Cumbria and the Lake District National Park

Joint Annual Local Aggregates Assessment 2019 (incorporating figures for 2018)

EXECUTIVE SUMMARY

1.1 This Local Aggregates Assessment (LAA) is prepared jointly by Cumbria County Council (CCC) and the Lake District National Park Authority (LDNPA). It forms part of the evidence base for monitoring and review of their local plans. The Cumbria Minerals and Waste Local Plan (CMWLP) 2015 -2030 was adopted by CCC in September 2017. The LDNPA has reviewed its local plan (which includes minerals policies) and the Lake District Local Plan (2020-2035) was submitted for Examination in August 2019

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1.2 The 2018 sales, reserves and landbank provision figures for all aggregates in Cumbria (excluding sites within the Yorkshire Dales National Park boundary) are summarised in the table at the end of this chapter. Overall, sales of crushed rock have increased, mainly due to increased sales of high specification roadstone and also limestone. Sales of sand and gravel have reduced.

Sand and Gravel

1.3 Current permitted reserves of land-won sand and gravel for aggregate use (7.26Mt) are not sufficient to maintain the required landbank of at least 7 years throughout the Plan periods (2030 and 2035). The LAA provision will be based on 3-year average sales figures (0.77Mt) giving a landbank of 9.43 years which would run out in 2027. This takes into account recent sales trends (3-year average is 0.77Mt); the sub-regional apportionment of 0.7Mt, and other relevant local information as set out in *Appendix 1.* In order to ensure permitted reserves remain above the “at least” 7 years landbank required by the NPPF, new reserves need to come on stream no later than 2020.

1.4 An additional 7.37Mt of sand and gravel reserve is required to maintain a landbank of a least 7 years throughout the CMWLP period (to 2030) based on 3-year average sales figures. This would increase to 7.71Mt in the event of no further extraction taking place at Brocklewath and Roosecote.

Crushed Rock

1.5 Current permitted reserves of all crushed rock for aggregate use (120.88Mt) are more than sufficient to maintain the required landbank of at least 10 years throughout the Plan periods. The LAA provision will be based on 10-year average sales (2.89Mt) giving a land bank of 41.82 years. This allows for some growth but recognises that sales have fluctuated. In order to ensure permitted reserves for all crushed rock remain above the minimum 10 years required by the NPPF, new reserves will need to come on stream no later than 2049.

1.6 The LAA provision for sandstone and igneous (excluding high specification aggregates) will be based on 3-year average sales (0.4Mt) giving a land bank of 57.08 years. This reflects the fluctuating sales figures over recent years and is higher than the 10 year average sales figure of 0.38Mt. In order to ensure permitted reserves for sandstone and igneous remain above the minimum 10 years required by the NPPF, new reserves will need to come on stream no later than 2065.

1.7 Looking at reserves for limestone alone (also excluding high specification aggregates) the LAA provision will be based on 10-year average sales (2.0Mt) giving a land bank of 40.9 years. This is consistent with last year's figure of 10-year average sales at 2.07Mt. This will be kept under review; if annual sales continue to rise above the 2018 figure of 1.99Mt then a higher provision figure may be more appropriate in future LAAs. In order to ensure permitted reserves for limestone remain above the minimum 10 years required by the NPPF, new reserves will need to come on stream no later than 2048.

High specification aggregates

1.8 Current permitted reserves of high specification (HSA) and very high specification aggregates (VHSA) for use as roadstone is 16.11Mt. This is sufficient to maintain the required minimum 10 year landbank throughout the Plan periods. Provision will be based on 10-year average sales (0.52Mt) giving a landbank of 30.98 years. Whilst this is a further slight drop from 0.57Mt in 2017 and 0.54Mt in 2018 (also based on 10-year average sales) it is still the highest sales figure since 2012. In order to ensure permitted reserves for all high specification aggregates (HSA and VHSA) remain above the landbank of at least 10 years required by the NPPF, new reserves will need to come on stream no later than 2038.

1.9 Ghyll Scaur is the only operating quarry in England to produce the VHSA 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.

1.10 If sales increase significantly, the landbank could potentially start to fall before the end of the Plan periods. An additional 0.33Mt of reserve would be required to maintain a landbank of at least 10 years for VHSA alone throughout the CMWLP period (to 2030) based on 2018 sales and 10-year average sales, and new reserves would need to come on stream by no later than 2029.

Alternative aggregates

1.11 Recorded sales of secondary and recycled aggregates on the 2018 operator returns is 0.4Mt. Sales will continue to be monitored as we hope to identify a pattern of increased use of these alternative aggregates during the Plan periods.

1.12 Trends in sustainable construction methods and the Government's commitment to EU targets for recycling of construction and demolition waste (70% by 2020) mean that recycled aggregates should continue to be readily available and increasingly used in development projects.

Managing supply and demand

1.13 Cumbria has traditionally supplied far more aggregate than is needed for its own use and this trend continues.

1.14 Most planned infrastructure requirements within Cumbria (see Appendix 1 – Other Local Information) are not expected to reach construction stage until 5- 10 years' time. Currently, it is anticipated that the Carlisle Southern Link Road and first phases of St.Cuthbert's Garden Village could commence construction around 2021 but these are still subject to planning permission being granted. These projects will increase demand for aggregates, in particular for the HSA/VHSA roadstone.

1.15 Planned infrastructure requirements outside of Cumbria have also been taken into account when preparing this LAA. Major non-highways projects are not expected to commence until 5-10 years' time so are unlikely to have any short-term impact on the landbank position. However, this will need to be kept under review as the cumulative impact of projects coming on line within the current Plan period could have an impact on the landbank position.

1.16 There are a number of highways schemes, mainly in the North East region, that are scheduled for construction within the next 5 years so there is a strong likelihood that demand will increase for imports of HSA and VHSA roadstone from Cumbria as a result.

1.17 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 reserve is required, particularly as Cumbria contains the only operating quarry in England to produce the VHSA roadstone at Ghyll Scaur. Demand is likely to increase with various national infrastructure projects coming forward such as investment in new roads, airport expansion projects and new nuclear plant facilities. It is likely these projects could reach construction stage in 5 – 10 years' time so supply will be affected within the Plan periods and landbanks will need to be monitored accordingly.

1.18 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 although landing figures are unpredictable and zero landings were recorded in 2018. The Crown Estate has confirmed there is sufficient vessel capacity and licenced material in the region to re-establish supply if market conditions provide sufficient economic demand. The use of secondary and recycled aggregates should also continue to be encouraged as an alternative.

1.19 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 however this lies within the Lake District National Park.

1.20 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.

1.21 As required by the NPPF, in addition to the specific Site Allocations mentioned in this LAA , both the CMWLP and the LDNPA Local Plan have designated Minerals Safeguarding Areas to ensure that known minerals resources - including existing, planned and potential infrastructure and plant - are not sterilised by other non-minerals developments. Railheads and wharves are also safeguarded under separate Local Plan policy.

Table 1: Executive Summary for 2019 LAA

Aggregate landbank 2018 reserve & sales,	Reserves Mt	2018 Sales Mt	Trend[1]	10 yr avg sales	3 yr avg sales	LAA provision[2]	Landbank (years)[3]	Landbank end date	Reserve & Landbank years remaining at end of 2030	Additional tonnage required to maintain landbank[4]
Crushed Rock										
Limestone	81.94	1.99	↑	2.00	1.89	2.00	40.97	Late 2058	57.94 Mt (+28 years)	-
Igneous + sandstone exc.V/HSA.	22.84	0.31	↓	0.38	0.40	0.40[5]	57.08	Early 2075	18.03Mt (+45 years)	-
V/HSA igneous + sandstone	16.11	0.52	↑	0.52	0.47	0.52	30.98	Late 2048	9.87 Mt (+18 years)	-
TOTAL igneous + sandstone.	38.95	0.83	↔	0.90	0.88	0.90	43.27	Early 2061	28.14Mt (+31 years)	-
TOTAL ALL crushed rock	120.88	2.82	↑	2.89	2.77	2.89	41.82	Mid 2059	86.20 Mt (+29 years)	-
Sand and Gravel										
Land-won sand and Gravel	7.26	0.71	↓	0.62	0.77	0.77[6]	9.43	Early 2027	-1.97 Mt (deficit) -2.57 yrs (deficit)	7.37Mt
Marine-[7]dredged	0.0	0.0	↓	-	-	-	-	-		-
TOTAL sand and gravel	7.26	0.71	↓	0.62	0.77	0.77	9.43	Early 2027		
Secondary/Recycled aggregates										
Recycled Aggregate	-	0.176	↑	-						
Secondary aggregate (Slate waste)	-	0.220	↔	-						
TOTAL Recycled and secondary	-	0.396 (0.4Mt)	↑	-	0.384	-	-[8]	-		-

[1] Compared to previous year's sales
[2] 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
[3] Calculated from LAA provision figure
[4] Only required where there is a deficit. Calculated to maintain landbank requirement until end of Plan period (2030) i.e. to last until 2037 or 2040 .This is based on the LAA provision figure.
[5] Based on 3-year average sales
[6] Based on 3-year average sales
[7] Refers to recorded landings at Barrow, not to a permitted reserve
[8] Landbank not required for secondary aggregates