



Cumbria and the Lake District National Park

Joint Annual Local Aggregates Assessment 2018 (incorporating figures for 2017)

OVERVIEW

1. The purpose of the annual Local Aggregates Assessment (LAA) is for each mineral planning authority to assess the balance between the demand for and supply of aggregates. It should show whether there is a shortage or a surplus of supply. If there is a shortage, it should say how this is being addressed.
2. Whilst lower than the 2016 figures which peaked across most of the aggregate types, generally sales in 2017 have continued the pattern of steady increase since 2013/2014.
3. Current permitted reserves of land-won **sand and gravel** for aggregate use (7.38Mt) are not sufficient to maintain the required land-bank of at least 7 years throughout the Plan period (2015-2030). **A provision based on 2017 sales figures (0.79Mt) gives a landbank of 9.34 years which would run out in 2026.** Reserves would start to fall below the required 7-year supply in 2019. An additional 8.42Mt of sand and gravel reserve is needed to maintain the landbank throughout the Plan period.
4. Current permitted reserves of **all crushed rock** for aggregate use (127.35Mt) are more than sufficient to maintain the required land-bank of at least 10 years throughout the Plan period (2015-2030). **A provision based on 10-year average sales (2.99Mt) gives a landbank of 42.59 years which would run out in 2059.**
5. The 10-year average sales for **sandstone and igneous (excluding high specification aggregates)** gives a landbank of 74.38 years which would run out in early 2091. **A provision based on 2017 sales figures (0.41Mt) maintains a landbank of 70.75 years which should last until 2087.**
6. Looking at reserves for **limestone** alone (also excluding high specification aggregates) the **10 year average sales (2.07Mt) gives a landbank of 39.51 years which would run out in 2056.**
7. Current permitted reserves of **high specification and very high specification aggregates** for use as roadstone is 16.56Mt. This is sufficient to maintain the required land-bank of at least 10 years throughout the Plan period (2015-2030). **Provision based on 10-year average sales (0.54Mt) gives a landbank of 30.67 years which would last until mid-2047.**

8. If sales increase, the need for additional reserve to maintain the 10-year landbank could occur around the start of the next Plan period (after 2030).
9. Ghyll Scaur is the only operating quarry in England to produce the very high specification roadstone. This is a nationally significant resource and therefore demand is likely to increase as a result of planned growth in housing and infrastructure across the UK, not just within Cumbria. If VHSA sales increase significantly additional reserves will be needed to maintain a landbank of 10 years supply of this specific aggregate right to the end of the current Plan period (2030).
10. **Secondary or recycled aggregates** will potentially have an increasingly important role in the provision of aggregate supply. Recorded sales of secondary aggregates in 2017 is 0.31Mt but is likely to be higher in reality. Sales will continue to be monitored as we hope to identify a pattern of increased use of secondary aggregates during the Plan periods.

Managing supply and demand

11. Cumbria has traditionally supplied far more aggregate than is needed for its own use and this trend continues. Planned significant infrastructure requirements within Cumbria are not expected to reach construction stage until 5- 10 years' time so are unlikely to have any short term impact on the landbank position for primary aggregates.
12. As a nationally significant resource, the supply of HSA and VHSA roadstone will be affected by major infrastructure requirements from across the UK and not just within Cumbria. Additional monitoring of this resource is therefore required.
13. Site Allocations have been made in the CMWLP that would provide sufficient reserve to maintain the landbank required for sand and gravel; however there is no guarantee that applications will be forthcoming. There is potential for marine-dredged sand and gravel to make a greater contribution towards the supply and use of secondary/recycled aggregate could also provide an alternative.
14. Site Allocations have been made in the CMWLP for safeguarding the reserve of high specification roadstone but no provision is made for very high specification roadstone. There is an area with potential for VHSA close to Ghyll Scaur but this lies within the Lake District National Park.
15. There are no concerns at this stage regarding supply and demand of crushed rock generally. The Site Allocation made for limestone is not to identify further reserves but to establish whether an alternative area for quarrying is available that would have less impact on the setting of the North Pennines Area of Outstanding Natural Beauty than part of the area currently permitted.
16. The full LAA – which contains all the supporting information - is available on the council website at http://www.cumbria.gov.uk/planningenvironment/policy/minerals_waste/MWLP/LAA.asp and also on the Lake District National Park website: <http://www.lakedistrict.gov.uk/planning/planningpolicies/ldfresearchevidence>

Aggregate sales, reserve & landbank at the end of 2017	Sales Mt	Reserves Mt	10 yr avg sales	3 yr avg sales	LAA provision ¹	Landbank (years) ²	Land bank end date	Reserve & Landbank years remaining at end of 2030	Additional tonnage required to maintain landbank ³
Crushed rock									
Limestone	1.78	81.78	2.07	2.07	2.07	39.51	Mid 2056	54.87 Mt (+26 years)	
Igneous + sandstone exc.V/HSA.	0.41	29.01	0.39	0.42	0.41 ⁴	70.75	Late 2087	23.68Mt (+57 years)	-
V/HSA igneous + sandstone	0.43	16.56	0.54	0.44	0.54	30.67	Mid 2047	9.54 Mt (+17 years)	-
TOTAL igneous + sandstone.	0.83	45.57	0.92	0.86	0.92	49.21	Early 2066	33.61Mt (+36 years)	-
TOTAL ALL crushed rock	2.61	127.35	2.99	2.93	2.99	42.59	Mid 2059	88.48 Mt (+29 years)	-
Sand and gravel									
Land-won sand and Gravel	0.79	7.38	0.62	0.77	0.79 ⁵	9.34	Early 2026	-2.89 Mt (deficit) -3.6 yrs (deficit)	8.42Mt
Marine-dredged	0.008	0.008	-	-	-	-	-		-
TOTAL sand and gravel	0.80	7.39	0.62	0.77		9.34	Early 2026		
Secondary /recycled aggregates									
Secondary/recycled	0.088	-	-						
Slate waste	0.220	-	-						
TOTAL secondary + slate	0.308 (0.31Mt)	-	-	0.314	-	- ⁶	-		-

¹ 10 -year average sales is the starting point but the LAA should also take into account recent trends (3-year average sales) and Other Relevant Local Information when establishing what sales figures to use when calculating landbank provision

² Calculated from LAA provision figure

³ Only required where there is a deficit. Calculated to maintain landbank until end of Plan period (2030) i.e. to last until 2037 or 2040 .This is based on the LAA provision figure.

⁴ Based on 2017 sales figure

⁵ Based on 2017 sales figure

⁶ Landbank not required for secondary aggregates