase, sales are still significantly lower (29%) than the sales levels in 2007 prior to economic downturn. The increase in sales from 2013 to 2014 includes a 17% increase in sales of crushed rock, a 22% increase in sales of land-won sand and gravel and a 17% increase in sales of marine-dredged sand and gravel.
- The main report provides a breakdown of sales by end-use and sub-region.

Table ES1: Primary aggregates sales from North East England, 2005 to 2014 (thousand tonnes)

Year	Crushed rock	Land won sand and gravel	Marine sand and gravel	Total primary aggregates
2005	5,740	1,360	1,049	8,149
2006	5,652	1,325	1,142	8,119
2007	5,689	1,037	1,132	7,858
2008	5,079	926	998	7,003
2009	3,379	757	563	4,699
2010	3,469	757	678	4,904
2011	3,433	869	509	4,812
2012	3,181	713	491	4,385
2013	3,569	716	451	4,736
2014	4,162	873	537	5,572

- At 31 December 2014, North East England had 18.2 million tonnes of permitted sand and gravel reserves and 219.1 million tonnes of permitted crushed rock reserves.
- This equated to a landbank of 14.0 years for sand and gravel and a landbank of 40.6 years for crushed rock when calculated using the provision set out in the relevant Local Aggregates Assessments. These landbank figures are above the landbank indicator of 7 years for sand and gravel and the landbank indicator of 10 years for crushed rock that is set out in the National Planning Policy Framework.

Table ES2: Permitted reserves and landbank of primary aggregates in North East England at 31 December 2014

	Permitted reserves	Landbank ¹
Sand and gravel	18.2 million tonnes	14.0 years
Crushed rock	219.1 million tonnes	40.6 years

¹ Landbank calculated using provision set out in Local Aggregates Assessments or adopted Local Plans.

Planning applications for the extraction of primary aggregates

- Approvals – one planning application for the extraction of additional crushed rock reserves was granted in North East England during 2014. This involves the proposed extraction of 1.1 million tonnes of igneous rock from a vertical and lateral extension to Harden Quarry in Northumberland National Park. In addition to this, the extraction of a combined 25,000 tonnes of crushed rock from three separate borrow pit sites in County Durham was granted in 2014. No additional reserves of sand and gravel were granted planning permission for extraction in North East England in 2014.
- Refusals – No planning applications for the extraction of additional reserves of primary aggregates were refused planning permission in North East England during 2014.
- Pending – Planning applications potentially involving the extraction of 13.7 million tonnes of crushed rock and 6.5 million tonnes of sand and gravel were pending determination at 31 December 2014.

Table ES3: Quantities of primary aggregates subject to planning applications in North East England in 2014 (thousand tonnes)

	Crushed rock			Sand and gravel		
	Granted	Refused	Pending	Granted	Refused	Pending
County Durham	25	0	7,750	0	0	0
Northumberland	1,100	0	0	0	0	0
Tees Valley	0	0	0	0	0	0
Tyne and Wear	0	0	6,000	0	0	6,550
North East England	1,125	0	13,750	0	0	6,550

Recycled and secondary aggregates sales

- The 2014 survey of fixed construction and demolition recycling facilities and secondary aggregates producers found 1.2 million tonnes of recycled and secondary aggregate were sold from North East England in 2014.
- Sources of recycled and secondary aggregates included construction and demolition waste, spent road planings, ash from the Lynemouth Power Station in Northumberland and the Haverton Hill Energy from Waste Plant on Teesside and materials originating from the steelworks at Redcar.
- This recycled and secondary aggregates sales figure for 2014 should be treated with some degree of caution as not all producers in North East England responded to the survey and have thus not been included in the figures. In addition, the survey does not include mobile crushers and screens which are

known to make a significant contribution in terms of the quantities of construction and demolition waste recycled for aggregate uses.

1. Introduction

1.1 The North East Aggregates Working Party is one of a number of similar working parties throughout England and Wales originally established in the 1970s to collect data and monitor the production and supply of aggregate minerals, the reserves of aggregate minerals covered by valid planning permissions and provide technical advice on the supply and demand for aggregates from their areas. The aggregates working parties are a joint local government, central government and industry body. Funding for the secretariat is provided by Department for Communities and Local Government but the members of the Aggregates Working Party provide their time on a voluntary basis.

1.2 There are thirteen mineral planning authorities in North East England Aggregates Working Party cluster area (see Figure 1.1). This includes seven unitary authorities, five metropolitan borough authorities and one National Park authority in four sub-regional clusters:

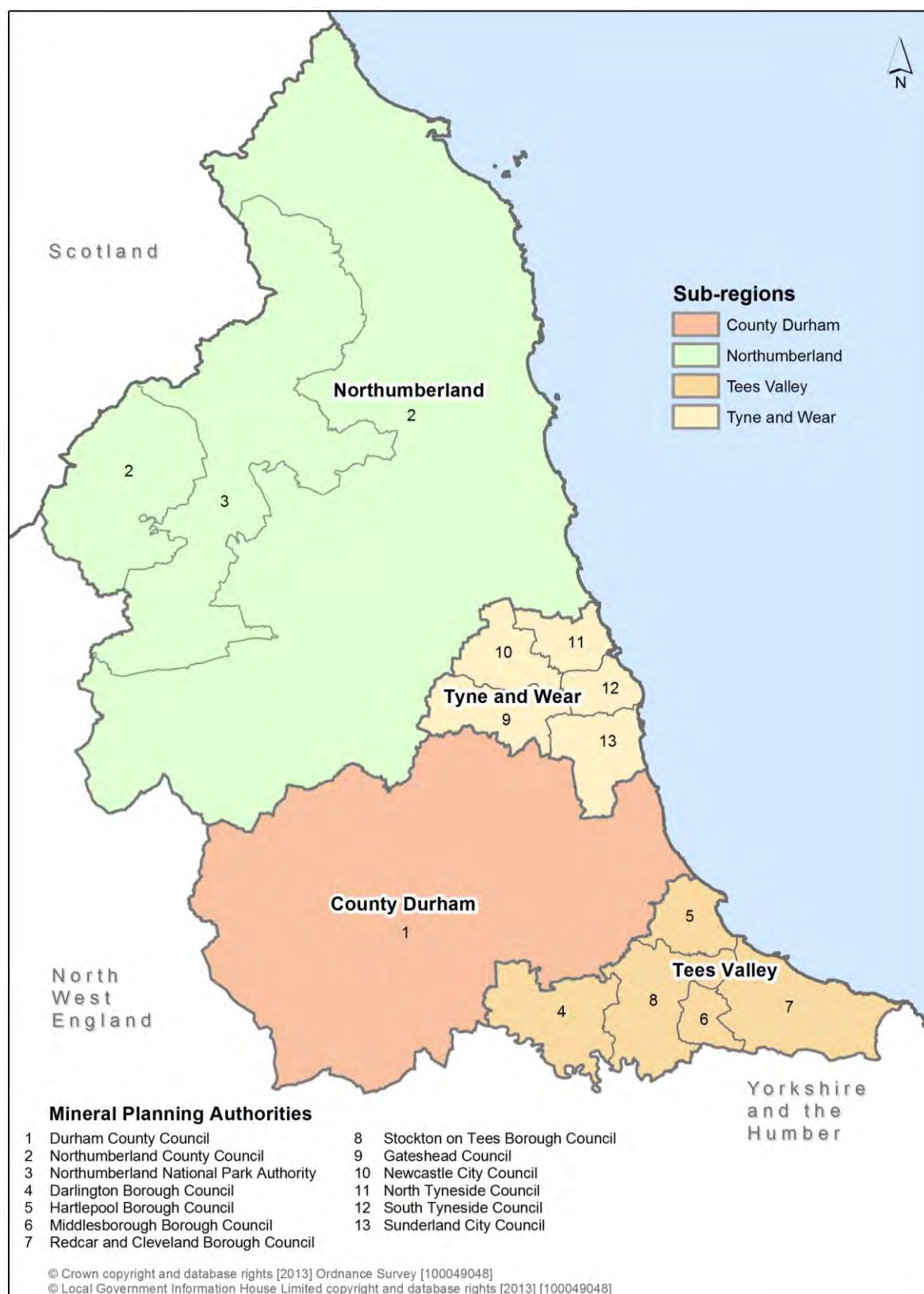
- County Durham (Durham County Council);
- Northumberland (Northumberland County Council and Northumberland National Park Authority);
- Tees Valley (Darlington Borough Council, Hartlepool Borough Council, Middlesbrough Council, Redcar and Cleveland Borough Council and Stockton on Tees Borough Council); and
- Tyne and Wear (Gateshead Council, Newcastle City Council, North Tyneside Council, South Tyneside Council and Sunderland City Council).

1.3 The North East England Aggregates Working Party cluster covers around 850,000 hectares between the Scottish Borders to the north, North West England to the west, Yorkshire and Humber to south and the North Sea to the east. The area has a population of over 2.5 million, primarily concentrated in the two conurbations of Tyne and Wear and Tees Valley. The remainder of North England is mostly rural in character and sparsely populated.

1.4 The distinctiveness and special nature of the environment and landscape is recognised with a number of national designations. This includes the Northumberland National Park, Northumberland Coast Area of Outstanding Natural Beauty and the North Pennines Area of Outstanding Natural Beauty.

1.5 In North East England a wide variety of mineral resources are found and extracted. The most important primary aggregate resources are Carboniferous limestone, magnesian limestone, igneous rock, Permian sand and glacial and fluvial sand and gravel.

Figure 1.1: North East Aggregates Working Party area



1.6 This report presents information for North East England on sales of primary aggregates in 2014, permitted reserves of primary aggregates as at 31 December 2014 and the quantity of aggregate minerals granted and refused planning permission in 2014. Information relating to the production and use of recycled and secondary aggregates is also provided. In addition, this report gives an update of progress with the preparation of development plans applicable to minerals.

1.7 Detailed information from the previous aggregates monitoring surveys covering North East England can be found in previous Annual Aggregates Monitoring Reports produced by the North East Aggregates Working Party. The Aggregates Monitoring Survey for 2014 was part of a more comprehensive national survey that are usually undertaken every four years² by the Department for Communities and Local Government. The aim of the survey was to provide an in-depth and up-to-date understanding of regional and national sales, inter-regional flows, transportation and permitted reserves of primary aggregates. A report collating the results of the national survey will be available to view on the website of the Department for Communities and Local Government in due course.

² There has been a five year period between the 2014 national survey and the previous survey in 2009.

2. Planning policy context

2.1 Planning policy for aggregate minerals is contained in the National Planning Policy Framework (NPPF) (March 2012). The NPPF recognises that minerals are essential to economic growth and quality of life and that it is important that there is a sufficient supply of minerals to deliver the infrastructure and buildings the country needs.

2.2 The approach to planning for aggregate minerals is underpinned by a Managed Aggregates Supply System (MASS). This seeks to ensure there is a steady and adequate supply of aggregate minerals to meet the needs of the construction industry and ensure the geographical imbalances between the occurrence of suitable aggregates and the areas where most demand arises are appropriately addressed at the local level. For example, in North East England, County Durham and Northumberland are net exporters of aggregates to the more urban areas of Tyne and Wear and Tees Valley, where suitable aggregate mineral resources are less abundant.

2.3 One of the key elements of the MASS involves the preparation of an annual Local Aggregate Assessment by each Mineral Planning Authority. The Local Aggregate Assessments are expected to forecast demand based on a rolling average of 10 years sales data, supply options, the balance between supply and demand and the environmental and economic constraints and opportunities that could influence supply. The Local Aggregate Assessment should also to indicate whether there is a surplus or shortage of supply and if there is a shortage how this is being addressed.

2.4 National and sub-national guidelines for the provision of aggregate minerals are also published by central government to provide an indication of the total amount of aggregate the Mineral Planning Authorities, collectively within each AWP cluster, should aim to provide. While there is no expectation that each AWP should meet the guidelines, particularly if the environmental cost of doing so is likely to be unacceptable, the guidelines are a material consideration when determining the soundness of minerals plans and in making decisions on planning applications. The most up-to-date guidelines for aggregates provision were published in June 2009 and are shown in Table 2.1.

2.5 This current approach differs from way the MASS operated in the past. Previously the MASS had more of a 'top-down' approach and involved central Government issuing national and sub-national guidelines for aggregates provision, based on forecasts of demand for aggregate minerals, with the AWPs then providing technical advice on how these guidelines should be apportioned to each mineral planning authority in their area. The mineral planning authorities were then expected to make provision for this apportionment in their local plan. The approach to MASS was amended to reflect the Government's more localist approach to planning matters.

Table 2.1: National and regional guidelines for aggregates provision in England, 2005 to 2020 (million tonnes)

	Guidelines for land-won production		Assumptions		
	Sand and gravel	Crushed rock	Marine-dredged sand and gravel	Alternative materials	Net imports to England
South East England	195	25	121	130	31
London	18	0	72	95	12
East of England	236	8	14	117	7
East Midlands	174	500	0	110	0
West Midlands	165	82	0	100	23
South West England	85	412	12	142	5
North West England	52	154	15	117	55
Yorkshire Humber	78	212	5	133	3
North East England	24	99	20	50	0
England	1,028	1,492	259	993	136

3. Production and reserves of primary aggregates: Crushed rock

Overview

3.1 This chapter sets out information on sales and permitted reserves of crushed rock in North East England. Information is also presented on planning applications for crushed rock extraction for aggregate use.

Sites producing crushed rock

3.2 There were nineteen quarries producing crushed rock aggregate in North East England in 2014 (see Table 3.1 below). In addition to these active sites, a further eight quarries were ‘inactive’³. This includes quarries that have been mothballed or have gained planning consent for extraction but extraction has yet to commence. Extraction and aggregates production at Aycliffe Quarry in County Durham ceased in 2013. Further details of both the active and inactive sites are provided in Appendix 1.

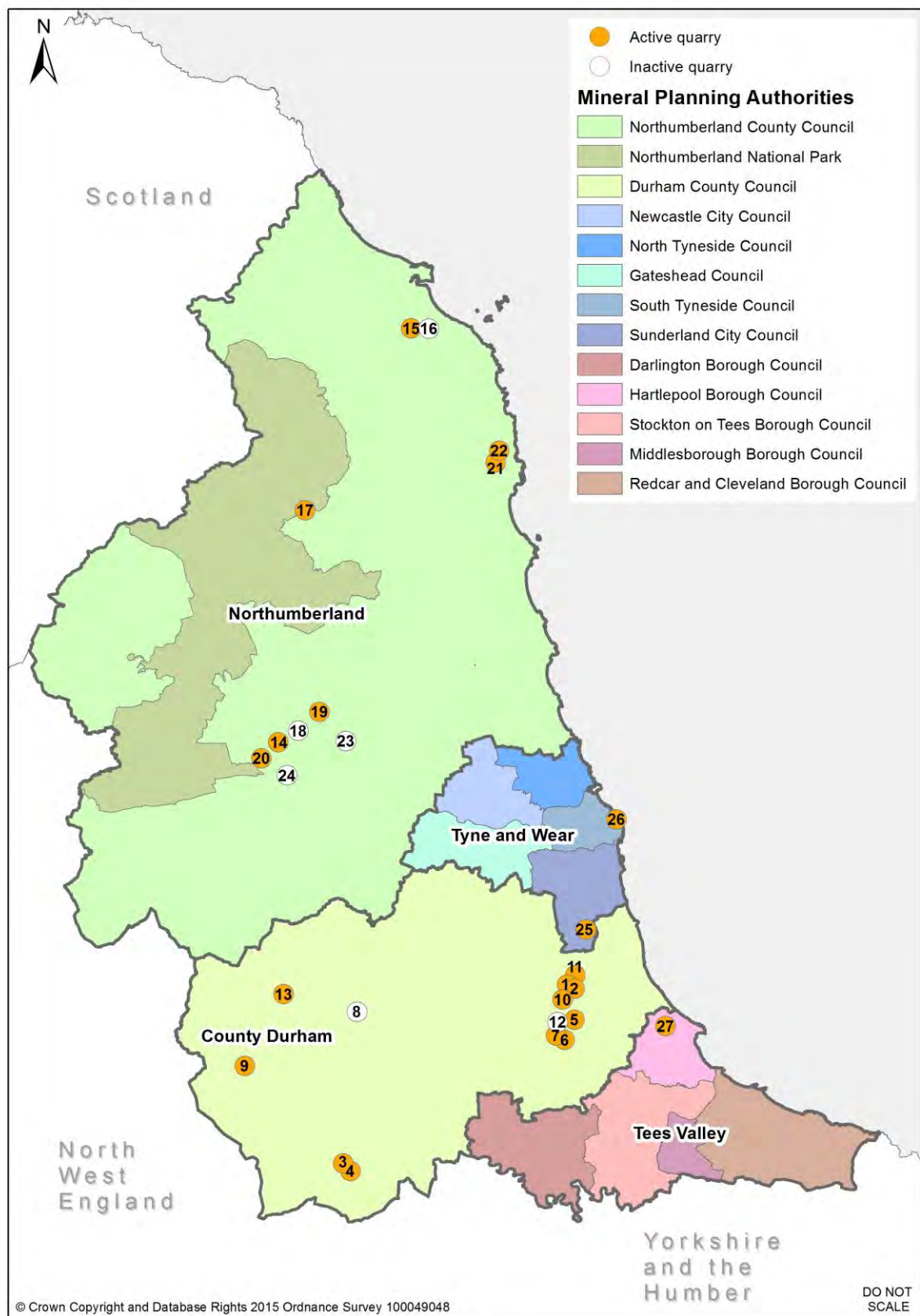
Table 3.1: Crushed rock aggregate sites in North East England, 2014

Sub-area	Active sites in 2014	Inactive sites in 2014
County Durham	<ul style="list-style-type: none"> • Bishop Middleham Quarry (6) • Coxhoe (Raisby) Quarry (7) • Crime Rigg Quarry (11) • Heights Quarry (13) • Hulands Quarry (3) • Kilmond Wood Quarry (4) • Middleton (Force Garth) Quarry (9) • Old Quarrington Quarry (10) • Thrislington Quarry (7) 	<ul style="list-style-type: none"> • Broadwood Quarry (8) • Cornforth Quarry (12) • Running Waters Quarry (1) • Witch Hill Quarry (2)
Northumberland	<ul style="list-style-type: none"> • Barrasford Quarry (14) • Cragmill Quarry (15) • Divethill Quarry (19) • Harden Quarry (17) • Howick Quarry (22) • Keepersfield Quarry (20) • Longhoughton (Ratcleugh) Quarry (21) 	<ul style="list-style-type: none"> • Belford (Easington) Quarry (16) • Cocklaw Quarry (24) • Mootlaw Quarry (23) • Swinburne Quarry (18)
Tees Valley	<ul style="list-style-type: none"> • Hart Quarry (27) 	
Tyne and Wear	<ul style="list-style-type: none"> • Eppleton Quarry (25) • Marsden Quarry (26) 	

Notes: (1) – Numbers relate to the corresponding numbers shown on the map in Figure 3.2

³ The definition of ‘inactive’ sites only includes sites that have a valid planning permission and does not include dormant sites or sites that do not have a valid planning permission.

Figure 3.2: Crushed rock aggregate quarries in North East England



Crushed rock sales

3.3 Information on sales of crushed rock from quarries in North East England in 2014, along with sales in previous monitoring periods, is provided in Table 3.3. Sales from North East England in 2014 were 4.2 million tonnes. 64% of sales were from quarries in County Durham, 28% were from quarries in Northumberland and the remaining 8% of sales was from sites in Tees Valley and Tyne and Wear.

3.4 Sales of crushed rock decreased by 41% between 2007 (5.7 million tonnes) and 2009 (3.3 million tonnes). This decrease is considered to be mainly a result of the economic downturn and a resulting reduction in demand for primary aggregates. Following a significant decrease in sales in 2009, sales of crushed rock for aggregate use from North East England remained at a broadly similar level in the period from 2009 to 2013 reflecting the economic conditions. However, sales increased by 17% from 2013 (3.6 million tonnes) to 2014 (4.2 million tonnes) reflecting growth in construction activity. Nonetheless it is recognised that this increase in sales is still significantly lower than sales levels prior to the economic downturn.

Table 3.3: Sales of crushed rock for aggregate use from North East England, 2005 to 2015 (thousand tonnes)

Year	County Durham	Northumberland	Tyne and Wear	Tees Valley	North East England
2005	3,777	1,696	83	184	5,740
2006	3,384	1,796	#	#	5,652
2007	3,559	1,676	#	#	5,689
2008	3,036	1,664	#	#	5,079
2009	1,920	1,153	#	#	3,379
2010	2,056	1,188	#	#	3,462
2011	1,955	1,230	#	#	3,433
2012	1,696	1,233	#	#	3,181
2013	2,245	1,060	#	#	3,569
2014	2,654	1,171	#	#	4,162
Ten year sales average	2,628	1,387	No figure available	No figure available	4,335

Notes:

Confidential figure included in the figure for North East England

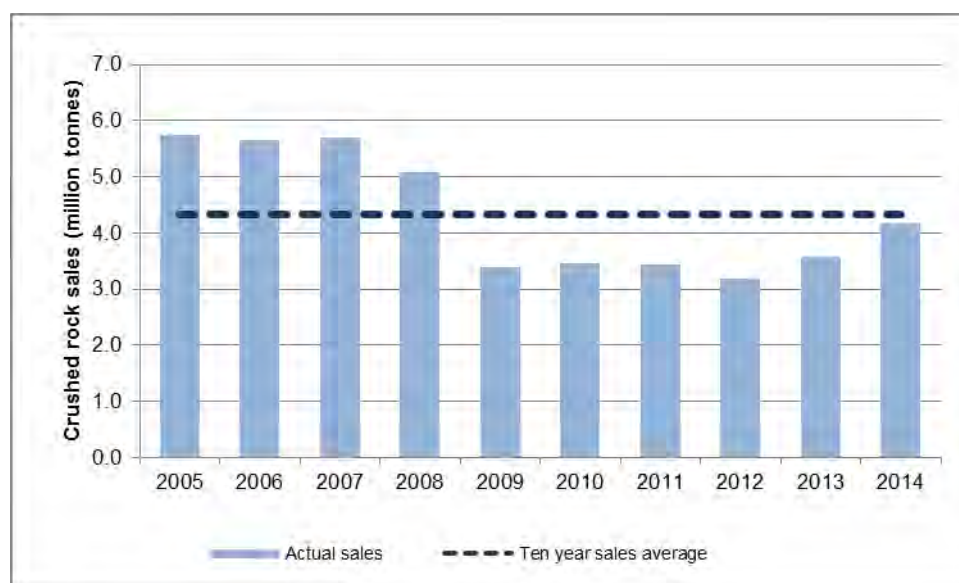
3.5 The sales of crushed rock by broad end-use product categories and mineral type are shown in Table 3.4. These end-use figures should be treated with some caution as, although operators know what products they sell, they cannot always be certain what the products will ultimately be used for. The crushed rock extracted in North East England has a wide range of end-uses and this can vary depending on mineral type. Other constructional use (25%), uncoated roadstone (24%), other screened and graded aggregates (19%), concrete aggregate (16%), and coated roadstone (14%) represent the main end-uses for aggregates from quarries in North East England in 2014.

Table 3.4: Sales of crushed rock for aggregate use in North East England by mineral resource and end-use, 2014 (tonnes)

	Carboniferous limestone	Magnesian limestone	Igneous rock	Total crushed rock
Coated roadstone	156,066	0	112,924	268,990
Roadstone to be coated	24,657	4,520	280,974	310,151
Uncoated roadstone (Type 1 and Type 2)	113,896	709,229	187,581	1,010,976
Uncoated roadstone (surface chippings)	0	0	20,324	20,324
Rail ballast	0	0	4,716	4,716
Concrete aggregate	106,940	453,937	104,467	665,344
Other screened/graded	21,765	551,391	226,071	779,227
Armour/gabion stone	16,516	31,229	16,656	64,401
Other constructional use	225,704	465,261	327,173	1,018,138
Total	665,544	2,215,567	1,281,156	4,162,267

3.6 A comparison between actual sales of crushed rock from North East England and the ten year sales average is shown in Figure 3.5. The ten year sales average, covering the period from 2005 to 2014, for crushed rock from North East England is 4,335,000 tonnes. Sales of crushed rock over the period between 2009 and 2014 are below this ten year sales average, following a significant reduction in sales compared to sales prior to 2008. As stated above, it is considered that sales have fallen below the ten year sales average in recent monitoring periods due to the economic downturn and a reduction in construction activity.

Figure 3.5: Comparison of actual sales of crushed rock from North East England and the ten year sales average, 2005 to 2014



3.7 In addition to sales from quarries in North East England, a contribution to crushed rock supply was made via imports of crushed rock to wharf sites. In 2014 48,614 tonnes of crushed rock from Glensanda Quarry in Scotland was imported via Battleship Wharf in Northumberland and 99,762 tonnes of crushed rock from Norway was imported via Greenwells Quay in Sunderland.

Crushed rock reserves

3.8 The permitted reserves of crushed rock at quarries in North East England at 31 December 2014 were 219.1 million tonnes (Table 3.6). This represents a decrease in permitted reserves from 2013. This decrease takes account of sales in 2014 but the decrease in reserves is below the level of the 2014 sales due mainly to planning permission being granted for an extension to Harden Quarry in Northumberland National Park involving 1.1 million tonnes of crushed rock and an increase in the reported reserves at the inactive Swinburne Quarry in Northumberland. A large proportion of the permitted reserves of crushed rock in North East England are found at quarries in County Durham (63.1%) and Northumberland (35.6%), with only a small proportion found at the sites in Tees Valley and Tyne and Wear (1.3%).

Table 3.6: Permitted reserves of crushed rock at quarries in North East England, 2005 to 2014 (thousand tonnes)

Year*	County Durham	Northumberland	Tees Valley	Tyne and Wear	North East England
2005	144,875	76,056	4,100	3,918	228,950
2006	174,647	79,986	#	#	257,298
2007	140,563	78,385	#	#	221,506
2008	136,326	78,422	#	#	216,986
2009	137,893	76,433	#	#	216,555
2010	135,205	79,098	#	#	216,469
2011	136,734	78,004	#	#	218,249
2012	134,065	77,264	#	#	214,528
2013	140,732	76,643	#	#	220,373
2014	138,346	77,972	#	#	219,117

Notes:

* Reserves at 31 December

Confidential figure included in the figure for North East England

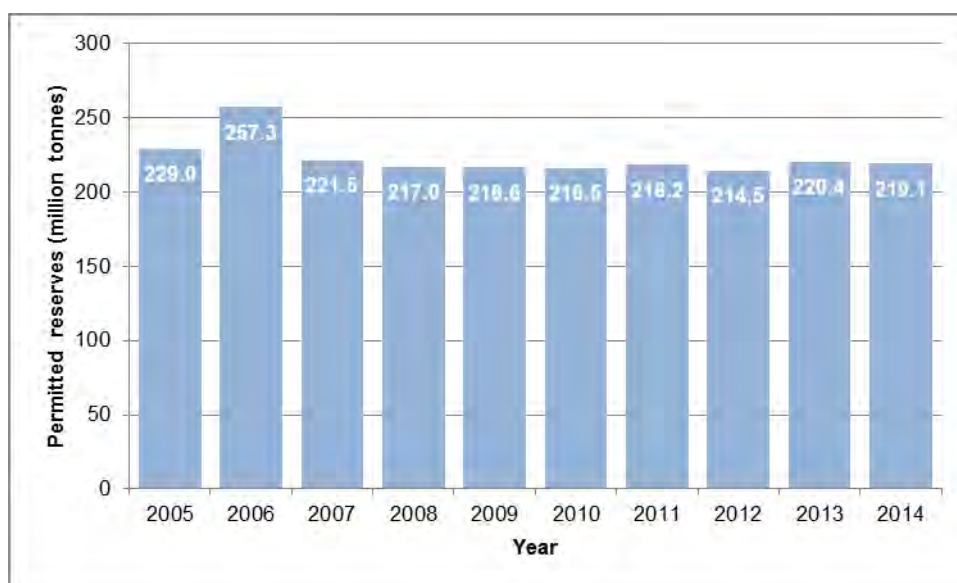
3.9 The permitted reserves of crushed rock in North East England by resource type are shown in Table 3.7. The most significant resources in terms of their contribution to the total permitted reserves in North East England are magnesian limestone (52.2%) and igneous rock (40.0%). The remaining permitted reserves are Carboniferous limestone (7.8%). The reserves of magnesian limestone are mainly concentrated in County Durham, while the reserves of igneous rock are mainly concentrated in Northumberland.

Table 3.7: Permitted reserves of crushed rock at quarries in North East England by mineral resource, at 31 December 2014 (tonnes)

Carboniferous limestone	Magnesian limestone	Igneous rock	Total crushed rock
16,983,000	114,531,783	87,601,715	219,116,498

3.10 A comparison of the level of permitted over the last ten monitoring periods is shown in Figure 3.8.

Figure 3.8: Comparison of permitted reserves of crushed rock at quarries in North East England, 31 December 2005 to 31 December 2014



Crushed rock landbank

3.11 The National Planning Policy Framework (Paragraph 145) states that Mineral Planning Authorities should use the length of the landbank in their area to indicate the additional provision that needs to be made for new aggregates extraction. It specifies that the landbank indicator is at least 10 years for crushed rock.

Table 3.9: Landbank of permitted crushed rock reserves in North East England as at 31 December 2014

	County Durham	Northumberland	Tees Valley	Tyne and Wear	North East England
Reserves at 31 December 2014 (tonnes)	138,345,498	77,971,715	#	#	219,116,498
Annual provision (tonnes)	3,196,675*	1,686,675*	187,500 ⁺	329,412*	5,400,262
Landbank at 31 December 2014 (years)	43.3	46.2	#	#	40.6

Notes:

- Reserve and landbank figures for Tees Valley and Tyne and Wear have not been published due to the small number of sites in these areas and the requirement not to disclose confidential individual site information.

* - Figure taken from Joint Local Aggregates Assessment for County Durham, Northumberland and Tyne and Wear.

⁺ - Figure taken from Joint Local Aggregates Assessment for Tees Valley.

3.12 The landbanks for sand and gravel have been calculated using the provision set out in the most up-to-date Local Aggregates Assessments or adopted Local Plans. The landbank of permitted reserves in North East England at 31 December 2014 and the landbanks for the four sub-regions are shown in Table 3.9. North East England had a crushed rock landbank of 40.6 years at 31 December 2014. This is above the landbank indicator of 7 years as set out in the National Planning Policy Framework.

Planning applications for crushed rock extraction

3.13 The North East Aggregates Working Party monitors the nature and outcome of planning applications for aggregates extraction in North East England on an annual basis. Table 3.10 details the quantities of crushed rock granted or refused planning permission for extraction between 1 January 2014 and 31 December 2014 and the quantities in planning applications that were pending determination at 31 December 2014. Further detail on each of the planning applications is shown in Appendix 3.

3.14 During 2014 a planning application for a lateral and vertical extension to Harden Quarry in Northumberland National Park was granted planning permission involving the extraction of 1.1 million tonnes of crushed rock. In addition, three planning applications for borrow pits to provide aggregate materials for the upgrading of moorland access tracks (Cootherstone Moor, 7,424 tonnes of sandstone; Harnisha Crag, 8,000 tonnes of Carboniferous limestone; and Nookton Fell, 10,000 tonnes of sandstone) were granted in County Durham. No planning applications for crushed rock extraction were refused planning permission during 2014 in North East England.

3.15 At 31 December 2014, a further three planning applications were pending determination involving the potential extraction of 13.75 million tonnes of rock for aggregate uses. This includes an application for an extension at Eppleton Quarry within the Tyne and Wear sub-area (6 million tonnes of magnesian limestone) and two applications for the reactivation of dormant planning permissions at quarries in County Durham (4 million tonnes of Carboniferous limestone and 3.75 million tonnes of magnesian limestone).

Table 3.10: Quantities of crushed rock subject to planning applications in the North East England during 2014 (thousand tonnes)

	Granted	Refused	Pending
County Durham	25	0	7,750
Northumberland	1,100	0	0
Tees Valley	0	0	0
Tyne and Wear	0	0	6,000
North East England	1,125	0	13,750

Notes:

Reserve information collected from planning application submissions

Does not include reserves subject to applications to extend the time period for extraction

4. Production and reserves of primary aggregates: land won sand and gravel

Overview

4.1 This chapter sets out information on sales and permitted reserves of sand and gravel in North East England. Information is also presented on planning applications for sand and gravel extraction for aggregate use.

Sites producing sand and gravel

4.2 In 2014 there were nine quarries in North East England producing land-won sand and gravel for aggregate use (see Table 4.1 below). In addition to these active sites, a further six quarries were 'inactive'⁴ in 2014. This includes quarries that have been mothballed and quarries that have gained planning consent for extraction but extraction has yet to commence. The latter is the case for Hummerbeck and Low Harperley quarries in County Durham. Extraction at Hollings Hill Quarry in Northumberland ceased during 2013. Further details of the both active and inactive sites are provided in Appendix 1.

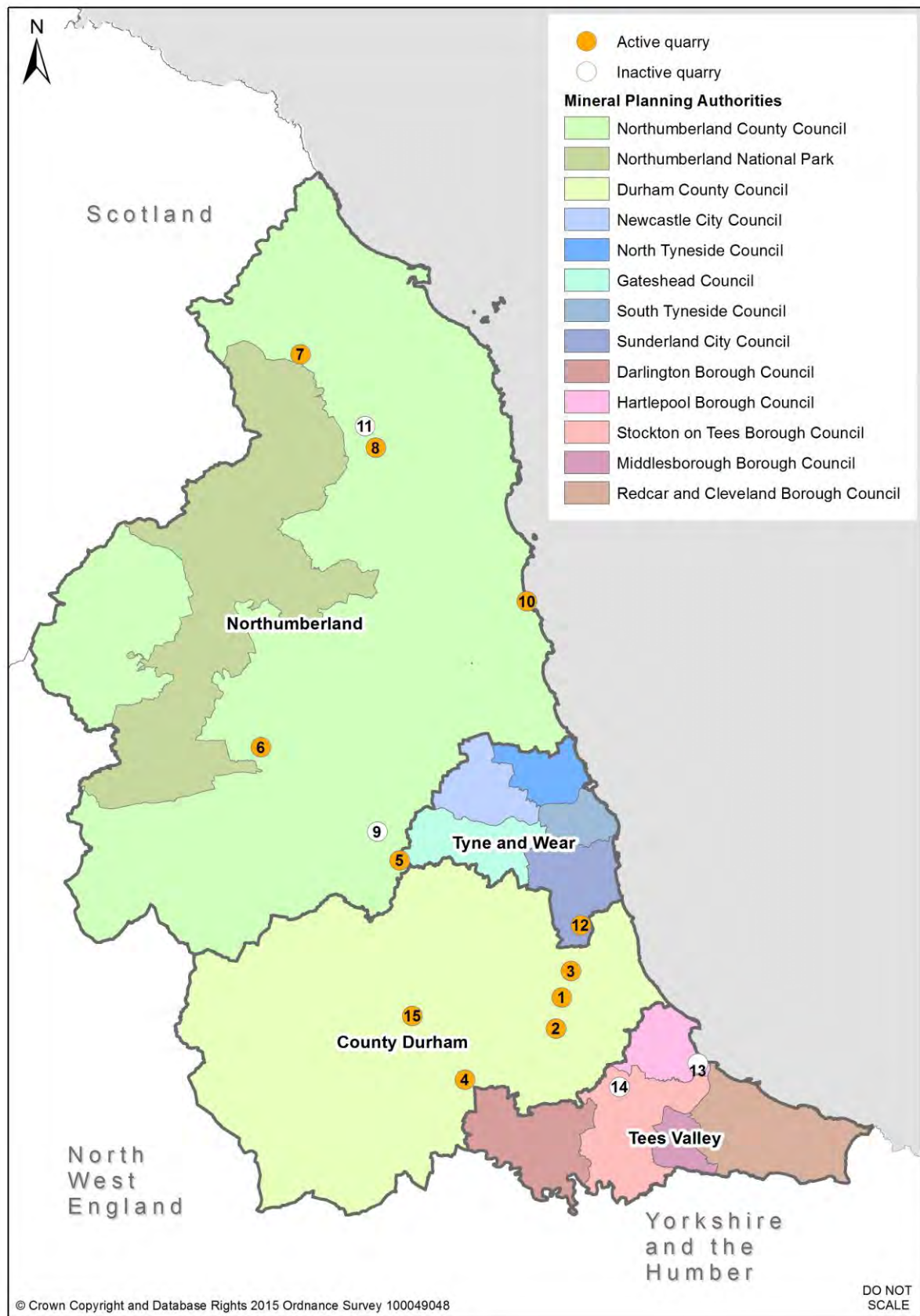
Table 4.1: Sand and gravel aggregate quarries in North East England, 2014

Sub-area	Active sites in 2014	Inactive sites in 2014
County Durham	<ul style="list-style-type: none">• Crime Rigg Quarry (3)• Old Quarrington Quarry (1)• Thrislington Quarry (2)	<ul style="list-style-type: none">• Hummerbeck Quarry (4)• Low Harperley Quarry (15)
Northumberland	<ul style="list-style-type: none">• Ebchester (Broadoak) Quarry (5)• Haughton Strother Quarry (6)• Hedgeley Quarry (8)• Hemscott Hill Beach (10)• Lanton (Cheviot) Quarry (7)	<ul style="list-style-type: none">• Merryshields Quarry (9)• Wooperton Quarry (11)
Tees Valley		<ul style="list-style-type: none">• Hartlepool Beach (13)• Stockton (Thorpe Thewles) Quarry (14)
Tyne and Wear	<ul style="list-style-type: none">• Eppleton Quarry (12)	

Notes: (1) – Numbers relate to the corresponding numbers shown on the map in Figure 4.2

⁴ The definition of 'inactive' sites only includes sites that have a valid planning permission and does not include dormant sites or sites that do not have a valid planning permission.

Figure 4.2: Sand and gravel aggregate quarries in North East England



Sand and gravel sales

4.3 Information on sales of land-won sand and gravel from quarries in North East England in 2014, along with sales from previous monitoring periods, is provided in Table 4.3. In 2014 sales of land-won sand and gravel increased by 22% when compared to sales in 2013. This increase is as a result of growth in construction activity in 2014 but the sales levels are still significantly lower than those prior to the economic downturn. Table 4.3 shows that between 2007 (1,037,000 tonnes) and 2009 (757,000 tonnes) sales decreased by 27% mainly as a consequence of the economic downturn and a resulting decrease in demand for primary aggregates. Following the significant decrease in sales between 2007 and 2009, sales remained at a similar level in the period from 2009 to 2013 reflecting the economic conditions over that period.

Table 4.3: Sales of sand and gravel for aggregate use from North East England, 2005 to 2014 (thousand tonnes)

Year	County Durham	Northumberland	Tees Valley	Tyne and Wear	North East England
2005	431 [†]	576	*	353	1,360
2006	391 [†]	505	*	409	1,305
2007	221 [†]	574	*	241	1,037
2008	183	515	#	#	926
2009	199	425	#	#	757
2010	164	402	#	#	757
2011	237	450	#	#	869
2012	199	349	0	#	713
2013	218	320	0	#	716
2014	276	361	0	#	873
Ten year sales average	246+	448	Figure not available	Figure not available	931

Note:

Confidential figure included in the sales figure for North East England

* Confidential figure included in the sales figure for County Durham figure

[†] Includes sales from Tees Valley

+ Estimate due to actual sales for 2005, 2006 and 2007 being combined with Tees Valley

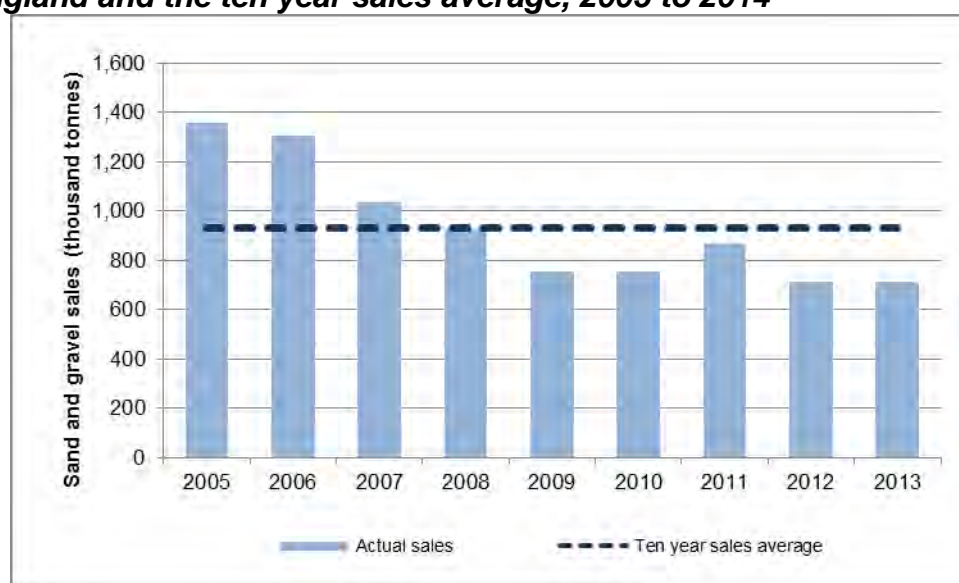
4.4 The sales of land-won sand and gravel by broad end-use product categories are shown in Table 4.4. These end-use figures should be treated with some degree of caution as, although operators know what products they sell, they cannot always be certain what the products will ultimately be used for. Concreting sand and sand for use in mortar were the largest products for land won sand and gravel sales in 2014 with each accounting for around 33% of sales for aggregate use.

Table 4.4: Sales of land-won sand and gravel for aggregates by end-use from North East England in 2014 (tonnes)

End-use	Land won sand and gravel sales (tonnes)
Sand for asphalt	104,197
Sand for use in mortar	287,124
Concreting and sharp sand	291,676
Gravel for asphalt	0
Gravel for concrete aggregate	81,520
Other screened/graded gravel	52,923
Other sand and gravel	55,448
Total sand and gravel	872,888

4.5 A comparison between actual sales of land-won sand and gravel in North East England and the ten year sales average is shown in Figure 4.5. The ten year average sales of land-won sand and gravel from North East England for the period from 2005 to 2014 is 931,300 million tonnes. Sales in 2014 were 872,888 tonnes, which is below the ten year sales average by around 60,000 tonnes. Sales of land-won sand and gravel over the period between 2008 and 2014 are below the ten year sales average, following a significant reduction in sales over this period in comparison with sales prior to 2008. Sales have fallen below the ten year sales average due to a reduction in demand as a result of the economic downturn and a reduction in construction activity.

Figure 4.5: Comparison of actual sales of land-won sand and gravel from North East England and the ten year sales average, 2005 to 2014



Permitted reserves of sand and gravel

4.5 The permitted reserves of sand and gravel in North East England at 31 December 2014 were 18.2 million tonnes (Table 4.6).

Table 4.6: Permitted reserves of sand and gravel at quarries in North East England, 2004 to 2013 (thousand tonnes)

Year	County Durham	Northumberland	Tees Valley	Tyne and Wear	North East England
2005	5,371 [†]	9,246	*	2,278	16,895
2006	2,752	9,629	2,500	1,429	16,310
2007	2,296	8,913	2,278	1,199	14,686
2008	2,093	8,551	#	#	13,705
2009	3,715	8,051	#	#	15,323
2010	3,483	9,538	#	#	16,507
2011	4,607	8,969	#	#	16,173
2012	6,679	8,331	#	#	17,551
2013	8,924	7,728	#	#	20,220
2014	8,651	7,414	#	#	18,198

Notes:

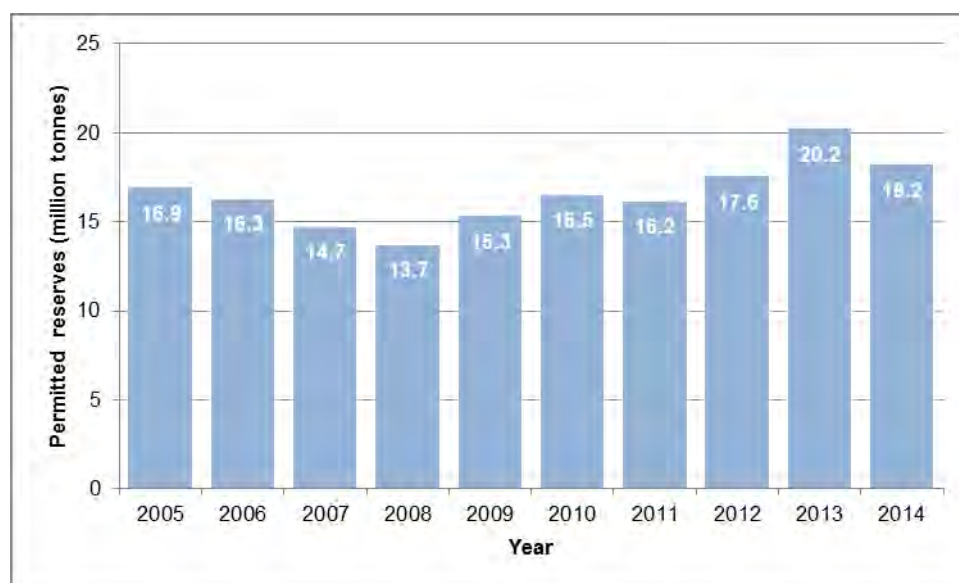
Confidential figure included in the figure for North East England

* Confidential figure included in Durham figure

[†] Includes reserve figure for Tees Valley

4.6 A comparison of the level of permitted over the last ten monitoring periods is illustrated in Figure 4.7. There has been a general decline in level of permitted reserves at quarries in North East England since 2005 and beyond. It is also observed that reserves have increased from a low of 13.7 million tonnes in 2008 and from 2010 to 2014 reserves have been consistently in excess of 16 million tonnes.

Figure 4.7: Comparison of permitted reserves of sand and gravel at quarries in North East England, 31 December 2005 to 31 December 2014



Sand and gravel landbank

4.7 The National Planning Policy Framework (Paragraph 145) states that Mineral Planning Authorities should use the length of the landbank in their area to indicate the additional provision that needs to be made for new aggregates extraction. It specifies that the landbank indicator is at least 7 years for sand and gravel.

Table 4.8: Landbank of permitted sand and gravel reserves in North East England as at 31 December 2014

	County Durham	Northumberland	Tees Valley	Tyne and Wear	North East England
Reserves at 31 December 2014 (tonnes)	8,650,560	7,414,000	#	#	18,197,560
Annual provision (tonnes)	299,000*	550,000*	175,000 ⁺	270,000*	1,294,000
Landbank at 31 December 2014 (years)	28.9	13.5	#	#	14.0

Notes:

- Reserve and landbank figures for Tees Valley and Tyne and Wear have not been published due to the small number of sites in these areas and the requirement not to disclose confidential individual site information.

* - Figure taken from Joint Local Aggregates Assessment for County Durham, Northumberland and Tyne and Wear.

⁺ - Figure taken from Joint Local Aggregates Assessment for Tees Valley.

4.8 The landbanks for sand and gravel have been calculated using the provision set out in the most up-to-date Local Aggregates Assessments. The landbank of permitted reserves in North East England at 31 December 2014 and the landbanks for the four sub-regions are shown in Table 3.9. North East England had a sand and gravel landbank of 14.0 years at 31 December 2013. This is above the landbank indicator of 7 years as set out in the National Planning Policy Framework.

Planning applications for sand and gravel extraction

4.10 The North East Aggregates Working Party monitors the nature and outcome of planning applications for aggregates extraction in North East England on an annual basis. Table 4.9 details the quantities of sand and gravel granted or refused planning permission for extraction between 1 January 2014 and 31 December 2014 and the quantities subject to planning applications that were pending determination at 31 December 2014. Further detail on each of the planning applications is shown in Appendix 3.

4.11 Between 1 January 2014 and 31 December 2014 there were no additional reserves of sand and gravel were granted planning permission for extraction. Two planning applications were pending determination at 31 December 2014 and together these involve the potential extraction of 6.5 million tonnes of sand and gravel for aggregate uses. This figure relates to Eppleton Quarry in Sunderland (6,000,000)⁵ and Crawcrook Quarry in Gateshead (550,000 tonnes)⁶. No planning applications for sand and gravel extraction were refused planning permission in North East England during 2014.

Table 4.9: Quantities of sand and gravel subject to planning applications in the North East England during 2014 (thousand tonnes)

	Granted	Refused	Pending
County Durham	0	0	0
Northumberland	0	0	0
Tees Valley	0	0	0
Tyne and Wear	0	0	6,550
North East England	0	0	6,550

Notes:

*Reserve information collected from Mineral Planning Authorities and planning application submissions
Does not include reserves subject to applications to extend the time period for extraction*

⁵ Eppleton Quarry: Planning permission for an extension to Eppleton Quarry was granted by Sunderland City Council in 2015 following the completion of a legal agreement.

⁶ Crawcrook Quarry: It is understood that the applicant will no longer be proceeding with an application to extend Crawcrook Quarry. A decision on this has yet to be confirmed formally.

5. Production of primary aggregates: Marine sand and gravel

Overview

5.1 This chapter sets out information on sales of marine dredged sand and gravel landed at wharves in North East England.

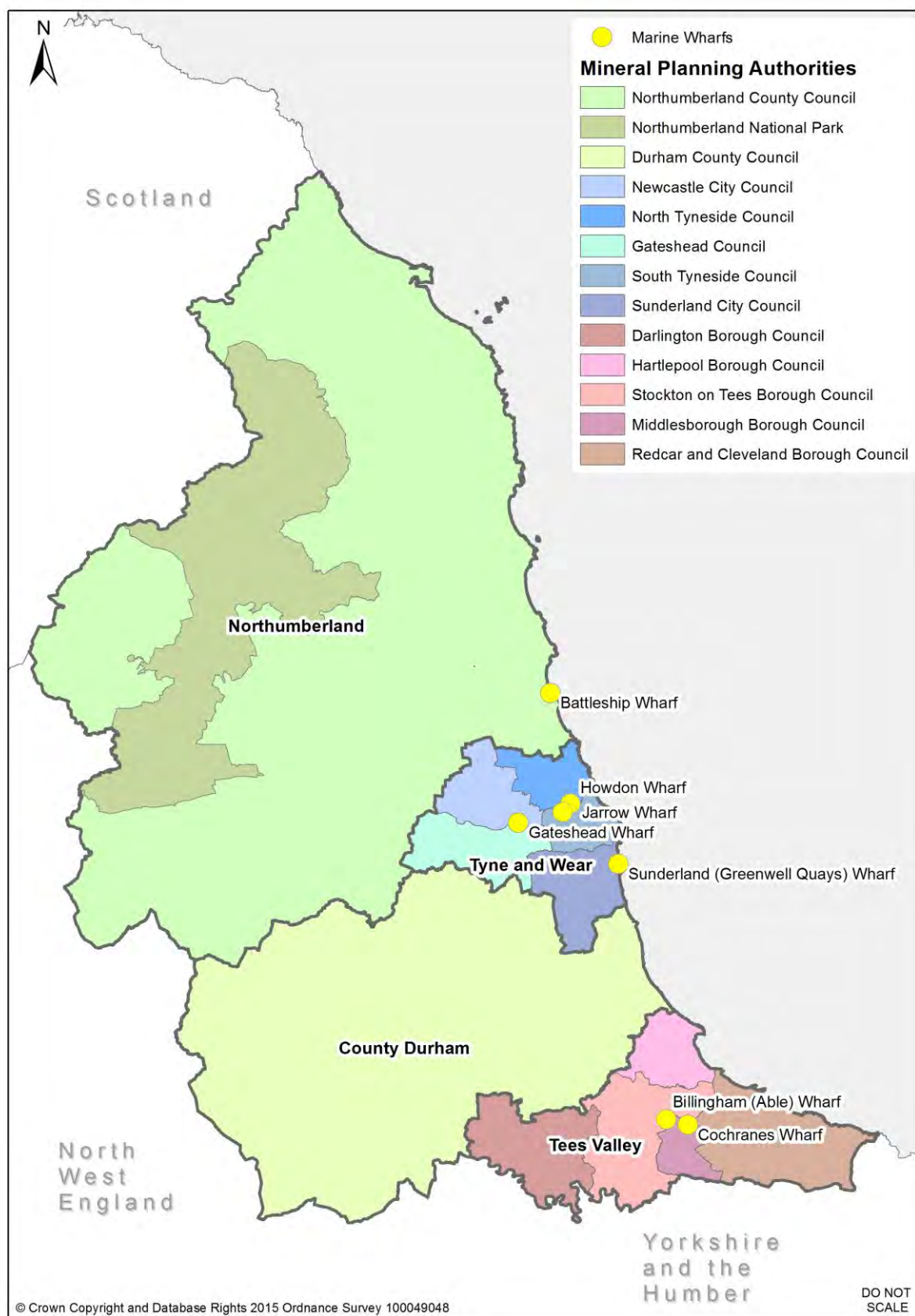
Sand and gravel wharves

5.2 In 2014 there were four wharves in North East England producing land-won sand and gravel for aggregate use (see Table 5.1 below). The wharves are located at Battleship Wharf at the Port of Blyth in Northumberland, the River Tyne, Sunderland and the River Tees. Three of the wharves in North East England are currently mothballed and were inactive during 2014. This includes Billingham Wharf on the River Tees and Gateshead Wharf on the River Tyne, which have been inactive since 2010 and 2012 respectively, and Howdon Wharf in North Tyneside, which was active during previous monitoring periods. Further details of the both active and inactive sites are provided in Appendix 1. There are no active wharves importing sand and gravel for aggregate use in County Durham.

Table 5.1: Wharves in North East England for the importation of sand and gravel aggregate sites, 2014

Sub-area	Active sites in 2014	Inactive sites in 2014
Northumberland	<ul style="list-style-type: none">Battleship Wharf	
Tees Valley	<ul style="list-style-type: none">Cochranes Wharf	<ul style="list-style-type: none">Billingham (Able) Wharf
Tyne and Wear	<ul style="list-style-type: none">Jarrow WharfSunderland (Greenwells Quay) Wharf	<ul style="list-style-type: none">Gateshead WharfHowdon Wharf

Figure 5.2: Wharf sites in North East England



Marine sand and gravel sales

5.3 Information on sales of marine-dredged sand and gravel from wharfs in North East England in 2014, along with sales in previous monitoring periods, is provided in Table 5.3.

5.4 Sales of sand and gravel from marine wharfs in North East England where marine-dredged sand and gravel was landed and processed were 536,652 tonnes in 2014. This represents an increase in sales of 19% when compared to sales in 2013 and is considered to be as a result of growth in construction activity in 2014. Notwithstanding this it is recognised that the sales levels are still significantly lower than those prior to the economic downturn. Between 2007 (1,132,000 tonnes) and 2009 (563,000 tonnes) sales decreased by around 50% mainly as a consequence of the economic downturn and a resulting decrease in demand for primary aggregates. Following the significant decrease in sales between 2007 and 2009, sales remained at a similar level in the period from 2009 to 2013 reflecting the economic conditions over that period. The economic conditions have resulted in Billingham Wharf (since 2012) on the River Tees and both Gateshead Wharf (since 2010) and Howdon Wharf (since 2014) on the River Tyne being mothballed by their operators. These sites were inactive during 2014 and this has also had an effect on sales of marine sand and gravel.

Table 5.3: Sales of marine dredged sand and gravel for aggregate use from North East England, 2005 to 2014 (thousand tonnes)

Year	County Durham	Northumberland	Tees Valley	Tyne and Wear	North East England
2005	0	0	#	#	1,049
2006	0	0	#	#	1,142
2007	0	0	#	#	1,132
2008	0	0	#	#	998
2009	0	0	#	#	563
2010	0	0	#	#	678
2011	0	0	#	#	509
2012	0	0	#	#	491
2013	0	#	#	#	451
2014	0	#	#	#	537
Ten year sales average	0	#	#	#	755

Notes: # Confidential figure included in the figure for North East England

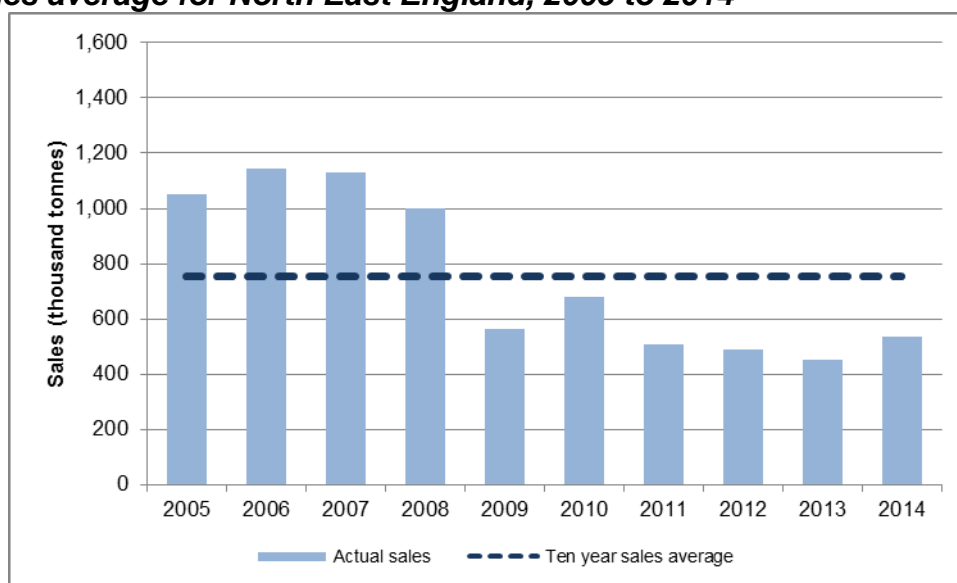
5.5 The sales of marine sand and gravel by broad end-use product categories are shown in Table 5.4. These end-use figures should be treated with some caution as, although operators know what products they sell, they cannot always be certain what the products will ultimately be used for. Concreting sand was the largest product for marine dredged sand and gravel sales in 2014, accounting for 90.1% of sales for aggregate use. The other main products were gravel for concrete aggregate (4.3%), sand for asphalt (2.4%) and other screened or graded gravel (1.8%).

Table 5.4: Sales of marine-dredged sand and gravel from North East England for aggregate use by end-use in 2014 (tonnes)

End-use	Marine sand and gravel sales (tonnes)
Sand for asphalt	0
Sand for use in mortar	15,701
Sand for concreting and sharp sand	488,097
Gravel for asphalt	0
Gravel for concrete aggregate	22,996
Other screened/graded gravel	9,820
Other sand and gravel	38
Sand and gravel with unknown end-use	0
Total marine sand and gravel	536,652

5.6 A comparison between the ten year sales average and actual sales is shown in Figure 5.5. The ten year marine sand and gravel sales average from North East England is 755,000 tonnes. Sales of marine sand and gravel over the period between 2009 and 2014 are below the ten year sales average, following a significant reduction in sales compared to pre-2009. Sales have fallen below the ten year sales average due to a reduction in demand as a result of the economic downturn and a reduction in construction activity. While sales continue to be below average sufficient capacity exists at the wharf sites to increase the quantities of marine sand and gravel landed, particularly given that three of the wharfs in North East England were identified as being inactive in 2014.

Figure 5.5: Comparison of actual sales of marine sand and gravel and the ten year sales average for North East England, 2005 to 2014



6. Recycled and secondary aggregates

6.1 National planning policy, as set out in the National Planning Policy Framework, encourages the use of alternatives to primary aggregates. The guidelines for the provision of aggregates over the period from 2005 to 2020, published in June 2009, assume a significant portion of the supply will be met from recycled and secondary aggregates (see Table 2.1).

6.2 The 2014 aggregates monitoring survey collected data on sales of recycled and secondary materials for aggregate use. This involved surveying the operators of 'fixed' construction and demolition recycling sites and secondary aggregates producers in North East England. The figures should, be treated with some degree of caution as not all producers in North East England responded to the survey and have thus not been included in the figures. In addition, the survey does not include mobile crushers and screens which are known to make a significant contribution in terms of the quantities of construction and demolition waste recycled for aggregate uses.

6.3 The survey found that North East England produces recycled aggregates from construction and demolition projects and secondary aggregates from industrial by-products. Secondary aggregates are produced from pulverised fuel ash and furnace bottom ash at the Lynemouth Power Station in Northumberland, ash from the Energy for Waste Plant at Haverton Hill on Teesside and materials originating from the steelworks at Redcar. Table 6.1 records recycled and secondary aggregate sales in North East England of 1.2 million tonnes in 2014.

6.4 Sales of recycled and secondary aggregates from North East England in 2014 are at a similar level to those in the previous monitoring periods and this reflects a lower level of sales due to the economic downturn and the prevailing economic conditions. These economic conditions, including the reduction in construction activity, have also resulted in a number of sites across North East England ceasing the production of recycled and secondary aggregates. The deficiencies with data make it difficult to analyse these trends in detail.

Table 6.1: Sales of recycled and secondary aggregates in North East England, 2014 (thousand tonnes)

	County Durham	Northumberland	Tees Valley	Tyne and Wear	North East England
Construction and demolition waste	59.7	62.0	30.0	410.1	561.9
Road planings	1.6	5.0	0.0	41.1	47.7
Spent railway track ballast	0.0	0.0	0.0	20.0	20.0
Colliery spoil	0.0	0.0	0.0	45.0	45.0
Furnace Bottom Ash (Power stations)	0.0	25.0	0.0	0.0	25.0
Pulverised Fuel Ash (Power stations)	0.0	30.0	0.0	0.0	30.0
Incinerator Bottom Ash (Energy from Waste)	0.0	0.0	132.8	0.0	132.8
Slag: Blast furnace and basic oxygen furnace	0.0	0.0	352.0	0.0	352.0
Spent foundry sand	0.0	0.0	0.0	0.0	0.0
Waste glass	0.0	0.0	0.0	0.5	0.5
Other	0.0	0.0	0.0	0.0	0.0
Total	61.4	122.0	514.8	516.7	1,214.9

7. Development Plans

Regional Spatial Strategy for North East England

7.1 Following the General Election in May 2010 the Government committed to abolishing all Regional Spatial Strategies. Through the Localism Act 2011 the Government put in place the legislation that allowed the Regional Spatial Strategies to be revoked. The Regional Spatial Strategy for North East England was revoked on 15 April 2013 and now no longer forms part of the statutory development plan for the Mineral Planning Authority areas in North East England.

Local Plans

7.2 Local Planning Authorities are required to prepare 'Local Plans' for their areas, which set out the planning policies to guide and assess development proposals. This includes policies for minerals development prepared by these authorities in their role as a Mineral Planning Authority. Progress with the preparation local development plan documents in North East England is discussed in more detail below and the key milestones for preparation of plans are shown in Appendix 4.

County Durham

7.3 Durham County Council, a unitary authority, is preparing a Local Plan for County Durham. This plan will incorporate strategic policies on minerals extraction and strategic mineral site allocations. A complimentary Minerals and Waste Policies and Allocations document is also to be prepared. This document will contain detailed development management policies for minerals and potentially non-strategic mineral site allocations.

7.4 The Local Plan (County Durham Plan) was submitted for independent examination in April 2014. The interim inspector's report received following the examination hearings identified a number of issues regarding the soundness. This was subsequently successfully challenged by the Council and the Government consented to the quashing of the report. The Local Plan was subsequently withdrawn in March 2016.

7.5 There is now a revised timetable for the preparation of the Local Plan. Consultation on Issues and Options is programmed for June and July 2016 and Preferred Options is programed for December 2016 and January 2017. Consultation on a pre-submission draft (publication stage) is then programmed for July and August 2017 and submission for independent examination will be in December 2017. The examination is scheduled to occur in 2018 with adoption in November 2018. Work to commence preparation of the Minerals and Waste Policies and Allocations Document will commence in May 2018 and adoption is scheduled for April 2020.

Northumberland

7.6 There are two Mineral Planning Authorities in the Northumberland sub-area. The Northumberland National Park Authority is the Mineral Planning Authority for the Northumberland National Park area and Northumberland County Council, a unitary authority, is the Mineral Planning Authority for the area of Northumberland outside the Northumberland National Park. These authorities have responsibility for preparing Local Plans for their respective areas, which will incorporate policies on minerals extraction.

7.7 The Northumberland National Park Authority adopted a Core Strategy and Development Policies document in March 2009. This document includes a policy on mineral extraction.

7.8 Northumberland County Council is currently preparing a Core Strategy, which will contain strategic minerals policies. Consultation on a pre-submission draft (publication stage) of the Core Strategy took place between 14 October 2015 and 25 November 2015. A further consultation on major modifications to the Core Strategy is programmed to take place in June and July 2016 prior to its submission to the Secretary of State for independent examination in December 2017. The examination is expected to take place in spring 2017.

Tees Valley

7.9 The five mineral planning authorities in the Tees Valley sub-area (Darlington Borough Council, Hartlepool Borough Council, Middlesbrough Borough Council, Redcar and Cleveland Borough Council and Stockton on Tees Borough Council) have produced Joint Minerals and Waste Development Plan Documents for the Tees Valley area. The Tees Valley Joint Minerals and Waste Core Strategy Development Plan Document and the Tees Valley Joint Minerals and Waste Policies and Sites Development Plan Document were adopted in September 2011.

Tyne and Wear

7.10 The Tyne and Wear sub-area contains five metropolitan borough councils (Gateshead, Newcastle, North Tyneside, South Tyneside and Sunderland), which are the Mineral Planning Authorities for their respective areas. A summary of progress with Local Plans for each of these authorities is provided below:

- Gateshead Council and Newcastle City Council adopted a Joint Core Strategy and Urban Core Plan document in March 2015.
- North Tyneside Council is producing a Local Plan. Consultation on a pre-submission draft (publication stage) took place between 2 November 2015 and 14 December 2015. Submission to the Secretary of State is programmed to take place in late spring 2016 with the examination taking place in late summer 2016. It is anticipated that adoption will take place in 2017.

- South Tyneside Council adopted a Core Strategy in June 2007, a document containing criteria-based policies for development management in December 2011 and a Site Allocations document in April 2012. Work is now underway to review these documents as part of a new-style Local Plan. Consultation on key issues and options took place between February and April 2013 and further consultation on potential growth scenarios took place in summer 2015. The next stage of consultation on the draft Strategic Land Review, will take place between May and June 2016. Adoption of the Local Plan is expected to be in 2018.
- Sunderland City Council is preparing a Core Strategy document and a separate site allocations document as part of their Local Plan. A revised Core Strategy Preferred Options report was published for consultation in August 2013 and work is progressing towards the publication stage. At the time of writing the timetable is being reviewed and it is expected that details will be available in later in 2016.

8. Local Aggregate Assessments

8.1 The publication of the National Planning Policy Framework in 2012 introduced a requirement for all Mineral Planning Authorities to prepare an annual Local Aggregate Assessment. This section of the monitoring report reports on the status of the LAAs for each of the Mineral Planning Authorities in North East England and the provision for aggregates made within them.

Purpose of a Local Aggregate Assessment

8.2 National Planning Practice Guidance advises that a Local Aggregate Assessment should contain three elements:

- A forecast of the demand for aggregates based on the rolling average of ten years sales data and other relevant local information;
- an analysis of all aggregate supply options, including land-won resources, recycled aggregates, secondary aggregates, marine aggregates and imports/exports; and
- an assessment of the balance between demand and supply, and the economic and environmental opportunities and constraints that might influence the situation.

The LAA should then conclude if there is a shortage or a surplus of supply to meet demand and, if the former, how this is being addressed.

Progress with Local Aggregate Assessments in North East England

8.3 A summary of progress with the preparation of Local Aggregate Assessments in North East England is provided in Table 8.1. The Mineral Planning Authorities in County Durham, Northumberland and Tyne and Wear have worked together to produce a Joint Local Aggregate Assessment and the five Tees Valley authorities have also worked together to produce a Joint Local Aggregate Assessment. Updates of these documents using 2014 sales and reserves data were submitted for scrutiny by the North East AWP in March 2016.

Provision for aggregates in the LAAs for North East England

8.4 The provision for aggregates that is detailed in the Local Aggregate Assessments is summarised in Table 8.1 below. For the Mineral Planning Authorities in County Durham, Northumberland and Tyne and Wear, the suggested provision has been based on the ten year sales average (over the period from 2004 to 2013) with an uplift to take account of a proposed increase in house building identified in emerging and adopted Local Plans. In Tees Valley the level of provision is as set out in the Tees Valley Joint Minerals and Waste Core Strategy (adopted September 2011).

Table 8.1: Local Aggregate Assessment progress and provision for aggregates supply in North East England

Sub-area	Mineral Planning Authority	LAA date	LAA figure		Calculation method
			Crushed rock	Sand and gravel	
County Durham	Durham County Council	March 2016 (draft)	3,197,000 tonnes	299,000 tonnes	10 year sales average (2004 to 2013) with uplift for proposed housing growth
Northumberland	Northumberland County Council	March 2016 (draft)	1,687,000 tonnes	550,000 tonnes	10 year sales average (2004 to 2013) with uplift for proposed housing growth
	Northumberland National Park Authority	March 2016 (draft)			
Tees Valley	Darlington Borough Council	March 2016 (draft)	187,500 tonnes	175,000 tonnes	Based on recommended sub-regional apportionment of the national and regional guidelines for aggregates provision (2005 to 2020)
	Hartlepool Borough Council	March 2016 (draft)			
	Middlesbrough Borough Council	March 2016 (draft)			
	Redcar and Cleveland Borough Council	March 2016 (draft)			
	Stockton on Tees Borough Council	March 2016 (draft)			
Tyne and Wear	Gateshead Metropolitan Borough Council	March 2016 (draft)	329,000 tonnes	334,000 tonnes	10 year sales average (2004 to 2013) with uplift for proposed housing growth
	Newcastle City Metropolitan Borough Council	March 2016 (draft)			
	North Tyneside Metropolitan Borough Council	March 2016 (draft)			
	South Tyneside Metropolitan Borough Council	March 2016 (draft)			
	Sunderland City Metropolitan Borough Council	March 2016 (draft)			
North East England	-	-	5,400,500 tonnes	1,359,000 tonnes	Total annual provision in LAAs in North East England

Contribution to meeting local and national needs

8.5 For North East England, the combined figures in Local Aggregate Assessments make provision for 5.4 million tonnes of crushed rock per annum and 1.36 million tonnes of sand and gravel per annum. Such provision for crushed rock would exceed the ten year sales average by 22%. For sand and gravel, such provision would exceed the ten year sales average by 37%. Based upon the provision set out in the Local Aggregate Assessments, the landbank of permitted reserves at 31 December 2014 for sand and gravel is 14.0 years and 40.6 years for crushed rock. In respect to marine sourced aggregates, the wharfs within North East England are capable of maintaining and increasing supply.

8.6 On this basis the North East Aggregates Working Party consider that North East England is making a full contribution to both national and local aggregate needs and there is no undue reliance on imports of aggregates.

9. Major developments that have a greater than local influence on aggregates demand

9.1 The purpose of this section of the report is to identify major construction projects and significant developments that will have a significant influence on the demand for primary aggregates and recycled and secondary aggregates from sites in North East England. Table 9.1 provides a summary of current and planned projects that are considered to be of significance.

Table 9.1: Major construction projects and significant developments of note that could influence demand for aggregates

Project	Location	Details	Timeframe
A1 upgrade at Lobley Hill	Gateshead	Upgrade of two junctions to include new parallel road links between the junctions and three lanes in each direction.	Construction commenced in summer 2014 and completion is expected to be summer 2016.
Morpeth Northern Bypass	Morpeth, Northumberland	3.8 km of new single carriageway road.	Construction commenced in spring 2015 and will be completes in late 2016.
A1 Leeming to Barton	North Yorkshire	12 mile section of dual carriageway to be replaced with a new three lane motorway.	Construction commenced in 2014 and will be completed mid-2017.
A1 dualling in Northumberland	Northumberland	Upgrade 13 miles of existing single carriageway to dual carriageway between Morpeth and Felton and Alnwick and North Charlton.	Construction could start in 2020 (subject to funding and completion of the relevant statutory procedures).
A19 Silverlink junction improvements	North Tyneside	Upgrading of A19/A1058 junction to provide a three level interchange.	Construction to start in 2016.
A19 Testos junction improvements	South Tyneside	It is planned to raise the A19 above the A184 on a flyover.	Construction could start in 2018 and be complete by late 2020.
International Advanced Manufacturing Park (IAMP)	South Tyneside and Sunderland	Development of manufacturing site on 100 hectares of land to the north of the Nissan car manufacturing plant.	Currently under consideration. No dates available.

9.2 The projects or developments that were taking place during 2014 have contributed to the overall increase in sales when compared to sales in 2013. The scale of the projects identified in Table 9.1 are considered to be of a similar scale to projects that have taken place during the previous ten year period and in turn are considered to have a similar demand to that experienced over that period. Nonetheless it is considered that these projects or developments will contribute to sales over and above those experienced during the recent economic downturn.

Projects such as the A1 dualling in Northumberland is likely to result in increased supply from quarries in North Northumberland during construction.

9.3 Outside of North East England, a 12 mile section of dual carriageway on the A1 road between Leeming and Barton in North Yorkshire is being replaced with a new three lane motorway. Construction work commenced in 2014 and will be completed by mid-2017. This major road scheme could have an influence on supply from quarries and wharfs in North East England, particularly the sites in southern County Durham that are geographically close to the project in North Yorkshire.

Appendix 1: Primary aggregates producing sites included in the Monitoring Report

This appendix details the sites that have been included in the aggregates sales and/or reserve figures in this report. The sites included are those that were active during 2014 (i.e. were in production during 2014) or were inactive during 2014 (i.e. not in production during 2014 but have a valid planning permission for extraction). Dormant sites or sites that do not have a valid planning permission are not included and have not been included in the figures in this report. The planning status of the quarries can be summarised as follows:

- Active: In production, including from stockpiles, at some point during 2014; and
- Inactive: Not in production during 2014 but has either been worked in the past or has yet to be worked and has a valid planning permission for extraction.

This appendix also details selected designations that either wholly or partially overlap with the quarry or wharf sites. The designations included are National Parks, Areas of Outstanding Natural Beauty (AONBs), Sites of Special Scientific Interest (SSSI), Special Protection Areas (SPAs), Special Areas of Conservation (SACs) and Green Belt.

The site operator details are correct as at 31 December 2014.

QUARRIES

County Durham quarries

Site	Location and Grid Reference	Operator in 2014	Mineral	Planning status in 2014	Designations
Aycliffe East Quarry	Aycliffe NZ 290 222	Stonegrave Aggregates	Magnesian limestone	Closed (production ceased in 2013)	
Bishop Middleham Quarry	Ferryhill NZ 328 326	W & M Thompson	Magnesian limestone	Active	SSSI
Broadwood Quarry	Frosterley NZ 035 365	Sherburn Stone	Carboniferous limestone	Inactive	
Cornforth Quarry	West Cornforth NZ 325 344	Lafarge Tarmac	Magnesian limestone	Inactive	
Coxhoe (Raisby) Quarry	Coxhoe NZ 347 352	Hope Construction Materials	Magnesian limestone	Active	SSSI
Crime Rigg Quarry	Sherburn Hill NZ 346 416	Sherburn Stone	Magnesian limestone and Permian sand	Active	SSSI
Heights Quarry	Westgate NY 925 388	Aggregate Industries UK	Carboniferous limestone	Active	AONB
Hulands Quarry	Bowes NZ 016 140	Aggregate Industries UK	Carboniferous limestone	Active	
Hummerbeck Quarry	West Auckland NZ 194 259	Hall Construction	Sand and gravel	Inactive (yet to begin)	

Site	Location and Grid Reference	Operator in 2014	Mineral	Planning status in 2014	Designations
Kilmond Wood Quarry	Bowes NZ 024 134	Kearton Farms	Carboniferous limestone	Active	
Low Harperley Quarry	Wolsingham NZ 112 356	Sherburn Stone	Sand and gravel	Inactive (yet to begin)	
Middleton (Force Garth) Quarry	Middleton in Teesdale NY 872 282	CEMEX	Igneous rock	Active	AONB, SAC, SPA, SSSI
Old Quarrington Quarry	Bowburn NZ 330 380	Lafarge Tarmac	Magnesian limestone and Permian Sand	Active	SSSI
Running Waters Quarry	Bowburn NZ 334 403	Sherburn Stone	Magnesian limestone	Inactive	
Thrislington Quarry	Ferryhill NZ 317 322	Lafarge Tarmac	Magnesian limestone and Permian sand	Active	SAC, SSSI
Witch Hill Quarry	Bowburn NZ 345 397	Sherburn Stone	Magnesian limestone	Inactive	

Northumberland quarries

Site	Location and Grid Reference	Operator in 2014	Mineral	Planning status in 2014	Designations
Barrasford Quarry	Barrasford NY 913 743	Lafarge Tarmac	Igneous rock and Carboniferous limestone	Active	
Belford (Easington) Quarry	Belford NU 130 343	Lafarge Tarmac	Igneous rock	Inactive	
Cocklaw Quarry	Wall NY 931 701	Tynedale Roadstone	Carboniferous limestone	Inactive (yet to begin)	
Cragmill Quarry	Belford NU 108 346	CEMEX	Igneous rock	Active	
Divethill Quarry	Great Bavington NY 978 795	CEMEX	Igneous rock	Active	
Ebchester (Broadoak) Quarry	Ebchester NZ 098 547	Lafarge Tarmac	Sand and gravel	Active	Green Belt
Ebchester (Hollings Hill) Quarry	Ebchester NZ 098 574	Lafarge Tarmac	Sand and gravel	Closed (production ceased in 2013)	Green Belt
Haughton Strother Quarry	Humshaugh NY 897 740	W & M Thompson	Sand and gravel	Active	
Harden Quarry	Biddlestone NY 959 086	Lafarge Tarmac	Igneous rock	Active	National Park

Site	Location and Grid Reference	Operator in 2014	Mineral	Planning status in 2014	Designations
Hedgeley Quarry	Powburn NZ 068 180	North East Concrete	Sand and gravel	Active	SSSI, SAC
Hemscott Hill Beach	Widdrington NZ 931 703	Mr W Bell	Sand and gravel	Active	SSSI
Howick Quarry	Longhoughton NU 238 169	Lafarge Tarmac	Igneous rock	Active	
Keepersfield Quarry	Humshaugh NY 895 727	Hanson	Igneous rock and Carboniferous limestone	Active	SSSI
Lanton (Cheviot) Quarry	Milfield NT 954 311	Lafarge Tarmac	Sand and gravel	Active	
Longhoughton Quarry	Longhoughton NU 232 153	Purvis	Igneous rock	Active	SSSI
Merryshields Quarry	Stocksfield NZ 063 617	SITA UK	Sand and gravel	Inactive	Green Belt
Mootlaw Quarry	Matfen NZ 018 755	North Tyne Roadstone	Carboniferous limestone	Inactive	
Swinburne Quarry	Colwell NZ 021 791	Hanson	Igneous rock	Inactive	
Wooperton Quarry	Wooperton NU 048 204	CEMEX	Sand and gravel	Inactive	

Tees Valley quarries

Site	Location and Grid Reference	Operator in 2014	Mineral	Planning status in 2014	Designations
Hart Quarry	Hartlepool NZ 475 345	Hart Aggregates	Magnesian limestone	Active	
Hartlepool Beach	Hartlepool NZ 540 270	CEMEX	Sand	Inactive	
Stockton (Thorpe Thewles) Quarry	Stockton NZ 415 245	CEMEX	Sand and gravel	Inactive	

Tyne and Wear quarries

Site	Location and Grid Reference	Operator in 2014	Mineral	Planning status in 2014	Designations
Marsden Quarry	Whitburn NZ 406 642	Owen Pugh	Magnesian limestone	Active	Green Belt
Eppleton Quarry	Hetton-le-Hole NZ 360 482	Eppleton Quarry Products	Magnesian limestone and sand	Active	

MARINE WHARVES

Northumberland marine wharves

Site	Location and Grid Reference	Operator in 2014	Mineral	Status in 2014	Designations
Battleship Wharf	Cambois NZ 309 827	Sherburn Stone	Sand and gravel	Active	
Battleship Wharf	Cambois NZ 309 827	Aggregate Industries	Igneous rock	Active	

Tees Valley marine wharves

Site	Location and Grid Reference	Operator in 2014	Mineral	Status in 2014	Designations
Cochranes Wharf	Middlesbrough NZ 509 202	Lafarge Tarmac	Sand and gravel	Active	
Billingham (Able) Wharf	Billingham NZ 479 214	CEMEX	Sand and gravel	Inactive	

Tyne and Wear marine wharves

Site	Location and Grid Reference	Operator in 2014	Mineral	Status in 2014	Designations
Howdon Wharf	North Shields NZ 335 661	Lafarge Tarmac	Sand and gravel	Inactive	

Site	Location and Grid Reference	Operator in 2014	Mineral	Status in 2014	Designations
Gateshead Wharf	Gateshead NZ 265 638	Lafarge Tarmac	Sand and gravel	Inactive	
Sunderland (Greenwells Quay) Wharf	Sunderland NZ 409 579	Northumbrian Roads	Sand and gravel and igneous rock	Active	
Jarrow Wharf	South Shields NZ 335 657	CEMEX	Sand and gravel	Active	

Appendix 2: List of fixed sites producing recycled and secondary aggregates

The fixed recycled and secondary aggregates sites included in the recycled and secondary aggregates figures from the 2014 aggregates monitoring survey are detailed below.

Sub-area	Site	Location and Grid Reference	Operator in 2014	Status in 2014	Materials
County Durham:	Aycliffe Quarry	Aycliffe NZ 290 222	Stonegrave Aggregates	Active	Construction, demolition and excavation waste
	Constantine Farm	Crook NZ 172 336	W Marley	Active	Construction, demolition and excavation waste
	Joint Stocks Quarry	Coxhoe NZ 328 363	Premier Waste	Inactive	Construction, demolition and excavation waste
	Old Brickworks	Tanfield NZ 194 548	Ken Thomas	Active	Construction, demolition and excavation waste
	Old Quarrington Quarry	Bowburn NZ 330 380	Lafarge Tarmac	Active	Construction, demolition and excavation waste
	Thrislington Quarry	West Cornforth NZ 317 322	Lafarge Tarmac	Active	Construction, demolition and excavation waste
Northumberland:	Barrington Industrial Estate	Bedlington NZ 264 836	JBT Waste Services	Active	Construction, demolition and excavation waste
	Linton Transfer Station	Linton NZ 262 914	R Thornton	Active	Construction, demolition and excavation waste
	Longhoughton (Ratcleugh) Quarry	Longhoughton NU 232 153	Purvis	Inactive	Construction, demolition and excavation waste

Sub-area	Site	Location and Grid Reference	Operator in 2014	Status in 2014	Materials
	Lynemouth Power Station	Lynemouth NZ 305 901	RioTinto Alcan	Active	Power station waste – furnace bottom ash and pulverised fuel ash
	Prestwick Pit	Ponteland NZ 182 712	Holystone	Closed	Construction, demolition and excavation waste
	Thornbrough Quarry	Corbridge NZ 008 635	W & M Thompson	Active	Construction, demolition and excavation waste
	9 West Sleekburn Industrial Estate	Bedlington NZ 277 847	HFF Civil Engineering	Active	Construction, demolition and excavation waste
Tees Valley:	Cochranes Wharf	Middlesbrough NZ 515 527	Lafarge Tarmac	Active	Construction, demolition and excavation waste
	Dockside Road	Middlesbrough NZ 527 212	Eppleton Quarry Products	Closed	Blast furnace slag
	Haverton Hill EfW Facility	Stockton on Tees NZ 480 225	SITA UK	Active	Incinerator bottom ash
	Teesport	Redcar NZ 538 228	Lafarge Tarmac	Active	Blast furnace slag
Tyne and Wear:	Eppleton Quarry	Hetton le Hole NZ 360 482	Eppleton Quarry Products	Active	Colliery spoil
	Deptford Transfer Station	Sunderland NZ 387 580	Alex Smiles	Active	Construction, demolition and excavation waste
	Hayhole Road	North Shields NZ 343 665	Owen Pugh	Active	Construction, demolition and excavation waste

Sub-area	Site	Location and Grid Reference	Operator in 2014	Status in 2014	Materials
	Hudson Dock	Sunderland NZ 414 572	Northumbrian Roads	Active	Construction, demolition and excavation waste; Road planings
	Marsden Quarry	Whitburn NZ 406 642	Owen Pugh	Active	Construction, demolition and excavation waste
	Newburn	Newcastle NZ 185 643	MGL Group	Active	Construction, demolition and excavation waste
	Springwell Quarry	Washington NZ 283 586	W & M Thompson	Active	Construction, demolition and excavation waste
	Stephenson Street	Willington Quay NZ 324 661	G O'Brien	Active	Construction, demolition and excavation waste

Appendix 3: Planning applications for primary aggregates extraction

The planning applications granted, refused or withdrawn in North East England during 2014 and the planning applications awaiting a decision at 31 December 2014 are detailed below.

Site name and location	Mineral Planning Authority	Operator / Applicant	Mineral	Tonnage (for aggregate use)	Type of Application	Submitted	Decision
<u>County Durham:</u>							
Hawthorn Seaham (NZ 435 464)	Durham County Council	Lafarge Tarmac	Magnesian limestone	4,000,000	Determination of modern conditions for a dormant site	10 May 2000	Pending at 31 December 2014
Harrow and Ashy Bank Eastgate (NY 956 395)	Durham County Council	Lafarge Tarmac	Carboniferous limestone	3,750,000	Determination of modern conditions for a dormant site	24 May 2007	Pending at 31 December 2014
Bishop Middleham Ferryhill (NZ 328 326)	Durham County Council	W&M Thompson	Magnesian limestone	2,300,000	Extension to existing site	26 February 2013	Pending at 31 December 2014
Harniston Crags Frosterley (NY 987 349)	Durham County Council	Arago	Carboniferous limestone	7,424	Borrow pit	9 October 2013	Granted 18 March 2014
Cotherstone Moor Baldersdale (NY 905 162)	Durham County Council	Cotherstone Moor Estate	Sandstone	7,500	Borrow pit	13 January 2014	Granted 16 April 2014
Nookton Fell Blanchland (NY 916 475)	Durham County Council	J Scott-Harden	Sandstone	10,000	Borrow pit	20 March 2014	Granted 19 June 2014

Site name and location	Mineral Planning Authority	Operator / Applicant	Mineral	Tonnage (for aggregate use)	Type of Application	Submitted	Decision
<u>Northumberland:</u>							
Harden Biddlestone (NY 959 086)	Northumberland National Park Authority	Lafarge Tarmac	Igneous rock	1,100,000	Extension to existing site		Granted 11 December 2014
<u>Tees Valley:</u>							
No relevant planning applications were either granted or refused in 2014 or were pending a decision at 31 December 2014.							
<u>Tyne and Wear:</u>							
Crawcrook Gateshead (NZ 138 637)	Gateshead Council	SITA UK and CEMEX	Sand and gravel	550,000	Extension to existing site	26 September 1997	Pending at 31 December 2014
Eppleton Sunderland (NZ 359 482)	Sunderland City Council	Eppleton Quarry Products	Magnesian limestone and Permian sand	Magnesian limestone - 6,000,000; Permian sand – 6,000,000	Extension to existing site	19 December 2007	Pending at 31 December 2014

Other planning applications of note:

- County Durham – There were three periodic reviews pending determination by Durham County Council at 31 December 2014. These periodic reviews are for Middleton (Force Garth) Quarry (submitted November 2011), Running Waters (submitted 18 September 2012) and Kilmond Wood Quarry (submitted 23 October 2013).
- Northumberland – There were three periodic reviews pending determination by Northumberland County Council at 31 December 2014. These periodic reviews are for Barrasford Quarry (submitted October 2014), Hemscott Hill (submitted November 2012) and Mootlaw Quarry (submitted November 2014).

Appendix 4: Key milestones and progress with local minerals plan documents

The key milestones for the preparation of local minerals plan documents in North East England, as at 31 March 2016 are detailed below. This is based on the latest information supplied by the Mineral Planning Authorities and in a number of cases the milestones are subject to final agreement.

Mineral Planning Authority	Development Plan Document (DPD)	Early Engagement	Publication	Submission	Examination	Adoption	Comments
Durham County	County Durham Plan	Issues and options – June and July 2016; Preferred options – November and December 2016	July/August 2017	December 2017	February/March 2018 and July 2018	November 2018	These are revised milestones following the withdrawal of the County Durham Plan from examination in March 2016.
	Minerals and Waste Policies and Allocations	October 2018	March 2019	August 2019	December 2019	April 2020	
Northumberland County	Northumberland Local Plan Core Strategy	Issues and Options – May 2012; Preferred Options 1 – February 2013; Preferred Options 2 – October 2013; Full Draft Plan – 12 December 2014 to 11 February 2015.	14 October 2015 to 25 November 2015 (Further consultation on major modifications programmed for June and July 2016)	December 2016	Spring 2017	Summer 2017	

Mineral Planning Authority	Development Plan Document (DPD)	Early Engagement	Publication	Submission	Examination	Adoption	Comments
Northumberland National Park	Core Strategy and Development Policies	Complete	Complete	Complete	Complete	Complete (March 2009)	The Core Strategy and Development Policies document was adopted in March 2009.
Tees Valley authorities (Darlington, Hartlepool, Middlesbrough, Redcar and Cleveland and Stockton-on-Tees)	Joint Minerals and Waste Core Strategy	Complete (Issues and Options – May 2007; Preferred Options – February 2008)	Complete (August 2009 and August 2010)	Complete (November 2010)	Complete (February 2011)	Complete (September 2011)	Joint Minerals and Waste DPDs have been prepared by the five Mineral Planning Authorities in Tees Valley. These DPDs were adopted in September 2011.
	Joint Minerals and Waste Site Allocations	Complete (Issues and Options – May 2007; Preferred Options – February 2008)	Complete (August 2009 and August 2010)	Complete (November 2010)	Complete (February 2011)	Complete (September 2011)	
Gateshead and Newcastle	Joint Core Strategy and Urban Core Plan	Early engagement – January 2011, September 2011 and June 2012.	September 2013	February 2014	June to July 2014 and reconvened in October 2014	26 March 2015	Gateshead and Newcastle councils have prepared a joint Core Strategy and Urban Core Plan. Strategic policies for minerals are included in this document.

Mineral Planning Authority	Development Plan Document (DPD)	Early Engagement	Publication	Submission	Examination	Adoption	Comments
North Tyneside	Local Plan	Issues and Options – December 2006; Preferred Options – July 2010; Consultation draft – November 2013.	2 November to 14 December 2015	Late spring 2016	Late summer 2016	2017	
South Tyneside	Local Plan – including strategic and local spatial policies and site allocations	Issues and Options – February 2013; Growth options and strategic land review – May and June 2016.	Winter/Spring 2017	Summer 2017	Late 2017	2018	The Core Strategy was adopted in June 2007, the Development Management Policies DPD was adopted in December 2011 and the Site Specific Allocations DPD was adopted in March 2012. Work is now underway to review these documents as part of a new-style Local Plan.
Sunderland	Core Strategy and Development Management Policies	Issues and Options – 2005; Core Strategy Preferred Options – 2007; Alternative options – September 2009; Revised Preferred Options – August 2013.	To be confirmed	To be confirmed	To be confirmed	To be confirmed.	Timetable for publication currently under review. Dates not available at the time of writing.

Source: Mineral Planning Authorities

Appendix 5: North East Aggregates Working Party – List of Members

Chair:

Frances Wilkinson

Technical secretary:

Kevin Tipple

Central Government representative:

Department for Communities and Local Government – Eamon Mythen

Mineral Planning Authority representatives:

Darlington Borough Council – David Nelson

Durham County Council – Jason Mckewon

Gateshead Council – Chris Carr

Hartlepool Borough Council – Helen Williams

Middlesbrough Borough Council – Charlton Gibben

Newcastle City Council – Dianne Perry

North Tyneside Council – Laura Hewitt

Northumberland County Council – Kevin Tipple

Northumberland National Park Authority – Clive Coyne

Redcar and Cleveland Borough Council – Rebecca Wren

South Tyneside Council – Vikki Drummond

Sunderland City Council – Gary Clasper

Stockton on Tees Council – Jane Palmer

Marine planning representative:

Marine Management Organisation – Nathanael Percival

Aggregates industry representatives:

Aggregates Industries UK Limited – Geoff Storey

British Aggregates Association (and Sherburn Stone Co. Ltd.) – Michael Hodges

CEMEX UK Marine Limited – Graham Singleton

CEMEX UK Operations Limited – Mark Kelly

Hanson Aggregates Limited – Tom Brown

Hope Construction Materials Limited – Mike Young

Tarmac Limited – Matthew Pixton

Mineral Products Association (MPA) – Mark Russell

Membership as at 31 March 2016. Full contact details are available on request from the technical secretary.