

# **North East England Aggregates Working Party**

Annual Report 2021

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# Acronyms

<b>AWP</b>	Aggregate Working Party
<b>BAA</b>	British Aggregates Association
<b>BGS</b>	British Geological Survey
<b>BMAPA</b>	British Marine Aggregate Producers Association
<b>CDEW</b>	Construction, Demolition and Excavation Waste
<b>DLUHC</b>	Department for Levelling Up, Housing and Communities
<b>LAA</b>	Local Aggregate Assessment
<b>MPA</b>	Mineral Products Association
<b>NPPF</b>	National Planning Policy Framework

# Glossary

<b>Active site</b>	A quarry or wharf that is in production, including from stockpiles, for some time during the survey year.
<b>Aggregates</b>	Aggregates are defined as being hard, granular materials which are suitable for use either on their own or with the addition of cement, lime or a bituminous binder in construction. The most important applications for aggregates include concrete, mortar, roadstone, asphalt, railway ballast, drainage courses and bulk fill.
<b>Core Strategy</b>	Development Plan Document setting out the spatial vision and strategic objectives of the planning framework for an area.
<b>Development Plan</b>	The complete set of policies and proposals for the development and use of land and buildings in an area. This includes adopted Local Plans and neighbourhood plans, and is defined in section 38 of the Planning and Compulsory Purchase Act 2004.
<b>Dormant site</b>	As defined under the Environment Act 1995, sites where planning permission was granted between 21 July 1943 and 22 February 1982, but where no minerals development was carried out to any substantial extent at the site in the period between 22 February 1982 and 6 June 1995. Extraction cannot recommence at a dormant site until appropriate modern planning conditions have been submitted to and agreed by the Mineral Planning Authority.
<b>Duty to Cooperate</b>	Collaborative working with adjoining authorities, and other public bodies, regarding strategic issues which may have significant cross boundary impacts, during the preparation of Local Plans.
<b>Inactive site</b>	A quarry or wharf that is not in production, including from stockpiles, during the survey year. It includes both sites worked in the past and still containing permitted reserves and sites where planning permission has been received, but have yet to be worked.
<b>Landbanks</b>	The stock of mineral reserves with valid planning permissions for their extraction but where their extraction has yet to take place. The length of the aggregate landbank is the sum in tonnes of all permitted reserves for which valid planning permissions are extant, divided by the annual rate of future demand based on the latest annual Local Aggregate Assessment. The landbank is usually calculated at a mineral planning authority level.

<b>Local Aggregate Assessment</b>	An annual assessment of the demand for and supply of aggregates in a mineral planning authority's area.
<b>Local Plan</b>	A plan for the future development of a local area, drawn up by the local planning authority in consultation with the community. In law this is described as the development plan documents adopted under the Planning and Compulsory Purchase Act 2004. A local plan can consist of either strategic or non-strategic policies, or a combination of the two.
<b>LAA Aggregates Provision Rate</b>	The annual rates of provision for aggregates as detailed in the Local Aggregate Assessment which planning authorities should use as an indicator of how much should be planned for in their area.
<b>Minerals Plan / Minerals Local Plan</b>	A specialist type of Local Plan for those planning authorities with responsibilities for minerals planning, which set of a framework for decisions involving minerals development.
<b>National and Sub-National Guidelines</b>	An indication of the total amount of aggregate provision that the mineral planning authorities, collectively within each Aggregate Working Party, should aim to provide.
<b>Permitted reserves</b>	In land use planning terms, reserves are those minerals that have planning permission for extraction. It includes reserves at active and inactive quarries but does not include reserves at dormant sites or sites that have not been granted planning permission. Permitted reserves are included in the landbank calculations.
<b>Primary aggregates</b>	Naturally occurring mineral deposits, extracted specifically for use as aggregates and are used for the first time. Most primary aggregates are produced from hard, strong rock formations by crushing to produce crushed rock aggregate or from naturally occurring particulate deposits such as sand and gravel.
<b>Recycled aggregates</b>	Produced from various sources including the demolition or construction of buildings and structures or from asphalt planings as a result of work to resurface roads and from railway track ballast. Recycling involves the processing of the waste material so that it can be made into new materials for aggregate use.
<b>Secondary aggregates</b>	Aggregates obtained as a by-product of other mining or quarrying operations or aggregates obtained as a by-product of other industrial processes.

# Executive Summary

## **North East England Aggregates Working Party**

The North East England 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 the Department for Levelling Up, Housing and Communities but the members of the Aggregates Working Party provide their time on a voluntary basis.

There are thirteen mineral planning authorities in the North East England Aggregates Working Party cluster (see Figure 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).

## **Annual Monitoring Report 2021**

This report presents updated information for North East England on:

- Sales of primary aggregates in 2021;
- Permitted reserves of primary aggregates as at 31 December 2021;
- Quantity of aggregate minerals granted and refused planning permission in 2021 or subject to planning applications pending determination as at 31 December 2021;
- Production and use of recycled and secondary aggregates in 2021;
- Quarries and wharves in North East England and their operational status in 2021;
- Local Aggregates Assessments;

- Status and an update of progress with the preparation of development plans applicable to minerals; and
- Major construction projects or developments that may be significant in terms of demand for aggregate minerals from the region.

Detailed information from the previous surveys covering North East England can be found in the earlier annual reports produced by the North East England Aggregates Working Party. The survey for 2019 was part of a more comprehensive national survey (Aggregate Minerals Survey 2019 – AM2019) that is usually undertaken every four or five years by 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, consumption, and permitted reserves of primary aggregates. A report collating the results of the national survey is available to view on the gov.uk website.

### **Sales of Primary Aggregates**

- During 2021 sales of primary aggregates from North East England increased from 6.5 million tonnes in 2020 to 7.8 million tonnes in 2021. Sales in 2021 were above both the three year sales and ten year sales averages.
- This increase in sales for 2021 compared to 2020 is considered to be principally a result of the restrictions to control the Coronavirus pandemic, which saw the temporary closure of many construction sites during 2020. Prior to 2020 there had been a general increase in sales, particularly from 2013 onwards.
- Sales of land-won sand and gravel for aggregates uses increased from 0.95 million tonnes in 2020 to 1.1 million tonnes in 2021. In Northumberland the three year sales average is below the ten year sales average reflecting a decrease in sales from 2017. It is considered that this reflects a reduction in the number of operational sites in Northumberland over this period and sites beginning to work out their permitted reserves, which has had a consequential impact on productive capacity. In County Durham, there has been a notable increase in sales since 2016 and 2017 with this increase being principally due to production at Low Harperley Quarry commencing from 2017 onwards and increased production of sand at Quarrington Quarry.
- Sales of crushed rock for aggregates uses increased from 5.01 million tonnes in 2020 to 5.95 million tonnes in 2021.
- Sales of marine dredged sand and gravel increased from 0.58 million tonnes in 2020 to 0.79 million tonnes 2021.
- In addition, just less than 258,000 tonnes of crushed rock was imported by sea via wharves in North East England in 2021. This material was sourced from Norway and Scotland.



## **Reserves of Primary Aggregates**

- Reserves of sand and gravel for aggregate uses decreased from 15.3 million tonnes in 2020 to 13.9 million tonnes in 2021. This decrease in permitted reserves was as a result of sales in 2021 and no new planning permissions being granted in 2021.
- Reserves of crushed rock for aggregate uses decreased from 195.3 million tonnes in 2020 to 176.4 million tonnes in 2021. This decrease was as a result of sales in 2021, no new planning permissions being granted in 2021 and a decrease in the reported reserves at a quarry in County Durham.
- The permitted reserves recorded in 2021 for both crushed rock and sand and gravel were the lowest in the last ten monitoring periods and reflect a pattern of decreasing reserves in North East England since 2015. This is considered to be due to a combination of sales being at a higher level than new reserves granted planning permission over this period and some downward reassessment of permitted reserves at some sites due to geological and operational reasons.

## **Secondary and Recycled Aggregates**

- In 2021 it is estimated that fixed construction and demolition recycling facilities and secondary aggregates producers contributed 776,700 tonnes of recycled aggregate and 150,000 tonnes of secondary aggregate to supply from North East England.
- Sources of recycled and secondary aggregates included construction, demolition and excavation wastes, road planings, and ash from the Haverton Hill Energy from Waste Plant on Teesside.
- This recycled and secondary aggregates sales figure should be treated with some degree of caution as not all producers in North East England responded to the survey and the figures include a large number estimates of production from some sites derived from the Environment Agency Waste Data Interrogator. 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. Further work is required to understand more clearly the proportion of supply this contributes but it is thought that this could be an additional 20% to that produced at fixed sites.

## **Local Aggregates Assessments and North East England's contribution to local and national need**

For the Mineral Planning Authorities Northumberland and Tyne and Wear, the provision in Local Aggregate Assessment has been based on a three year sales average for 2018, 2019 and 2021 recognising the increase in demand in recent years compared to the period pre-2013 and the impact of the restrictions to control the Coronavirus pandemic on sales in 2020 (although a ten year sales average has been used for sand and gravel from Northumberland). In County Durham, the provision in Local Aggregate Assessment is currently set out in the 2020 Joint Local Aggregate Assessment for County Durham, Northumberland and Tyne and Wear and is based on a three year sales average for 2017 to 2019. A 2021 Local Aggregate Assessment for County Durham is under preparation and will be finalised in early 2023. In Tees Valley the level of provision based on the recommended apportionment of the national and sub-national guidelines (2002 to 2020). The combined annual provision rate for the Local Aggregate Assessments in North East England is 5.7 million tonnes of crushed rock and 1.2 million tonnes of sand and gravel.

When compared with the ten year sales averages, the combined provision in the Local Aggregates Assessments has been found to exceed the ten sales averages for both crushed rock and sand and gravel. When compared with the annual equivalent of the published sub-national guidelines for North East England, the combined provision in the LAAs is below the guidelines for both sand and gravel and crushed rock. In respect to the current national and sub-national guidelines for aggregates provision, the North East England Aggregates Working Party considers these are now out-of-date and do not represent a robust basis for assessing whether North East England and its mineral planning authorities are making an appropriate contribution to local and wider needs. The North East Aggregates Working Party additionally considers that the guidelines are now in need of review.

On this basis the North East England Aggregates Working Party considers that the Local Aggregates Assessments are making an appropriate contribution to local and wider needs to ensure a steady and adequate supply of these materials. There is no undue reliance on other areas to meet needs within North East England, with the Aggregate Minerals Survey 2019 reporting sales of primary aggregates from North East England made up 97% of consumption in the region (Sales in 2019 were 7.3 million tonnes and consumption was 7.5 million tonnes). Notwithstanding this it is recognised there may be supply issues at a mineral planning authority level in future years as permitted reserves are worked out and existing planning permissions expire. It is therefore important to ensure that there are appropriate levels of permitted reserves and productive capacity to maintain supply to meet both local and national needs.

**Table 1      Dashboard key data summary**

Aggregate	Sales in 2021 (thousand tonnes)	Change in sales from previous year	10 year sales average (thousand tonnes)	3 year sales average (thousand tonnes)	Sales Trend (10 year)	LAA annual provision <sup>1</sup> (thousand tonnes)	Permitted reserves at 31 December 2021 (thousand tonnes)	Change in permitted reserves from previous year	Landbank (years)	Change in Landbank from previous years
Land won Sand and Gravel	1,097	↑	935	1,047	↑	1,217	13,913	↓	11.4	↓
Crushed Rock	5,952	↑	4,786	5,506	↑	5,706	176,424	↓	30.9	↓
Marine sand and gravel	797	↑	565	671	↑					
Total Primary Aggregates	7,846	↑	5,981	7,044	↑					
Secondary Aggregates	150.0	↑	318.3	150.0	↓					
Recycled Aggregates	776.7	↑	625.6	704.5	↑					

<sup>1</sup> This refers to the rate used to calculate the landbank.

# 1. North East England AWP Membership

The North East England Aggregates Working Party cluster covers around 850,000 hectares between the Scottish Borders to the north, Cumbria and North West England to the west, Yorkshire 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 East England is mostly rural in character and is more sparsely populated.

There are thirteen mineral planning authorities in the North East England Aggregates Working Party cluster (see Figure 1 below). This includes seven unitary authorities, five metropolitan borough authorities and one national park authority in four sub-regional clusters:

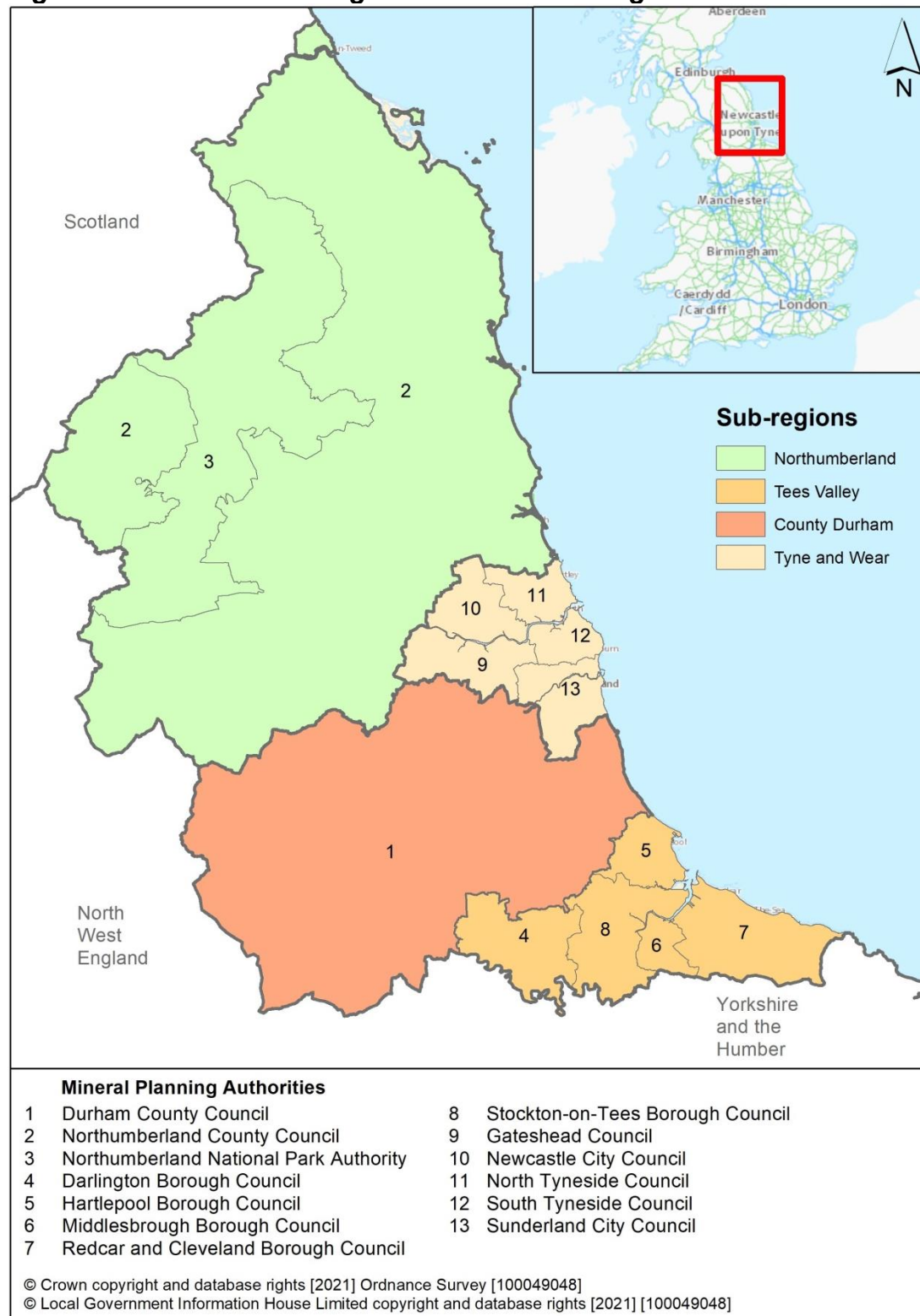
- County Durham (Durham County Council);
- Northumberland (Northumberland County Council and Northumberland National Park Authority);
- Tees Valley (Darlington Borough Council, Hartlepool Borough Council, Middlesbrough Council, Redcar and Cleveland Borough Council and Stockton on Tees Borough Council);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

In addition to representation from the thirteen Mineral Planning Authorities detailed above, the following organisations are members of the North East England AWP:

- Department for Levelling Up, Housing and Communities
- Marine Management Organisation
- The Crown Estate
- Aggregate Industries UK
- Minerals Products Association
- Aggregates Industries UK
- Breedon
- British Aggregates Association
- CEMEX UK
- Hanson Aggregates
- Mineral Products Association
- Tarmac

Appendix 1 of this report provides details of recent AWP meetings.

**Figure 1 North East England Mineral Planning Authorities**



## 2. Primary Aggregates

### Introduction

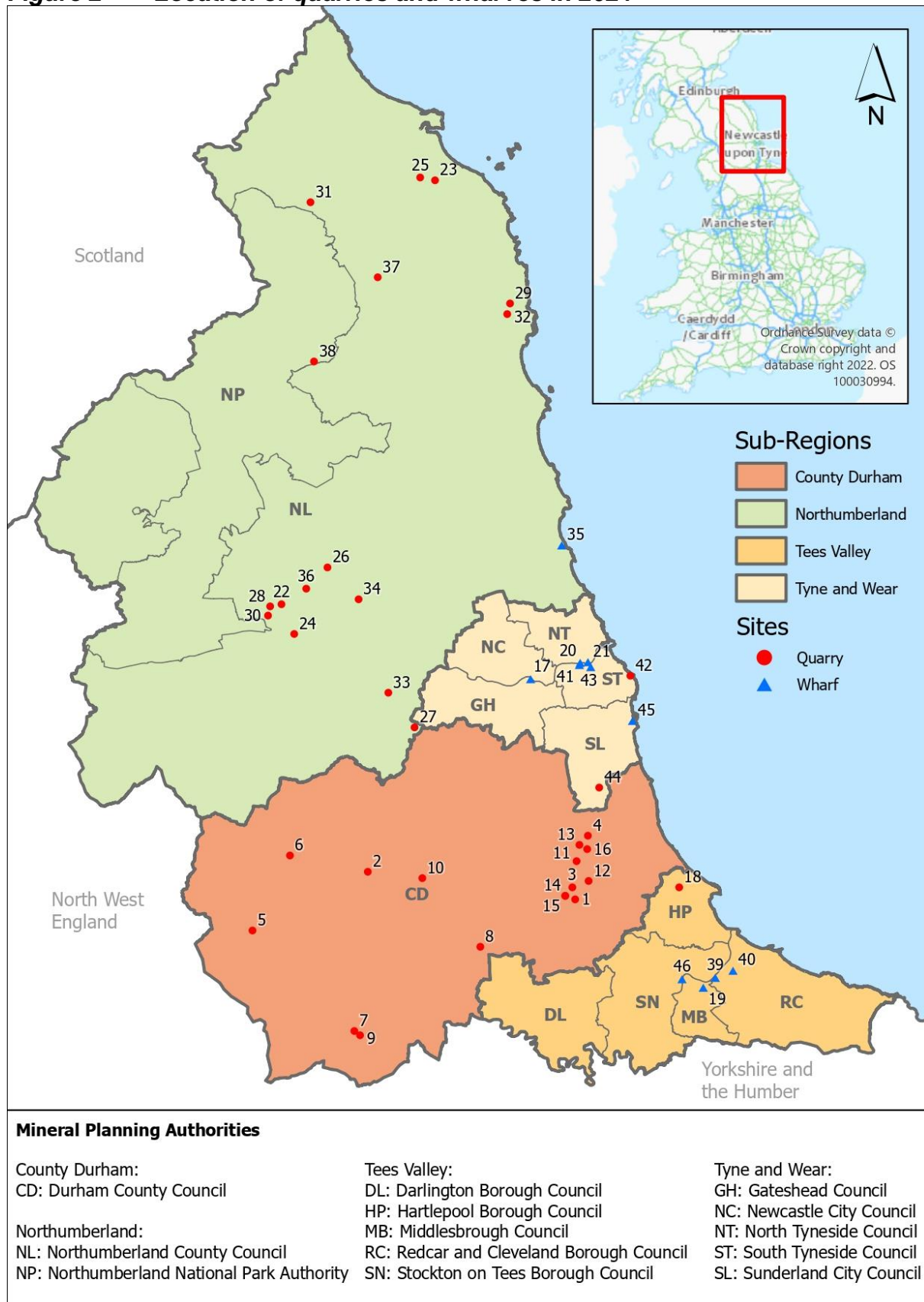
Each year the North East England Aggregates Working Party and the mineral planning authorities in the area undertake a survey to collect data on sales of primary aggregates from quarries and wharves during the preceding calendar year. The survey also collect data on the remaining reserves of primary aggregates at the end of the calendar year.

### Land Won Aggregates

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, dolerite, Permian sand and glacial and fluvial sand and gravel.

Figure 2 shows the location and distribution of quarries in North East England, as well as the wharves used to land marine dredged sand and gravel and crushed rock imported by sea.

**Figure 2** Location of quarries and wharves in 2021



Note: The numbers of each of the quarries and wharves shown here are cross referenced in Appendix 2.



## Marine Aggregates

In 2021 the marine dredged sand and gravel delivered to landing locations in North East England was sourced from licenced dredging areas in the Humber dredging region off the coast of Yorkshire and Lincolnshire. The locations of the licenced dredging areas in the Humber dredging region are shown in Figure 3. The landing locations include those at the Port of Blyth in Northumberland, the River Tyne and the River Tees.

**Figure 3** *Location of offshore aggregate production areas in 2021*





## Sales of Primary Aggregates

Information on sales of primary aggregates from quarries in North East England is provided in Table 2. This includes a breakdown of sales of crushed rock and sand and gravel for aggregate uses from quarries in North East England. It also includes sales of marine dredged sand and gravel landed at wharves in North East England and crushed rock imported by sea landed at wharves in North East England.

In 2021 total primary aggregate sales from North East England were 7.85 million tonnes. This was made up of 1.1 million tonnes of land won sand and gravel, 5.95 million tonnes of crushed rock and 0.79 million tonnes of marine sand and gravel. The survey also recorded an additional contribution of 258,000 tonnes of crushed rock imported by sea to North East England in 2021.

Sales of primary aggregates from quarries and wharves in North East England in 2021 were higher than the sales recorded during 2020. This increase in sales from 2020 to 2021 is a result of increased demand compared to 2020 when restrictions to control the Coronavirus pandemic led construction sites and some operational quarries temporarily closing for a period from March 2020. Prior to 2020 the figures in Table 2 show sales had generally been increasing over the period since 2012, which reflects recovering levels of construction activity and demand for primary aggregates following the 2007 economic downturn. County Durham and Northumberland continue to supply a significant proportion of land-won sand and gravel and crushed rock sales from North East England.

At a local level, sales for crushed rock and sand and gravel have generally followed the pattern of sales observed across North East England as a whole, with the three year sales averages being above the ten year average reflecting this increase in sales. However, in respect to sand and gravel sales from quarries, the three year sales average from Northumberland is below the ten year sales average reflecting a decrease in sales after 2017. It is considered that this reflects a reduction in the number of operational sites and associated reduction in production capacity in Northumberland over this period and sites beginning to work out their permitted reserves. In County Durham, there has been a notable increase in sand and gravel sales from quarries in this area over the ten year period and since 2016 and 2017 (330,000 tonnes in 2017 compared with 553,000 tonnes in 2020). This increase is principally due to production at Low Harperley Quarry commencing from 2017 onwards and increased production of sand at Quarrington Quarry.

Sales of marine dredged sand and gravel from wharves in North East England have similarly increased over the ten year period. An increase in landings on the River Tees mainly accounts for the level of increase from 2020 to 2021. Imports of crushed rock by sea continue to make a small contribution to overall sales of crushed rock for aggregate uses from North East England.

North East England Aggregates Working Party

**Table 2 Primary Aggregate Sales and Imports in North East England**

	2012	2013	2014	2015	2016	2017	2018	2019	2020	2021	10 year average	3 year average
<b>Sand and Gravel</b>												
Durham	199	218	276	256	322	330	446	537	419	553	355.6	503.0
Northumberland County	349	320	361	420	436	405	352	312	276	303	353.4	297.7
Northumberland National Park	0	0	0	0	0	0	0	0	0	0	0	0
Darlington	0	0	0	0	0	0	0	0	0	0	0	0
Hartlepool	0	0	0	0	0	0	0	0	0	0	0	0
Middlesbrough	0	0	0	0	0	0	0	0	0	0	0	0
Redcar and Cleveland	0	0	0	0	0	0	0	0	0	0	0	0
Stockton on Tees	0	0	0	0	0	0	0	0	0	0	0	0
Gateshead	0	0	0	0	0	0	0	0	0	0	0	0
Newcastle	0	0	0	0	0	0	0	0	0	0	0	0
North Tyneside	0	0	0	0	0	0	0	0	0	0	0	0
South Tyneside	0	0	0	0	0	0	0	0	0	0	0	0
Sunderland	c	c	c	c	c	c	c	c	c	c	c	c
<b>Total sand and gravel sales</b>	<b>713</b>	<b>716</b>	<b>873</b>	<b>917</b>	<b>972</b>	<b>955</b>	<b>1,047</b>	<b>1,099</b>	<b>946</b>	<b>1,097</b>	<b>933.5</b>	<b>1,047.2</b>
<b>Crushed Rock</b>												
Durham	1,696	2,245	2,654	2,770	2,990	2,636	3,484	3,256	2,591	3,220	2,754.2	3,022.4
Northumberland County	1,233	1,060	1,171	1,473	1,708	1,768	1,641	1,742	1,861	2,217	1,488.7	1,748.0
Northumberland National Park	c	c	c	c	c	c	c	c	c	c	c	c
Darlington	0	0	0	0	0	0	0	0	0	0	0	0
Hartlepool	c	c	c	c	c	c	c	c	c	0	0	0
Middlesbrough	0	0	0	0	0	0	0	0	0	0	0	0
Redcar and Cleveland	0	0	0	0	0	0	0	0	0	0	0	0
Stockton on Tees	0	0	0	0	0	0	0	0	0	0	0	0
Gateshead	0	0	0	0	0	0	0	0	0	0	0	0
Newcastle	0	0	0	0	0	0	0	0	0	0	0	0
North Tyneside	0	0	0	0	0	0	0	0	0	0	0	0
South Tyneside	c	c	c	c	c	c	c	c	c	c	c	c
Sunderland	c	c	c	c	c	c	c	c	c	c	c	c
<b>Total crushed rock sales</b>	<b>3,181</b>	<b>3,569</b>	<b>4,162</b>	<b>4,533</b>	<b>5,356</b>	<b>4,808</b>	<b>5,735</b>	<b>5,556</b>	<b>5,010</b>	<b>5,925</b>	<b>4,786.2</b>	<b>5,506.0</b>

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	2012	2013	2014	2015	2016	2017	2018	2019	2020	2021	10 year average	3 year average
<b>Marine Sand and Gravel</b>												
Durham	0	0	0	0	0	0	0	0	0	0	0	0
Northumberland County	0	c	c	c	c	c	c	c	c	c	c	c
Northumberland National Park	0	0	0	0	0	0	0	0	0	0	0	0
Darlington	0	0	0	0	0	0	0	0	0	0	0	0
Hartlepool	0	0	0	0	0	0	0	0	0	0	0	0
Middlesbrough	c	c	c	c	c	c	c	c	c	c	c	c
Redcar and Cleveland	0	0	0	0	0	0	0	c	c	c	c	c
Stockton on Tees	0	0	0	0	0	0	0	0	0	0	0	0
Gateshead	0	0	0	0	0	0	0	0	0	0	0	0
Newcastle	0	0	0	0	0	0	0	0	0	0	0	0
North Tyneside	c	c	0	0	0	0	0	0	0	0	0	0
South Tyneside	c	c	c	c	c	c	c	c	c	c	c	c
Sunderland	c	c	c	c	0	0	0	0	0	0	0	0
<b>Total Marine Sand and Gravel</b>	<b>491</b>	<b>451</b>	<b>537</b>	<b>595</b>	<b>499</b>	<b>535</b>	<b>525</b>	<b>633</b>	<b>582</b>	<b>798</b>	<b>564.6</b>	<b>671.0</b>
<b>Total Aggregate Sales</b>	<b>4,385</b>	<b>4,736</b>	<b>5,572</b>	<b>6,045</b>	<b>6,827</b>	<b>6,298</b>	<b>7,307</b>	<b>7,288</b>	<b>6,538</b>	<b>7,846</b>	<b>5,980.7</b>	<b>7,044.3</b>
<b>Imports of crushed rock by sea (from outside of England and Wales)</b>												
Durham	0	0	0	0	0	0	0	0	0	0	0	0
Northumberland County	0	c	c	c	0	0	0	0	0	0	c	c
Northumberland National Park	0	0	0	0	0	0	0	0	0	0	0	0
Darlington	0	0	0	0	0	0	0	0	0	0	0	0
Hartlepool	0	0	0	0	0	0	0	0	0	0	0	0
Middlesbrough	0	0	0	0	0	0	0	0	0	0	0	0
Redcar and Cleveland	0	0	0	0	0	0	0	c	c	c	c	c
Stockton on Tees	0	0	0	0	0	0	0	0	0	0	0	0
Gateshead	0	0	0	0	0	0	0	0	0	0	0	0
Newcastle	0	0	0	0	0	0	0	0	0	0	0	0
North Tyneside	0	0	0	0	c	c	c	c	c	c	c	c
South Tyneside	0	0	0	0	c	0	0	c	c	c	c	c
Sunderland	c	c	c	c	0	0	0	0	0	0	c	c
<b>Total Imports</b>	<b>73</b>	<b>160</b>	<b>148</b>	<b>145</b>	<b>246</b>	<b>98</b>	<b>107</b>	<b>244</b>	<b>117</b>	<b>258</b>	<b>159.6</b>	<b>206.2</b>

*North East England Aggregates Working Party*

Notes:

Figures in thousand tonnes

c = confidential figure

Sales figures for Durham for 2019 and 2020 differ from the figures published in earlier reports as a result of further data validation

## Permitted Reserves and Infrastructure Capacity

The permitted reserves of crushed rock and sand and gravel for aggregate uses at quarries in North East England as at 31 December 2021 are set out in Table 3(a) and Table 3(b). Permitted reserves recorded on an annual basis from 2012 to 2021 are also detailed for these resources.

The permitted reserves of crushed rock for aggregate uses in site in North East England at 31 December 2021 were 176.4 million tonnes. This represents a decrease in permitted reserves from 195.3 million tonnes in 2020, which is principally accounted for by sales during 2021 and a change in the reported reserves at Force Garth Quarry in County Durham. A large proportion of the permitted reserves of crushed rock in North East England are found at quarries in County Durham (53%) and Northumberland (43%), with the remaining reserves found at the quarries in Hartlepool, South Tyneside and Sunderland (4%).

The permitted reserves of sand and gravel for aggregate use in North East England at 31 December 2021 were 13.9 million tonnes. The decrease in reserves from 2020 to 2021 is broadly in line with sales over this period. A large proportion of the permitted reserves of crushed rock in North East England are found at quarries in County Durham, Northumberland and a single quarry in Sunderland.

Tables 3(a) and 3(b) also show that there has been a general decline in permitted reserves of sand and gravel at quarries in North East England since 2015 with the reserves in 2020 being the lowest recorded over the ten year period since 2012. This is largely due to a combination of a drawdown on reserves due to sales that have been at a greater rate than new planning permissions over this period and some downward reassessment of reserves by some site operators. There are site allocations in Local Plans and emerging Local Plan documents (Table 8), as well as planning applications that were pending a decision at 31 December 2021 (Table 9), which have the potential to supplement existing permitted reserves if planning permission is granted.

Table 4 provides figures on the capacity of the wharves used to land marine sand and gravel in North East England in 2021. It indicates a capacity of 1.6 million tonnes for the landing of marine sand and gravel. This data has not been collected by the North East Aggregates Working Party in previous years, so it is not possible to provide a commentary on changes in capacity over this period.

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**Table 3(a) Permitted Reserves in North East England – Sand and Gravel**

	2012	2013	2014	2015	2016	2017	2018	2019	2020	2021
<b>Durham</b>	6,679	8,924	8,651	8,354	7,610	7,113	6,474	5,600	5,247	4,636
<b>Northumberland County</b>	8,331	7,728	7,414	7,337	6,045	5,410	5,104	5,585	4,594	4,107
<b>Northumberland National Park</b>	0	0	0	0	0	0	0	0	0	0
<b>Darlington</b>	0	0	0	0	0	0	0	0	0	0
<b>Hartlepool</b>	0	0	0	0	0	0	0	0	0	0
<b>Middlesbrough</b>	0	0	0	0	0	0	0	0	0	0
<b>Redcar and Cleveland</b>	0	0	0	0	0	0	0	0	0	0
<b>Stockton on Tees</b>	0	0	0	0	0	0	0	0	0	0
<b>Gateshead</b>	0	0	0	0	0	0	0	0	0	0
<b>Newcastle</b>	0	0	0	0	0	0	0	0	0	0
<b>North Tyneside</b>	0	0	0	0	0	0	0	0	0	0
<b>South Tyneside</b>	0	0	0	0	0	0	0	0	0	0
<b>Sunderland</b>	c	c	c	c	c	c	c	c	c	c
<b>Total Sand and Gravel Permitted Reserves</b>	<b>17,551</b>	<b>20,220</b>	<b>18,198</b>	<b>23,571</b>	<b>21,315</b>	<b>19,956</b>	<b>18,752</b>	<b>16,830</b>	<b>15,261</b>	<b>13,913</b>
Notes: c = confidential figure Figures in thousand tonnes										

**Table 3(b) Permitted Reserves in North East England – Crushed rock**

	2012	2013	2014	2015	2016	2017	2018	2019	2020	2021
<b>Durham</b>	134,065	140,732	138,346	138,326	131,390	130,745	122,259	111,060	109,671	93,924
<b>Northumberland County</b>	77,264	76,643	77,972	83,991	82,917	81,016	78,520	80,070	78,681	76,086
<b>Northumberland National Park</b>	c*	c*	c*	c*	c*	c*	c*	c*	c*	c*
<b>Darlington</b>	0	0	0	0	0	0	0	0	0	0
<b>Hartlepool</b>	c+	c+	c+	c+	c+	c+	c+	c+	c+	c+
<b>Middlesbrough</b>	0	0	0	0	0	0	0	0	0	0
<b>Redcar and Cleveland</b>	0	0	0	0	0	0	0	0	0	0
<b>Stockton on Tees</b>	0	0	0	0	0	0	0	0	0	0
<b>Gateshead</b>	0	0	0	0	0	0	0	0	0	0
<b>Newcastle</b>	0	0	0	0	0	0	0	0	0	0
<b>North Tyneside</b>	0	0	0	0	0	0	0	0	0	0
<b>South Tyneside</b>	c+	c+	c+	c+	c+	c+	c+	c+	c+	c+
<b>Sunderland</b>	c+	c+	c+	c+	c+	c+	c+	c+	c+	c+
<b>Total Crushed Rock Permitted Reserves</b>	<b>214,528</b>	<b>220,373</b>	<b>219,117</b>	<b>230,950</b>	<b>222,482</b>	<b>220,668</b>	<b>209,224</b>	<b>198,033</b>	<b>195,348</b>	<b>176,424</b>

Notes:

c\* = Confidential figure. Crushed rock reserves for Northumberland National Park are included in the figure for Northumberland County Council.

c+ = Confidential figure. Crushed rock reserves for Hartlepool, South Tyneside and Sunderland are included in the figure for total crushed rock reserves in North East England.

Figures in thousand tonnes

**Table 4 Infrastructure Capacity – Landing wharves for marine sand and gravel**

	2012	2013	2014	2015	2016	2017	2018	2019	2020	2021
Durham										0
Northumberland County										100
Northumberland National Park										0
Darlington										0
Hartlepool										0
Middlesbrough										250
Redcar and Cleveland										300
Stockton on Tees										0
Gateshead										300
Newcastle										0
North Tyneside										250
South Tyneside										500
Sunderland										0
<b>Total wharf capacity</b>										<b>1,700</b>
<b>Total infrastructure capacity</b>										<b>1,700</b>
Notes: Figures in thousand tonnes C = confidential figure No data available for 2012 to 2020										



## Landbanks in North East England

Landbanks of aggregate mineral reserves are principally a monitoring tool to provide a mineral planning authority with early warning of possible disruption to the provision of a steady and adequate supply of land-won aggregates in their particular area.

In planning for the supply of aggregates, mineral planning authorities should use the landbank principally as an indicator of the security of aggregate minerals supply, and to indicate the additional provision that needs to be made for new aggregate extraction and alternative supplies in mineral plans (NPPF, Paragraph 213e). The NPPF specifies that landbanks of at least 7 years should be maintained for sand and gravel and landbanks of at least 10 years should be maintained for crushed rock (NPPF, Paragraph 213f).

The landbanks of permitted reserves for North East England on 31 December 2021 are shown in Table 5. The landbanks have been calculated using both the provision set out in the most up-to-date Local Aggregates Assessments for the relevant mineral planning authorities. For North East England as a whole, a landbank of 11.4 years has been calculated for sand and gravel and 30.4 years for crushed rock.

For some areas of North East England the mineral planning authorities have joint landbanks. Northumberland County Council and Northumberland National Park Authority have joint landbanks for the Northumberland sub-area, and both the five Tees Valley authorities and the five Tyne and Wear authorities have joint landbanks for their respective sub-areas. This is due to there being a limited number of sites in some of the individual mineral planning authority areas which means reserves data has to be combined with that from other areas to avoid disclosing commercially sensitive data for individual sites. In the case of the Tees Valley authorities this also reflects the joint working arrangements for the minerals plan between these five mineral planning authorities.

For sand and gravel, Durham had a landbank of 10.6 years at 31 December 2021 and Northumberland (covering Northumberland County and Northumberland National Park) had a landbank 11.6 years at 31 December 2021. In respect of Tyne and Wear, the reserve and landbank information cannot be published in this report as it would result in the disclosure of commercially sensitive data from the single site in this area, but the relevant Local Aggregates Assessment estimates there are 5.4 million tonnes of permitted reserves which equates to a landbank of 21.7 years at 31 December 2021. Within Tees Valley there are currently no quarries with a valid planning permission to extract sand and gravel for aggregate uses.

For crushed rock, Durham had a landbank of 29.2 years at 31 December 2021 and Northumberland had a landbank 40.8 years at 31 December 2021. There is only a single crushed rock producing quarry in the Tees Valley (located in Hartlepool Borough) and only two in Tyne and Wear (one in South Tyneside and one in Sunderland) so the actual reserve and landbank information for these areas cannot be published in this report as it would result in the disclosure of commercially sensitive data. The Local Aggregates Assessment covering Tees Valley does however estimate there are 1.4 million tonnes of permitted crushed rock reserves. In addition, the Local Aggregates Assessment covering Tyne and Wear estimates there are 5.3 million tonnes of permitted crushed rock reserves at the two sites which would equate to a landbank of 10.0 years at 31 December 2021.

**Table 5 Landbank in North East England**

	Sand and Gravel				Crushed Rock			
Mineral Planning Authority	10-year average sales (thousand tonnes)	LAA Rate (thousand tonnes)	Reserves (at 31 December 2021)	Landbank in years (at 31 December 2021)	10-year average sales (thousand tonnes)	LAA Rate (thousand tonnes)	Reserves (at 31 December 2021)	Landbank in years (at 31 December 2021)
Durham	355.6	438	4,636	10.6	2,754.2	3,220	93,924	29.2
Northumberland County and Northumberland National Park	353.4	354	4,107	11.6	1,587.4	1,867	76,085	40.8
Darlington, Hartlepool, Middlesbrough, Redcar and Cleveland, and Stockton on Tees	0.0	175	0	0.0	67.5*	187.5	1,445*	7.7*
Gateshead, Newcastle, North Tyneside, South Tyneside, South Tyneside and Sunderland	220.5+	250	5,420+	21.7+	391.1+	526	5,260+	10.0+
<b>AWP TOTAL</b>	933.5	1,217	13,913	11.4	4,786.2	5,800.5	176,424	30.4
<b>Notes:</b> + = Estimates taken from the Tees Valley Joint LAA 2021. Actual sales and reserves confidential. * = Estimates taken from the Tyne and Wear Joint LAA 2021. Actual sales and reserves confidential. AWP totals may not sum due to estimates being shown for some mineral planning authorities.								

## Imports and Exports

The national aggregate minerals survey, usually undertaken every 4 or 5 years, collects data on sales of aggregate minerals by destination. This provides information on flows of primary aggregates to other mineral planning authority areas within North East England as well as imports to and exports from North East England. The most recent national aggregate minerals survey was for 2019, with earlier surveys having been undertaken for 2014 and 2009.

The collation of results from the Aggregate Minerals Survey 2019 reports for North East England primary aggregates consumption was 7.5 million tonnes, compared with sales of 7.3 million tonnes. This indicates that sales of primary aggregates from North East England accounted for the equivalent of 97% of apparent consumption with North East England in 2019. This means North East England is a net importer of primary aggregates, rather than a net exporter.

87% of sales from sites in North East England were consumed within North East England (i.e. they were not exported and consumed elsewhere) with a further 13% of the aggregates minerals consumed being imported from outside North East England. These imports were principally from Yorkshire (72.6 % of the imported sand and gravel and 57.9% of the imported crushed rock), but also from North West England (27.4% of the imported sand and gravel and 12.5% of the imported crushed rock) and outside England and Wales (27.7% of the imported crushed rock).

While total imports (950,000 tonnes) of primary aggregates from North East England were higher than exports (740,000 tonnes), imports of sand and gravel were 292,000 and exports were 384,000 tonnes meaning North East England is a net exporter of this material. Imports of crushed rock to North East England were 658,000 tonnes and exports were 356,000 tonnes.

In addition, despite North East England being a net importer of primary aggregates, movements from North East England to other areas were recorded in 2019. The most significant movements are those to Yorkshire and the Humber.

## 3. Secondary and Recycled Aggregates

### Introduction

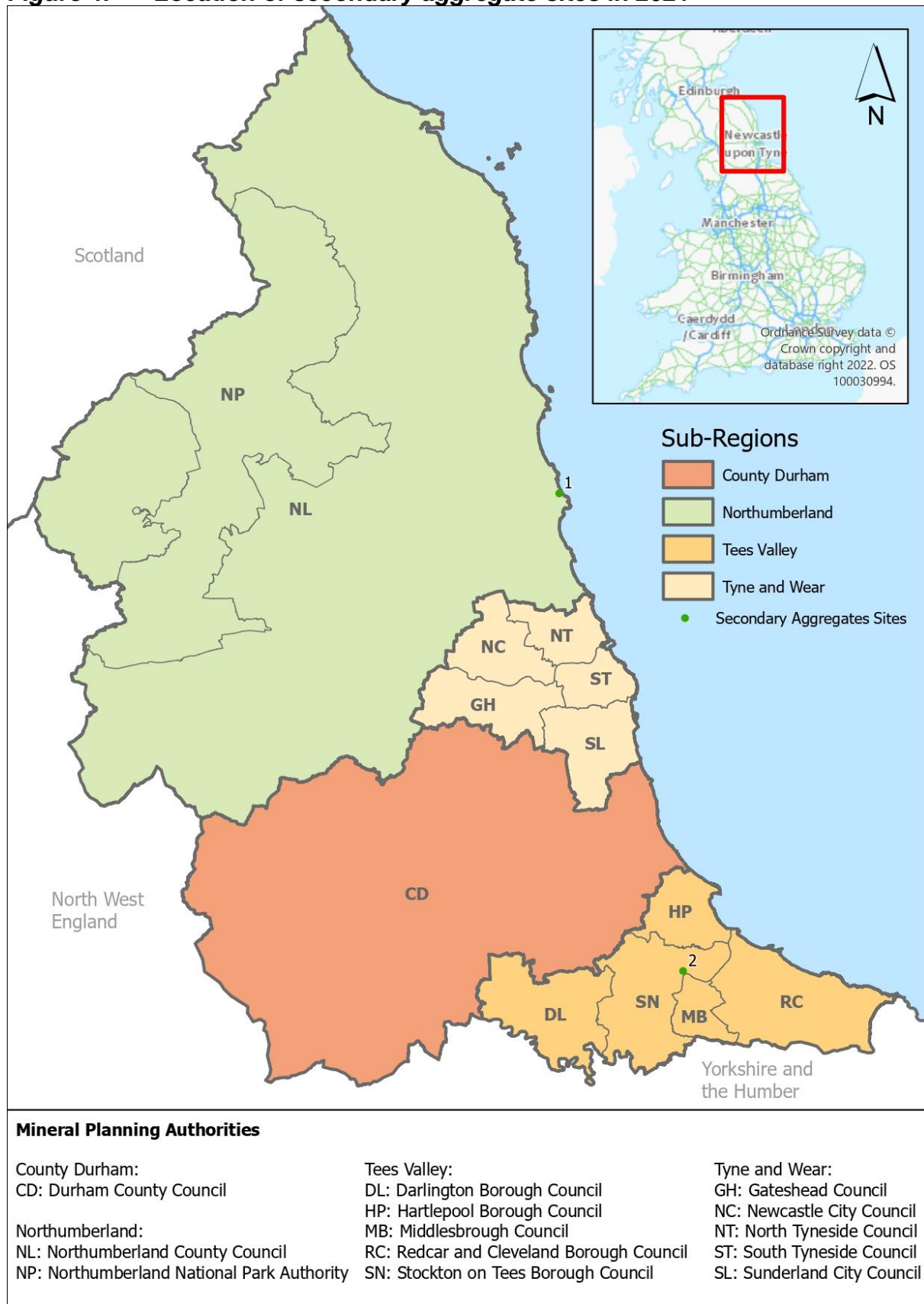
Secondary and recycled aggregates play an important role in the total supply of aggregates in North East England with various types of secondary and recycled aggregate materials suitable for aggregate use produced. The use of these types of aggregates has both environmental and economic benefits, driving the more sustainable use of resources by maximising the re-use of materials, minimising new extraction of mineral and diverting waste from landfill.

The 2021 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 as well as secondary aggregate producers in North East England. For sites that did not provide a return to the survey, estimates of production have been made. To help inform estimates of recycled aggregate production, data derived from the Waste Data Interrogator (published by the Environment Agency) has been used.

### Secondary Aggregates

In North East England, secondary aggregates are produced from industrial by-products, including pulverised fuel ash and incinerator bottom ash. Historically secondary aggregates have been produced from the Energy from Waste Plant at Haverton Hill on Teesside, the Redcar Steelworks site on Teesside and at Lynemouth Power Station in Northumberland. Following the closure of the Redcar Steelworks the use of slag to produce a secondary aggregate has now ceased. Secondary aggregates have not been produced from the Lynemouth Power Station site since 2016 but a planning permission does allow for the extraction of ash for aggregate uses until 2027 with 50 loaded lorries permitted to leave the site each day.

**Figure 4: Location of secondary aggregate sites in 2021**



Note: The numbers of each of the sites shown here are cross referenced in Appendix 3

North East England Aggregates Working Party

**Table 6a: Secondary Aggregate Sales in North East England**

	2012	2013	2014	2015	2016	2017	2018	2019	2020	2021	10 year average	3 year average
Durham County Council	0	0	0	0	0	0	0	0	0	0	0	0
Northumberland County Council and Northumberland National Park Authority	49.3	57.4	55.0	71.3	0	0	0	0	0	0	23.3	0
Tees Valley (Darlington, Hartlepool, Middlesbrough, Redcar and Cleveland, Stockton on Tees)	492.0	497.8	484.8	474.6	147.2	214.6	186.2	153.0	149.6	150.0	295.0	150.1
Tyne and Wear (Gateshead, Newcastle, North Tyneside, South Tyneside, Sunderland)	0	0	0	0	0	0	0	0	0	0	0	0
<b>Total Secondary Aggregate Sales</b>	541.3	555.2	539.8	545.9	147.2	214.6	186.2	153.0	149.6	150.0	318.3	150.1

## Recycled Aggregates

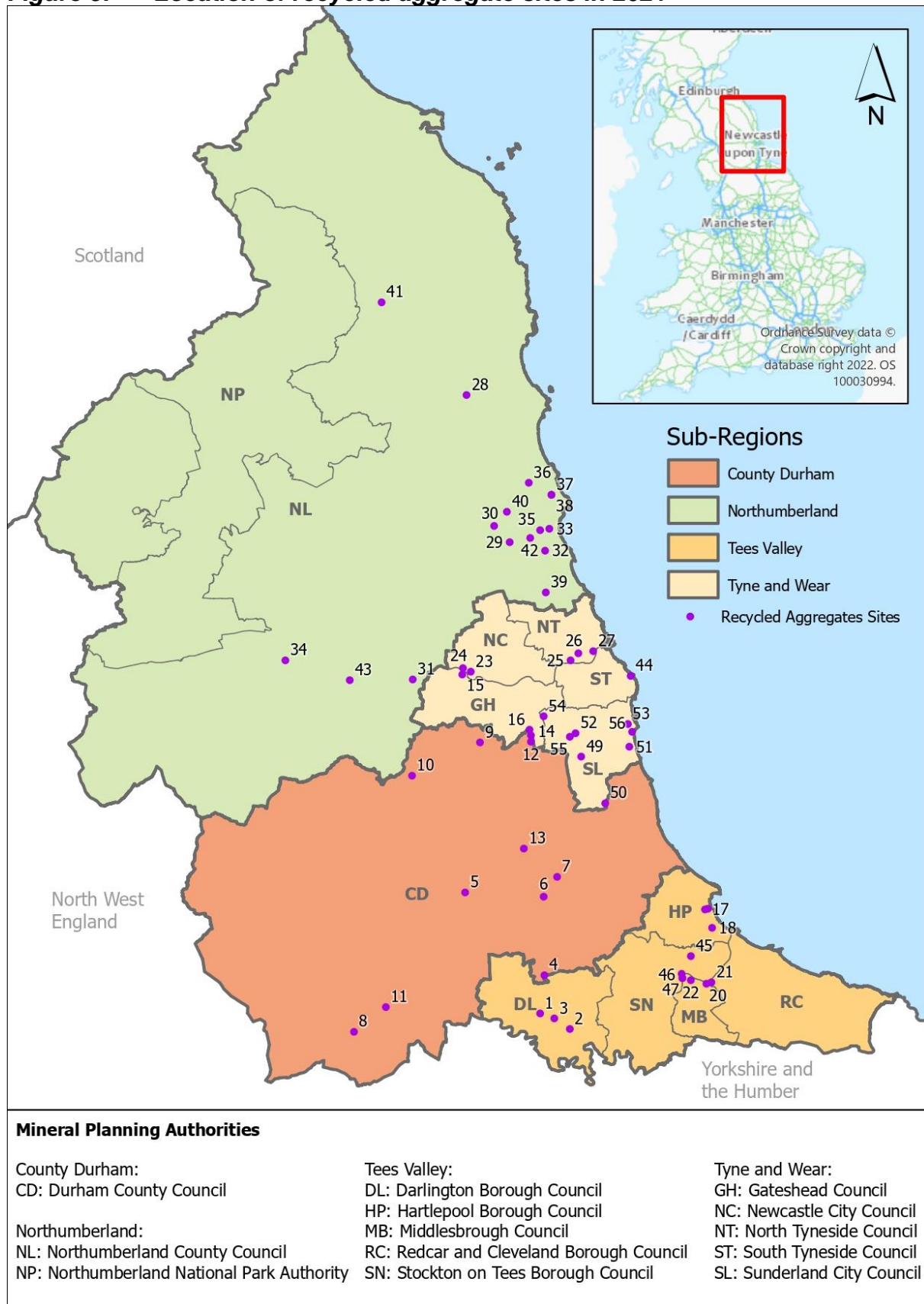
Recycled aggregates are derived from construction, demolition and excavation wastes that have been reprocessed to provide materials suitable for aggregate uses. They include materials such as stone, concrete, brick or asphalt. A significant amount of recycled aggregates are produced on development and construction sites involving mobile plant, whilst others are processed at dedicated freestanding sites or facilities located within existing minerals and waste sites. Within North East England, recycled aggregates are produced principally from construction and demolition projects whilst materials derived from spent railway ballast and recovered asphalt planings also make a significant contribution to supply.

Table 6b shows a steady decline in sales of recycled aggregates between 2012 and 2018, followed by a sharp rise in 2019. It should be noted that the methodology used to calculate sales was amended at this point, with data used from the Waste Data Interrogator to assess the accuracy of estimates used when operators failed to provide returns, as well as to identify other sites that may not have been surveyed. This identified a significantly larger amount of recycled aggregate sales occurring in the Tees Valley than had previously been thought. These higher levels of sales have been evident in subsequent years also, with sales in 2021 the highest recorded since 2012.

The figures do not include production from mobile crushers and screens which are known to make a contribution in terms of the quantities of construction and demolition waste recycled for aggregate uses. Further work is required to understand more clearly the proportion of supply this contributes but it is thought that this could be an additional 20% to that produced at fixed sites.

The figures for production of recycled aggregates need to be treated with a degree of caution. The figures also include estimates of production from those fixed sites where survey returns have not been received and the method to derive estimated figures from the Environment Agency's Waste Data Interrogator make assumptions that certain materials have utilised to produce recycled aggregates. The figures also do not include production from 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.

**Figure 5: Location of recycled aggregate sites in 2021**



*Note: The numbers of each of the sites shown here are cross referenced in Appendix 4*



**Table 6b: Estimated Recycled Aggregates in North East England**

	2012	2013	2014	2015	2016	2017	2018	2019	2020	2021	10 year average	3 year average
Durham County Council	128.2	95.2	61.3	59.4	58.7	61.3	62.1	67.8	123.5	111.0	82.9	100.7
Northumberland County Council and Northumberland National Park Authority	71.7	68.6	67.0	68.0	77.2	124.0	97.5	130.2	89.6	101.4	89.5	107.1
Tees Valley (Darlington, Hartlepool, Middlesbrough, Redcar and Cleveland, Stockton on Tees)	31.0	30.0	30.0	30.0	40.6	48.9	48.9	179.4	133.2	205.4	77.7	172.7
Tyne and Wear (Gateshead, Newcastle, North Tyneside, South Tyneside, Sunderland)	545.8	508.9	516.7	336.7	306.9	306.9	261.4	314.9	297.3	359.9	375.5	324.0
<b>Total Estimated Recycled Aggregates</b>	<b>776.7</b>	<b>702.7</b>	<b>675.0</b>	<b>494.1</b>	<b>483.4</b>	<b>541.1</b>	<b>310.3</b>	<b>692.3</b>	<b>643.6</b>	<b>776.7</b>	<b>625.6</b>	<b>704.5</b>

## 4. Trends and Analysis

### **Primary aggregates sales**

Sales of primary aggregates from quarries and wharves in North East England in 2021 were higher than the sales recorded during 2020 and broadly equivalent to sales recorded in 2019. The decrease in sales from 2019 to 2020 and the subsequent increase in 2021 is principally a result of the restrictions to control the Coronavirus pandemic in 2020, which led construction sites and some operational quarries temporarily closing for a period from March 2020. This increase in sales from 2020 to 2021 is indicative of the strong demand for primary aggregates during 2021.

Prior to 2020, sales of primary aggregates from sites in North East England had generally been increasing over the period since 2012 when lower sales were recorded due to the 2007 economic downturn and a resulting reduction in demand for construction aggregates. Over that period, for example, sales of primary aggregates from quarries in North East England increased from 4.4 million tonnes in 2012 to 7.8 million tonnes in 2021 reflecting growth in construction activity over the period following the economic downturn.

At a local level, sales for crushed rock and sand and gravel have generally followed the pattern of sales observed across North East England as a whole, with the three year sales averages being above the ten year average reflecting this increase in sales. However, in respect to sand and gravel sales from quarries, the three year sales average from Northumberland is below the ten year sales average reflecting a decrease in sales after 2017. It is considered that this reflects a reduction in the number of operational sites in Northumberland over this period and sites beginning to work out their permitted reserves, with no new reserves having been permitted. In County Durham, there has been a notable increase in sand and gravel sales from quarries this area over the ten year period and since 2016 and 2017 (330,000 tonnes in 2017 compared with 553,000 tonnes in 2021). This increase is principally due to production at Low Harperley Quarry commencing from 2017 onwards and increased production of sand at Quarrington Quarry in recent monitoring periods.

Sales of marine dredged sand and gravel from wharves in North East England have similarly increased over the ten year period. An increase in landings on the River Tees mainly accounts for the level of increase from 2020 to 2021. Some previously active wharves remained inactive during 2021.

The collation of results from the Aggregate Minerals Survey 2019 recorded imports and exports of primary aggregates to and from North East England. The levels of imports and exports were reasonably well balanced, but imports were higher than exports. It also reported that sales of primary aggregates from North East England accounted for the equivalent of 97% of apparent consumption with North East England in 2019. This means North East England is a net importer of primary aggregates in 2019, rather than a net exporter.

Imports of crushed rock by sea continue to make a small contribution to overall sales of crushed rock for aggregate uses from North East England. While the contribution is

relatively small compared to overall sales, it provides a supply of materials for uses such as roadstone to sites in the Tyne and Wear conurbation, for example, where number of quarries and the availability of the resource is more limited.

### **Primary aggregate reserves**

In North East England reserves of sand and gravel for aggregate uses decreased from 15.3 million tonnes in 2020 to 13.9 million tonnes at 31 December 2021. This decrease in permitted reserves was as a result of sales and no new planning permissions being granted in 2021. At 31 December 2021, Durham had permitted sand and gravel reserves of 4.6 million tonnes, which represents a landbank of 10.6 years, and Northumberland had permitted reserves of 4.1 million tonnes, which represents a landbank of 11.6 years. There are no permitted reserves of sand and gravel within the Tees Valley area and the permitted reserves within Tyne and Wear are contained in a single site in Sunderland. For North East England as a whole the 14.2 million tonnes of permitted reserves of sand and gravel represent a landbank of 11.4 years.

Reserves of crushed rock for aggregate uses in North East England decreased from 195.3 million tonnes in 2020 to 176.4 million tonnes in 2021. This decrease in permitted reserves was as a result of sales, no new planning permissions being granted in 2021 and a change in the reserves reported by the operator of Force Garth Quarry in County Durham. At 31 December 2021, Durham had permitted reserves of 93.9 million tonnes of crushed rock, which represents a landbank of 29.2 years, and Northumberland had permitted reserves of 76.1 million tonnes, which represents a landbank of 40.8 years. Permitted reserves of crushed rock within the Tees Valley area are contained in a single site in Hartlepool and the permitted reserves within Tyne and Wear are contained in two sites (one in South Tyneside and one in Sunderland).

For both sand and gravel and crushed rock, the permitted reserves recorded in 2021 were the lowest in the last ten monitoring periods and reflect a pattern of decreasing reserves in North East England since 2015. This is largely due to a combination of sales being at a greater rate than new reserves have been granted planning permission over this period and some downward reassessment of reserves by some site operators to take account of site specific geological and operational constraints.

### **Secondary and recycled aggregates**

In 2021 it is estimated that fixed construction and demolition recycling facilities and secondary aggregates producers contributed 776,700 tonnes of recycled aggregate and 150,000 tonnes of secondary aggregate to supply from North East England. Sources of recycled and secondary aggregates included construction, demolition and excavation wastes, recovered road planings, and ash from the Haverton Hill Energy from Waste Plant on Teesside.

This recycled and secondary aggregates sales figure should be treated with some degree of caution as not all producers in North East England responded to the survey and the figures include a large number estimates of production from some sites derived from the Environment Agency Waste Data Interrogator. 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.

## Major Construction Projects or Developments

Major construction projects and significant developments that could have a significant influence on demand for construction aggregates are detailed in Table 7.

The projects or developments that were taking place from 2014 onwards have contributed to the overall increase in sales when compared to sales in earlier years. The scale of the ongoing and future projects identified in Table 7 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. Projects such as the A1 dualling in Northumberland and the A66 dualling in North Yorkshire, County Durham and Cumbria are likely to result in increased supply from quarries in the north of Northumberland and the south of County Durham respectively during construction.

**Table 7 Major Construction Projects or Developments**

Project/Development Name and Location	Timescale (estimated start and end date)	Comments
A1 upgrade at Lobley Hill Gateshead	Construction commenced in summer 2014 and was completed in summer 2016.	Widening of existing dual carriageway to three lanes in each direction and upgrade of two junctions to include new parallel road links between the junctions.
Morpeth Northern Bypass Northumberland	Construction commenced in spring 2015 and was completed in April 2017.	3.8km of new single carriageway road
A1 Leeming to Barton North Yorkshire	Construction commenced in 2014 and completed in 2018.	12 mile section of dual carriageway with a new three lane motorway
A19 Silverlink junction improvements North Tyneside	Construction commenced in 2016 and completed in March 2019.	
International Advanced Manufacturing Park (IAMP) Sunderland and South Tyneside	Phase One underway	
A19 Testos and Downhill junction improvements South Tyneside	Construction commenced in Spring 2019 and was completed in early 2022.	
Potash Harbour Facilities Redcar and Cleveland	Consent granted. Construction commenced in 2019.	

Project/Development Name and Location	Timescale (estimated start and end date)	Comments
A1 Morpeth to Ellingham dualling Northumberland	Construction could start in 2024 if Development Consent Order granted.	Development Consent Order application submitted July 2020. Decision now expected by September 2023.
A66 dualling County Durham, Cumbria and North Yorkshire,	Construction to start in 2024/25.	Development Consent Order application submitted in Spring 2022 and was accepted in July 2022. A decision is expected in 2023.
A1 Birtley to Coal House widening Gateshead	Commenced - Summer 2021. End date - 2025	Widening of A1 to provide three lane carriageway and replacement of a railway bridge.
A1 Brunton to Scotswood widening Newcastle upon Tyne	Commenced - March 2020. End date - 2023	Widening of A1 within existing carriageway to provide three lanes
A19 Norton to Wynyard widening Stockton on Tees	Work commenced in March 2020 and was completed in November 2021.	Widening of existing dual carriageway to provide three lanes in each direction.
Teesside Combined Cycle Power Plant Redcar and Cleveland	Development Consent Order granted 5 April 2019.	
British Volt Gigafactory Northumberland	Planning permission granted July 2021.	Battery manufacturing plant covering 92.2 hectares with a main building of 256,000 square metres.

## Development Plans and Mineral Policies in North East England

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. The status and progress with the preparation of relevant local development plan documents in North East England is summarised in Table 6 and discussed in more detail below.

**Table 8 Minerals Plans Information**

Mineral Planning Authority / Authorities	Plan Name / Mineral DPD	Status	Change since previous annual monitoring report (Yes or no)	Comments	Estimated quantity of minerals allocated in Plan	
					Total sand and gravel  (Quantity from total permitted as at 31/12/2021)	Total crushed rock  (Quantity from total permitted as at 31/12/2021)
<b>Durham County Council</b>	County Durham Plan	Adopted October 2020	No		Not applicable	11,900,000 tonnes  (3,700,000 tonnes)
	Minerals and Waste Policies and Allocations	Publication Draft November 2022	No	Submission expected in May 2023	6,710,000 tonnes  (0 tonnes)	1,775,000 tonnes  (0 tonnes)
<b>Northumberland County Council</b>	Northumberland Local Plan	Adopted March 2022	Yes	Examination concluded following receipt of the Inspector's Report on 26 January 2022. Local Plan adopted on 31 March 2022.	9,000,000 tonnes  (0 tonnes)	20,350,000 tonnes  (175,000 tonnes)
<b>Northumberland National Park Authority</b>	Northumberland National Park Local Plan	Adopted July 2020	No		Not applicable	Not applicable
<b>Darlington, Hartlepool, Middlesbrough, Redcar and Cleveland, and Stockton on Tees Borough Councils</b>	Tees Valley Joint Minerals and Waste Core Strategy and Tees Valley Joint Minerals and Waste Policies and Sites	Adopted 2011	No		Not applicable	1,320,000 tonnes  (1,320,000 tonnes)

## North East England Aggregates Working Party

Mineral Planning Authority / Authorities	Plan Name / Mineral DPD	Status	Change since previous annual monitoring report (Yes or no)	Comments	Estimated quantity of minerals allocated in Plan	
					Total sand and gravel  (Quantity from total permitted as at 31/12/2021)	Total crushed rock  (Quantity from total permitted as at 31/12/2021)
<b>Gateshead Council</b>	Core Strategy and Urban Core Plan for Gateshead and Newcastle	Adopted March 2015	No	Review undertaken in 2020. The review concluded that there is currently no need to update this DPD.	Not applicable	Not applicable
	Making Spaces for Growing Places (Site Allocations and Development Management Policies)	Adopted February 2021	No		Not applicable	Not applicable
<b>Newcastle City Council</b>	Core Strategy and Urban Core Plan for Gateshead and Newcastle	Adopted March 2015	No	Review undertaken in 2020. The review concluded that there is currently no need to update this DPD.	Not applicable	Not applicable
	Development and Allocations Plan	Adopted June 2020	No		Not applicable	Not applicable
<b>North Tyneside Council</b>	North Tyneside Local Plan	Adopted July 2017	No		Not applicable	Not applicable
<b>South Tyneside Council</b>	South Tyneside Local Plan	Draft Plan June 2022	Yes	Draft plan published for consultation in June 2022	Not applicable	Not applicable
<b>Sunderland City Council</b>	Core Strategy and Development Plan	Adopted January 2020	No		Not applicable	Not applicable
	Allocations and Designations Plan	Draft Plan December 2020	No		Not applicable	Not applicable
<b>Total</b>					<b>15,710,000 tonnes</b>  <b>(0 tonnes)</b>	<b>35,345,000 tonnes</b>  <b>(5,195,000 tonnes)</b>

The following paragraphs provide a summary of current development plan documents in North East England that are most relevant to aggregate minerals:

- Darlington, Hartlepool, Middlesbrough, Redcar and Cleveland, and Stockton on Tees Councils** 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. There are currently no formal proposals to undertake a review of these documents.

- **Durham County Council** adopted the County Durham Plan on 21 October 2020. The plan incorporates strategic policies on minerals extraction and two strategic mineral site allocations for aggregate minerals. A complimentary Minerals and Waste Policies and Allocations document is now under preparation to contain detailed development management policies and mineral site allocations. Early engagement work was undertaken in January and February 2021, a draft plan was consulted upon between September and November 2021, and consultation on a Publication Draft commenced in November 2022. It is anticipated that this document will be submitted in May 2023 with adoption expected in June 2024.
- **Gateshead Council** adopted a Joint Core Strategy and Urban Core Plan document in March 2015 and an allocations and development management policies document titled 'Making Spaces for Growing Places' on 1 February 2021. The latter document includes policies for minerals development and a policy to safeguard the wharf on the River Tyne at Gateshead.
- **Newcastle City Council** adopted a Joint Core Strategy and Urban Core Plan document in March 2015 and the Development and Allocations Plan on 24 June 2020.
- **North Tyneside Council** adopted a Local Plan in July 2017. The plan includes a strategic minerals policy.
- **Northumberland County Council** adopted a Local Plan in March 2022. The plan includes a specific policy on aggregate minerals, site allocations for the provision of sand and gravel and crushed rock for aggregate uses, a mineral safeguarding policy, a policy on mineral infrastructure safeguarding, and policies with criteria to assess planning applications for minerals development.
- **Northumberland National Park Authority** adopted a new Local Plan in July 2020. This supersedes the Core Strategy and Development Policies document that was adopted in March 2009. The Local Plan includes a policy for minerals development and a policy for mineral safeguarding.
- **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 underway to review these documents as part of Local Plan document. A revised draft Local Plan was published for consultation in June 2020, following a previous consultation on a draft plan in August 2019.



- **Sunderland City Council** adopted a Core Strategy and Development Plan document, which includes strategic policies, allocations and development management policies, on 30 January 2020. A draft allocations and designations document was published for consultation on 18 December 2020.

## Planning applications in North East England

The North East England Aggregates Working Party monitors the nature and outcome of planning applications for primary aggregates extraction in North East England on an annual basis. Table 9 summarises the planning applications submitted during 2021 and decisions on planning applications up to 31 December 2021.

During 2021 there were no relevant planning decisions but there were a number of applications that were submitted and/or were pending determination at 31 December 2021. The applications pending determination involve potential additional reserves 17,950,000 tonnes of crushed rock for aggregates uses and 6,350,000 tonnes of sand and gravel for aggregates used that currently do not have a valid planning permission for extraction.

The North East Aggregates Working Party is also aware that further relevant planning applications have been submitted in 2022. This includes an extension to Hulands Quarry in County Durham, an extension to Harden Quarry in the Northumberland National Park and a new site at Northside in Northumberland. These planning applications have not been included within the figures in Table 9, which reports the position as at 31 December 2021. These planning applications will be included in the annual report for 2022.

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**Table 9 Planning Applications and Decisions in North East England**

Mineral Planning Authority	Site Name	Grid Reference	Operator / Applicant	Type of Application	Mineral	Date Submitted	Decision date	Decision	Tonnage (for aggregate uses)	Planning permission end date
Durham County Council	Harrow and Ashy Bank Quarry, Eastgate	NY 956 395	Tarmac	Determination of modern conditions	Limestone	24 May 2007	Not applicable	Pending at 31/12/2021	3,750,000	Not applicable
	Hawthorn Quarry, Seaham	NZ 435 464	Tarmac	Determination of modern conditions	Limestone	10 May 2000	Not applicable	Pending at 31/12/2021	4,000,000	Not applicable
	Tuthill Quarry, Haswell	NZ 390 424	Owen Pugh	New site	Limestone	08 February 2017	Not applicable	Pending at 31/12/2021	2,500,000	Not applicable
Gateshead Council	Crawcrook Quarry, Crawcrook	NZ 138 637	SITA and CEMEX	Extension	Sand and gravel	26 September 1997	Not applicable	Pending at 31/12/2021	550,000	Not applicable
Northumberland County Council	Anick Grange Haugh, Hexham	NY 956 643	Thompsons of Prudhoe	New site	Sand and gravel	25 June 2021	Not applicable	Pending at 31/12/2021	5,800,000	Not applicable
	Divethill Quarry, Great Bavington	NY 980 789	Breedon	Extension	Crushed rock - Dolerite	30 October 2020	Not applicable	Pending at 31/12/2021	2,700,000	Not applicable
	Shiel Dykes Quarry, Newton on the Moor	NU 149 071	North East Concrete	New site	Crushed rock - Dolerite	07 September 2020	Not applicable	Pending at 31/12/2021	5,000,000	Not applicable

## Local Aggregate Assessments

Mineral Planning Authorities are required to prepare an annual Local Aggregate Assessment based on a rolling average of 10 years' sales data and other relevant local information, and an assessment of all supply options.

For 2021 Local Aggregates Assessments have been prepared covering Northumberland (Northumberland County Council and Northumberland National Park Authority), the five Tees Valley authorities (Darlington, Hartlepool, Middlesbrough, Redcar and Cleveland, and Stockton on Tees Borough Councils), and the five Tyne and Wear authorities (Gateshead, Newcastle, North Tyneside, South Tyneside, and Sunderland Councils). Local Aggregate Assessment for 2021 have yet to be prepared by Durham County Council and the five Tees Valley authorities (Darlington, Hartlepool, Middlesbrough, Redcar and Cleveland, and Stockton on Tees).

For Northumberland and Tyne and Wear, the suggested provision has been based on a three year sales average for 2018, 2019 and 2021 recognising the increase in demand in recent years compared to the period pre-2013 and the impact of the restrictions to control the Covid-19 pandemic on sales in 2020. The exception to this is the figure for sand and gravel in Northumberland which uses the ten year sales average. The Tees Valley Local Aggregates Assessment uses the apportionment of the national and sub-national guidelines (2006 to 2020). For Durham, the level of provision is as set out in the Local Aggregate Assessment for 2020. A 2021 LAA for Durham is expected to be finalised in early 2023.

**Table 10 2021 Local Aggregate Assessments in North East England**

Mineral Planning Authority	Complete (Yes or No)	LAA Figure		Calculation Method
		Sand and Gravel	Crushed Rock	
Durham	No+	438,000+	3,125,000+	Three year sales average (2017 to 2019)
Northumberland County and Northumberland National Park	Yes	354,000	1,867,000	Sand and gravel - Ten year average Crushed rock - Three year sales average (2018, 2019 and 2021)
Darlington, Hartlepool, Middlesbrough, Redcar and Cleveland, and Stockton on Tees	No  *Draft provided to AWP	175,000	187,500	Apportionment of the national and sub-national guidelines for 2006 to 2020
Gateshead, Newcastle, North Tyneside, South Tyneside, and Sunderland	Yes	250,000	526,000	Three year sales average (2018, 2019 and 2021)

Notes: + Figures for Durham have been taken from the 2020 Local Aggregates Assessment

## Summary

Over the ten-year period from 2012 to 2021 there has been a general upward trend in sales of primary aggregates. This reflects increasing levels of house building following economic downturn that affected sales from 2007 and a number of ongoing infrastructure projects of note. This level of house building is planned to continue in the coming years and infrastructure projects have been identified that will place a similar demand for aggregates to that experienced in previous years. A drop in sales was observed in 2020 and this was considered to be as a result of temporary restrictions put in place to control the coronavirus pandemic. Provision for aggregate minerals in North East England therefore should reflect these levels of activity.

At present the landbanks of crushed rock and sand and gravel are above the minimum landbanks of 10 years and 7 years respectively, based on the annual provision rates in the Local Aggregates Assessments. However, there is likely to be a shortfall in sand and gravel provision in future years as landbanks will fall below the minimum indicators in the short to medium-term based on current sales levels if further provision is not made. Crushed rock landbanks at the regional level are well above the landbank indicator, but they could fall below the minimum levels for some mineral planning authorities. The implications of the end dates of some existing planning permissions and the levels of remaining reserves at some individual sites will need careful consideration in some areas as could have a negative effect on supply.

There are planning applications currently pending a decision that have the potential to increase supply and landbanks in the short to medium-term. There are also local plans and emerging local plans with allocated sites that could make a contribution.

Marine sand and gravel provides an important contribution to the overall supply of sand and gravel from North East England. It is therefore important the relevant infrastructure capacity is safeguarded along with land won resources.

Recycled aggregates and secondary aggregates also make an important contribution to overall supply. However, there are some data deficiencies with the data on the supply of recycled aggregates.

Supply of aggregates minerals is relatively self-contained within the North East England with consumption broadly matching sales and imports matching exports. The most significant movements appear to be between North Yorkshire to the south of the region, where both imports and exports are observed. Within North East England, County Durham and Northumberland are net exporters to Tees Valley and Tyne and Wear where available resources are more limited in comparison and demand is strong.

The Annual Report shows that North East England has aggregates reserves (including provision in Local Plans) and infrastructure capacity to maintain an appropriate contribution to a steady and adequate supply in future years. However, this will in part be dependent on future provision being made particular where there could be shortfalls in some areas in the coming years.

## 5. Conclusions

The North East England Aggregates Working Party considers that the Local Aggregates Assessments are making an appropriate contribution to local and wider needs to ensure a steady and adequate supply of these materials.

At 31 December 2021, the reserves of crushed rock and land-won sand and gravel for aggregates uses for North East England as a whole were above the minimum landbank indicators of ten years and seven years respectively.

Notwithstanding the above, it is recognised there may be supply issues at a mineral planning authority level in future years as permitted reserves are worked out and existing planning permissions expire. It is therefore important to ensure that there are appropriate levels of permitted reserves and productive capacity to maintain supply in order to meet both local and national needs.

A range of planned infrastructure and significant construction projects in North East England that could influence demand for aggregates have been identified. It is considered that, while these developments could have an influence upon demand for materials locally, they are not nationally significant in terms of their influence on demand.

## Appendix 1: AWP Meetings

Meeting Date	Link to minutes of the meeting	Summary of Key Points
10 November 2022	<a href="#">Link to meeting notes - 10/11/2022</a>	<p>Update from DLUHC on recent political changes, progress with the Levelling Up and Regeneration Bill, indicative timescales for updates to the NPPF, update from the last meeting of the National Aggregates Co-ordinating Group and meetings with AWP secretaries.</p> <p>Annual Report (containing sales and reserves data for 2021) discussed and steps to finalise and publish agreed.</p> <p>Local Aggregate Assessments – Joint Local Aggregates Assessments for Northumberland and Tyne and Wear discussed and steps to provide feedback agreed. No Local Aggregate Assessment had been submitted by the five Tees Valley authorities or Durham County Council at the time of the meeting, but these will follow at a later date.</p> <p>Updates received from industry representatives, The Crown Estate and the Mineral Planning Authorities on Local Plans and current planning applications.</p> <p>Sales levels – Industry have observed strong sales level in 2021 and Q1 of 2022, but reported a decline for Q2 and Q3 of 2022 to levels below those recorded in 2019.</p> <p>Mineral Products Association shared work on aggregate supply and demand scenarios up to 2035 and their annual mineral planning survey which indicates a continued decline in reserves of primary aggregates.</p>
24 June 2022	<a href="#">Link to meeting notes - 24/06/2022</a>	<p>Work programme for 2022/23 – Update provide on the work programme for the year to include two meetings, annual survey and annual report, scrutiny of 2021 LAAs, participation in the National Aggregate Co-ordinating Group, liaison with DLUHC and providing consultation responses.</p> <p>Annual Survey and Report (sales and reserves data for 2021) – Update on progress and timetable for preparation of the draft report. Draft collation shared.</p> <p>Local Aggregates Assessments – Outline of timescales for submission of 2021 documents to the AWP.</p>

		<p>Updates received from industry representatives, The Crown Estate and the Mineral Planning Authorities on Local Plans and current planning applications.</p>
12 November 2021	<a href="#">Link to meeting notes - 12/11/2021</a>	<p>Update form DLUHC on change to department name and the new Secretary of State, work relating to planning reform and national guidelines for aggregates provision.</p> <p>Annual Report (containing sales and reserves data for 2020) discussed and steps to finalise and publish agreed.</p> <p>Local Aggregate Assessments – Joint Local Aggregate Assessment for County Durham, Northumberland and Tyne and Wear discussed and steps to provide feedback agreed. No Local Aggregate Assessment had been submitted by the five Tees Valley authorities at the time of the meeting.</p> <p>Permitted reserves – Discussion about when reserves should be included in the landbank. It was agreed the reserves should be included in the landbank following the grant of planning permission in circumstances where other permits may required before extraction can take place.</p> <p>Sales levels – Industry have observed strong sales level in 2021. Concerns that some nationally significant projects are resulting in a demand for resources that is impacting on availability to supply local projects.</p>
8 July 2021	<a href="#">Link to meeting notes - 08/07/2021</a>	<p>Agreed that Claire Teasdale should continue as Chair until at least 31 March 2025</p> <p>Changes to the AWP secretariat contracts were discussed, including changes to timelines, format of the annual report and national terms of reference. Changes aim to bring consistency across the AWP's and make comparisons between data easier.</p> <p>Update form MHCLG on work relating to planning reform/Planning White Paper and national guidelines for aggregates provision.</p> <p>National Terms of Reference – Discussed and comments collated. Agreed there was no need to add any locally specific specifications as the matters could be sufficiently covered by the National Terms of Reference.</p> <p>Draft collated sales and reserves data from the 2020 survey shared. Agreed to circulate Draft Annual Report at next meeting.</p>

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		<p><i>Local Aggregate Assessments – Key dates for drafting and submission to the AWP discussed and agreed.</i></p> <p><i>Impact of Clean Air Zones on viability of operational minerals sites where located within these areas.</i></p>
<b>4 December 2020</b>	<a href="#"><u>Link to meeting notes - 04/12/2020</u></a>	<p><i>Update provided on progress with the Aggregate Minerals Survey 2019.</i></p> <p><i>Planning for the Future – White Paper Consultation discussed by members, including the lack of reference to minerals planning in the document.</i></p> <p><i>Need for new national and sub-national guidelines for aggregates provision discussed.</i></p> <p><i>Joint LAA for County Durham, Northumberland and Tyne and Wear based on sales data for 2018 discussed.</i></p> <p><i>Agreed that future meetings of the North East England AWP should take place at least twice each year.</i></p>
<b>19 November 2019</b>	<a href="#"><u>Link to meeting notes - 19/11/2019</u></a>	<p><i>Arrangements for the national Aggregate Minerals Survey 2019 and the project steering group.</i></p> <p><i>The National and Sub-National Guidelines for Aggregates Provision were discussed. It was considered that there is a need for work to be undertaken to update these to ensure they are up-to-date and fit for purpose.</i></p> <p><i>Annual Report (containing 2018 sales and reserves data) agreed.</i></p> <p><i>Update on progress with Local Aggregates Assessments.</i></p> <p><i>Findings of the Mineral Products Association's Annual Mineral Survey were presented and discussed.</i></p> <p><i>Dewatering consent regime – Potential impact for the availability of permitted reserves discussed.</i></p>



## Appendix 2: Primary Aggregates Sites in North East England

Mineral Planning Authority	Site Name	Cross Reference to Figure 2	Type of site (Wharf, Quarry etc.)	Operator	Grid Reference	Mineral	Status	Planning Permission End Date
Durham County Council	Bishop Middleham Quarry	1	Quarry	Thompsons of Prudhoe	NZ 328 326	Magnesian limestone	Active	30/06/2029
	Broadwood Quarry	2	Quarry	Breedon	NZ 035 365	Carboniferous limestone	Active	21/02/2042
	Cornforth Quarry	3	Quarry	Tarmac	NZ 324 343	Magnesian limestone	Inactive	21/02/2042
	Crime Rigg Quarry	4	Quarry	Breedon	NZ 346 416	Magnesian limestone and Permian sand	Active	31/12/2022
	Force Garth Quarry (Middleton)	5	Quarry	Breedon	NY 872 282	Dolerite	Active	21/02/2042
	Heights Quarry	6	Quarry	Aggregate Industries	NY 925 388	Carboniferous limestone	Active	30/09/2046
	Hulands Quarry	7	Quarry	Aggregate Industries	NZ 016 140	Carboniferous limestone	Active	31/12/2026
	Hummerbeck Quarry	8	Quarry	Hall Construction Services	NZ 194 259	Sand and gravel	Inactive	21/02/2042
	Kilmond Wood Quarry	9	Quarry	Kearton Farms	NZ 024 134	Carboniferous limestone	Active	21/02/2042
	Low Harperley Quarry	10	Quarry	Breedon	NZ 112 356	Sand and gravel	Active	08/08/2032
	Quarrington Quarry	11	Quarry	Tarmac	NZ 330 380	Magnesian limestone and Permian sand	Active	21/02/2042
	Raisby Quarry	12	Quarry	Breedon	NZ 347 352	Magnesian limestone	Active	09/09/2042
	Running Waters Quarry	13	Quarry	Breedon	NZ 334 403	Magnesian limestone	Inactive	21/02/2042
	Thrislington Quarry (West)	14	Quarry	Tarmac	NZ 314 331	Magnesian limestone and Permian sand	Active	01/07/2045

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	Thrislington East Quarry	15	Quarry	Tarmac	NZ 327 336	Magnesian limestone and Permian sand	Active	15/01/2030
	Witch Hill Quarry	16	Quarry	Breedon	NZ 345 397	Magnesian limestone	Inactive	21/02/2042
Gateshead Council	Gateshead Wharf	17	Wharf	Tarmac	NZ 265 638	Sand and gravel	Inactive	Not applicable
Hartlepool Borough Council	Hart Quarry	18	Quarry	Breedon	NZ 475 345	Magnesian limestone	Inactive	21/02/2042
Middlesbrough Borough Council	Cochrane's Wharf	19	Wharf	Tarmac	NZ 509 202	Sand and gravel	Active	Not applicable
North Tyneside Council	Howdon Wharf	20	Wharf	Tarmac	NZ 335 661	Sand and gravel	Inactive	Not applicable
	Whitehill Point Wharf	21	Wharf	Northumbrian Roads Limited	NZ 344 661	Igneous rock	Active	Not applicable
Northumberland County Council	Barrasford Quarry	22	Quarry	Tarmac	NZ 913 743	Dolerite and Carboniferous limestone	Active	31/12/2038
	Belford Quarry	23	Quarry	Tarmac	NU 130 342	Dolerite	Inactive	31/12/2031
	Cocklaw Quarry	24	Quarry	Tynedale Roadstone	NY 931 701	Carboniferous limestone	Inactive	21/02/2042
	Cragmill Quarry	25	Quarry	Breedon	NU 109 346	Dolerite	Active	22/08/2040
	Divethill Quarry	26	Quarry	Breedon	NY 980 789	Dolerite	Active	31/12/2031
	Ebchester Quarry (Broadoak)	27	Quarry	Tarmac	NZ 101 569	Sand and gravel	Inactive	31/12/2023
	Haughton Strother Quarry	28	Quarry	Thompsons of Prudhoe	NY 897 740	Sand and gravel	Active	31/08/2022
	Howick Quarry	29	Quarry	Tarmac	NU 236 168	Dolerite	Active	31/12/2022
	Keepersfield Quarry	30	Quarry	Hanson	NY 894 727	Dolerite and Carboniferous limestone	Active	21/02/2042

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	Lanton (Cheviot) Quarry	31	Quarry	Tarmac	NT 954 311	Sand and gravel	Active	31/12/2028
	Longhoughton Quarry	32	Quarry	K W Purvis	NU 232 153	Dolerite and Carboniferous limestone	Active	31/12/2029
	Merryshields Quarry	33	Quarry	Thompsons of Prudhoe	NZ 064 618	Sand and gravel	Active	21/02/2042
	Mootlaw Quarry	34	Quarry	North Tyne Roadstone	NZ 022 750	Carboniferous limestone	Inactive	31/12/2025
	Port of Blyth - Battleship Wharf	35	Wharf	Breedon	NZ 309 827	Sand and gravel	Active	Not applicable
	Swinburne Quarry	36	Quarry	Hanson	NY 948 765	Dolerite	Active	31/12/2036
	Wooperton Quarry	37	Quarry	North East Concrete	NU 049 205	Sand and gravel	Active	31/12/2032
Northumberland National Park Authority	Harden Quarry	38	Quarry	Tarmac	NT 959 086	Mica-porphyrite	Active	31/10/2029
Redcar and Cleveland Borough Council	Tees Wharf	39	Wharf	Shire Aggregates	NZ 526 216	Sand and gravel	Active	Not applicable
	Teesport	40	Wharf	Aggregate Industries	NZ 551 226	Igneous rock	Active	Not applicable
South Tyneside Council	Jarrow Wharf	41	Wharf	CEMEX	NZ 335 657	Sand and gravel	Active	Not applicable
	Marsden Quarry	42	Quarry	O'Brien Aggregate Marsden	NZ 406 642	Magnesian limestone	Active	31/12/2027
	Port of Tyne - Riverside Quay	43	Wharf	Aggregate Industries	NZ 350 655	Sand and gravel	Active	Not applicable
Sunderland City Council	Eppleton Quarry	44	Quarry	Eppleton Quarry Products	NZ 362 484	Magnesian limestone and Permian sand	Active	15/10/2040
	Port of Sunderland – Greenwells Quay	45	Wharf	Northumbrian Roads Limited	NZ 409 579	Igneous rock	Inactive	Not applicable
Stockton on Tees Borough Council	Able Wharf	46	Wharf	CEMEX	NZ 526 216	Sand and gravel	Inactive	Not applicable

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Notes:

*Status: See Glossary for definitions of 'active' and 'inactive'.*

*Dormant sites are not included in this table or the permitted reserves and landbank figures in this report.*

## Appendix 3: Secondary Aggregates Sites in North East England

Mineral Planning Authority	Site Name	Cross Reference to Figure 4	Operator	Grid Reference	Material	Status	Planning Permission End Date
Northumberland County Council	Lynemouth Power Station, Ashington	1	Lynemouth Power Ltd	NZ 305 899	Ash	Inactive	2027
Stockton-on-Tees Borough Council	Haverton Hill Energy from Waste Plant, Haverton Hill Road, Billingham	2	Suez Recycling and Recovery UK Ltd	NZ 480 224	Ash	Active	Not applicable

## Appendix 4: Recycled Aggregates Sites in North East England

Mineral Planning Authority	Site Name	Cross Reference to Figure 5	Operator	Grid Reference	Material	Status	Planning Permission End Date
Darlington Borough Council	Faverdale Recycling Centre	1	T M Ward (Darlington) Ltd	NZ 278 164	CDEW	Active	Not applicable
	Stan Robinson, Morton Road	2	Tyne Tees Crushing and Screening Ltd	NZ 320 142	CDEW	Active	Not applicable
	Teward Recycling	3	Teward Recycling Ltd	NZ 298 157	CDEW	Active	Not applicable
Durham County Council	Aycliffe Quarry	4	Stonegrave Aggregates Ltd	NZ 284 218	CDEW	Active	Not applicable
	Constantine Farm, Crook	5	W Marley Agricultural Contractors Ltd	NZ 172 335	CDEW	Active	Not applicable
	Dean and Chapter Waste Recycling, Ferryhill	6	Bishop Middleham Plant and Recycling Ltd	NZ 283 329	CDEW	Active	Not applicable
	Esh Construction Recycling	7	Esh Construction Ltd	NZ 302 357	CDEW	Active	Not applicable
	Hulands Quarry	8	Aggregate Industries UK Ltd	NZ 015 138	CDEW	Active	Not applicable
	Old Brickworks, Tanfield	9	Ken Thomas Site Clearance Ltd	NZ 193 547	CDEW	Active	Not applicable
	Lister Scrap Metals	10	Lister Recycling and Waste Management Ltd	NZ 097 500	CDEW	Active	Not applicable

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<b>Mineral Planning Authority</b>	<b>Site Name</b>	<b>Cross Reference to Figure 5</b>	<b>Operator</b>	<b>Grid Reference</b>	<b>Material</b>	<b>Status</b>	<b>Planning Permission End Date</b>
	Shaw Bank Waste Transfer Station	11	F and R Jackson	NZ 060 173	CDEW	Active	Not applicable
	Westline Transfer Station	12	Remondis	NZ 265 548	CDEW	Active	Not applicable
	Wards Transfer Station	13	Ward Bros Enterprise Ltd	NZ 255 397	CDEW	Active	Not applicable
Gateshead Borough Council	Birtley Depot	14	Ibstock Brick Ltd	NZ 265 557	CDEW	Active	Not applicable
	Bells Waste Disposal Ltd	15	Bells Waste Disposal Ltd	NZ 168 643	CDEW	Active	Not applicable
	Longshank Lane	16	North East Concrete	NZ 263 565	CDEW	Active	Not applicable
Hartlepool Borough Council	Niramax Transfer Station	17	Niramax Group Ltd	NZ 511 311	CDEW	Active	Not applicable
	Teesside Recycling Facility	18	Biffa Waste Services Ltd	NZ 521 285	CDEW	Active	Not applicable
	Unit 5 Sandgate Ind Est	19	G N G Waste Management Ltd	NZ 515 312	CDEW	Active	Not applicable
Middlesbrough Borough Council	Middlesbrough Recycling Centre	20	Tarmac Trading Ltd	NZ 513 206	CDEW	Active	Not applicable
	Normanby Wharf	21	J and B Recycling Ltd	NZ 520 208	CDEW	Active	Not applicable
	Richmond Street	22	T P Ship Hire Ltd	NZ 491 211	CDEW	Active	Not applicable

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<b>Mineral Planning Authority</b>	<b>Site Name</b>	<b>Cross Reference to Figure 5</b>	<b>Operator</b>	<b>Grid Reference</b>	<b>Material</b>	<b>Status</b>	<b>Planning Permission End Date</b>
Newcastle City Council	MGL Demolition	23	MGL Demolition Ltd	NZ 180 647	CDEW	Active	Not applicable
	Old Neolith Works	24	Trojan Skips	NZ 169 652	CDEW	Active	Not applicable
North Tyneside Council	Hadrian Yard Central	25	Biffa Waste Services Ltd	NZ 321 663	CDEW	Active	Not applicable
	North Tyneside Transfer Centre	26	Suez Recycling and Recovery NE Ltd	NZ 332 673	CDEW	Active	Not applicable
	Unit 15 The Yard	27	N W H Waste Services Ltd	NZ 353 676	CDEW	Active	Not applicable
Northumberland County Council	Birchwood House, Kitswell Dene, Felton	28	PJR Blewitt Ltd	NU 174 038	CDEW	Active	Not applicable
	Burnt House Farm, Nedderton	29	WPR Farms Ltd	NZ 235 830	CDEW	Active	Not applicable
	Unit 20b Coopies Haugh, Morpeth	30	Clark Homes Ltd	NZ 213 853	CDEW	Active	Not applicable
	3b Dukesway, Prudhoe	31	G S Skip Hire (NE) Ltd	NZ 098 636	CDEW	Active	Not applicable
	10 Ennerdale Road, Blyth	32	S A Waste and Groundworks Ltd	NZ 285 818	CDEW	Active	Not applicable
	Factory Road, Cambois	33	HFF Civil Engineering	NZ 291 849	CDEW	Active	Not applicable
	Howford Quarry	34	Howford Recycling Ltd	NY 918 663	CDEW	Active	Not applicable



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<b>Mineral Planning Authority</b>	<b>Site Name</b>	<b>Cross Reference to Figure 5</b>	<b>Operator</b>	<b>Grid Reference</b>	<b>Material</b>	<b>Status</b>	<b>Planning Permission End Date</b>
	Unit 11 West Sleekburn Industrial Estate, Bedlington	35	James Moscrop	NZ 278 847	CDEW	Active	Not applicable
	Linton Colliery Yard, Linton	36	R Thornton and Co Ltd	NZ 262 914	CDEW	Active	Not applicable
	Lynefield Park – Clark Homes	37	Clark Homes Ltd	NZ 294 897	CDEW	Active	Not applicable
	Lynefield Park – RBB Group	38	RB Blackburn Ltd	NZ 294 897	CDEW	Active	Not applicable
	Old Stone Road	39	East Cramlington Recycled Aggregates Ltd	NZ 286 759	CDEW	Active	Not applicable
	Park View Holdings, Pegswood	40	Sanders Plant and Waste Management	NZ 231 873	CDEW	Active	Not applicable
	Powburn Bridges Depot	41	Northumberland County Council	NU 054 169	CDEW	Active	Not applicable
	Stephenson Way, Bedlington	42	Remondis	NZ 264 836	CDEW	Active	Not applicable
	Thornbrough Quarry, Corbridge	43	W and M Thompson (Quarries) Ltd	NZ 009 635	CDEW	Active	Not applicable
South Tyneside Council	Marsden Quarry Landfill Site	44	O'Brien Aggregate Marden Ltd	NZ 406 641	CDEW	Active	Not applicable
Stockton-on-Tees Borough Council	Cowpen Bewley Landfill Station	45	Highfield Environmental Ltd	NZ 491 245	CDEW	Active	Not applicable
	Land within Riverside Terminal	46	Shire Aggregates Bulk Ltd	NZ 479 214	CDEW	Active	Not applicable

*North East England Aggregates Working Party*

<b>Mineral Planning Authority</b>	<b>Site Name</b>	<b>Cross Reference to Figure 5</b>	<b>Operator</b>	<b>Grid Reference</b>	<b>Material</b>	<b>Status</b>	<b>Planning Permission End Date</b>
	Norton Bottoms	47	Scott Bros Limited	NZ 479 214	CDEW	Active	Not applicable
	Scott Bros Recycling	48	Scott Bros Recycling Ltd	NZ 478 220	CDEW	Active	Not applicable
Sunderland City Council	5b Freezemore Road	49	Grab and Deliver Ltd	NZ 336 527	CDEW	Active	Not applicable
	Hetton Moor Farm Quarry	50	Miss Janette Husband	NZ 370 461	CDEW	Active	Not applicable
	Leechmere Waste Transfer Station	51	Gentoo Group Ltd	NZ 404 541	CDEW	Active	Not applicable
	Monument Park Material Recycling Facility	52	Veolia E S (UK) Ltd	NZ 328 560	CDEW	Active	Not applicable
	Port of Sunderland	53	Northumbrian Roads Ltd	NZ 402 573	CDEW	Active	Not applicable
	Springwell Quarry	54	Thompsons of Prudhoe Ltd	NZ 283 584	CDEW	Active	Not applicable
	Sunderland Recycling Centre	55	Biffa Waste Services Ltd	NZ 320 555	CDEW	Active	Not applicable
	Thompson Waste Ltd	56	Thompson Waste Ltd	NZ 408 562	CDEW	Active	Not applicable
Notes:							
CDEW – Construction, demolition and excavation wastes							

## Appendix 5: Primary Aggregates Sales and Reserves by Resource and End Use

The tables below provide a breakdown of primary aggregates sales and by resource and end use.

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.

### ***Crushed rock sales from quarries in North East England by resource and end use, 2021***

End Use	Carboniferous limestone	Magnesian limestone	Igneous rock	Total crushed rock for aggregate use
Coated roadstone	75,707	0	281,721	357,428
Roadstone to be coated	24,870	98	76,450	101,418
Uncoated roadstone (Type 1 and 2)	15,048	572,860	239,654	827,562
Uncoated roadstone (surface chippings)	0	0	10,239	10,239
Railway ballast	0	0	316	316
Concrete aggregate	298,386	8,543	171,250	478,179
Other screened/graded	307,342	283,221	168,785	759,348
Armour and gabion stone	42,380	10	1,022	43,412
Other constructional use	58,400	273,350	574,832	906,582
Unknown end use	0	1,634,034	833,413	2,467,447
<b>Total sales for aggregate use</b>	<b>822,133</b>	<b>2,772,116</b>	<b>2,357,682</b>	<b>5,951,9313</b>
Notes: Figures in tonnes.				

**Crushed rock reserves at quarries in North East England by resource and end use**

	Carboniferous limestone	Magnesian limestone	Igneous rock	Total crushed rock
Reserves for aggregate uses	20,750,500	83,167,228	72,506,272	176,424,000
Notes: Figures in tonnes.				

**Sand and gravel sales from quarries and wharves in North East England by end use**

End Use	Sales from Quarries (tonnes)	Sales from Wharves (tonnes)
Sand for asphalt	79,416	6,401
Sand for use in mortar	514,938	39,389
Sand for concreting or sharp sand	200,630	470,329
Gravel for asphalt	139	0
Gravel for concrete aggregate	23,663	0
Other screened and graded gravel	41,612	17,240
Other sand and gravel (e.g. for fill)	32,987	25,810
Sand/gravel with unknown end use	203,244	239,500
<b>Total for aggregate use</b>	<b>1,096,539</b>	<b>787,877</b>

## Appendix 6: Crown Estate Landings

The Crown Estate publishes annual statistics relating to the dredging of marine minerals and landings of dredged materials. The table below presents information on the tonnages of marine dredged sand and gravel landed at locations in North East England.

These statistics refer to sand and gravel removed under licence from The Crown Estate Commissioners and relate to royalty returns for the relevant calendar year. Removals from areas not in The Crown Estate ownership are not included in these statistics. The figures relate to landings and differ from the sales reported elsewhere in this report as landings within a given period at a wharf do not necessarily equate to sales for aggregate uses in that same period.

In 2021 the marine dredged sand and gravel delivered to landing locations in North East England was sourced from licenced dredging areas in the Humber dredging region off the coast of Yorkshire and Lincolnshire.

**Table 15** *Marine dredged aggregate landed at wharves in North East England*

	Port of Blyth	River Tees wharves	River Tyne wharves	Total landings in North East England
2010	-	257,062	362,223	619,285
2011	4,046	181,346	247,407	432,799
2012	11,156	99,452	337,173	447,871
2013	27,489	133,711	265,293	426,493
2014	22,946	198,710	292,646	514,302
2015	37,452	245,860	287,018	570,330
2016	29,904	215,142	312,469	557,515
2017	37,406	297,387	296,624	631,417
2018	11,012	281,908	288,992	581,912
2019	18,045	354,643	258,081	630,769
2020	-	291,416	268,655	560,071
2021	17,186	430,688	318,057	765,931

Source: The Crown Estate

Notes:

- Figures in tonnes.
- Figures are for landings and not sales so differ from the figures for sales presented in Table 1 and 2. These statistics refer to sand and gravel removed under licence from The Crown Estate Commissioners and relate to royalty returns for the relevant calendar year. Removals from areas not in The Crown Estate ownership are not included in these statistics.