Cheshire West & Chester Council

Local Plan

Local Aggregate Assessment 2019

Visit: cheshirewestandchester.gov.uk

Cheshire West and Chester

Local Aggregate Assessment

Appendices

Executive summary

1 The National Planning Policy Framework (NPPF) identifies the requirement to prepare an annual Local Aggregate Assessment (LAA) to forecast future demand, based on a rolling average of 10 years' sales data and other relevant local information, and an assessment of all supply options (paragraph 207 NPPF 2019.)

2 This report covers the period from 1 January to 31 December 2018.

3 Sand and gravel is the main naturally occurring aggregate mineral within Cheshire West and Chester. The east of the borough also includes an area of silica sand, which is a nationally important industrial mineral. The borough does not contain crushed rock aggregate reserves and therefore needs to import this material.

4 Sales of land won sand and gravel aggregate during 2018 have increased to 0.8 million tonnes. This is an increase of 0.1 million tonnes compared to 2017 and sales are now at a higher level than any other point over the last 10 years. This is reflective of improvements in the economy and levels of construction. Subsequent monitoring will be important in determining if the overall trend of increasing sales continues or flattens off.

5 The level of sand and gravel aggregate permitted reserves has decreased compared to figures recorded in 2016 and 2017, as a result of the high level of sales and lack of additional sites or extensions to existing sites. However, reserve levels still remain higher than those recorded between 2010 and 2014, and exceed the 'at least' seven years as required by paragraph 207 of the NPPF (2019), based on either ten year average sales or the annual apportionment figure.

6 The borough is a key supplier of high quality sand and gravel in the North West - the largest consumers outside of Cheshire during the 2018 period were Greater Manchester, Merseyside, Halton and Warrington. High demand for sand and gravel aggregate is likely to continue due to continued increases in levels of development within the borough and in nearby areas and closure of some quarries in nearby areas. Provision will be reviewed on an annual basis to ensure it remains flexible and proportionate to growth aspirations alongside the reality of delivery and economic conditions.

7 The approach to providing a steady and adequate supply of sand and gravel throughout the plan period is set out in the Local Plan (Part Two). It involves: continued provision of sand and gravel from permitted reserves at existing sites; allocation of a sand and gravel site; identification of a Preferred Area and identification of an Area of Search. This will help to alleviate potential issues beyond 2022 when, if reserves deplete in line with permissions, the borough would only have one operator and one site. This issue will need to be monitored through future LAAs.

Summary of main conclusion from this Local Aggregate Assessment

Table 1

	Performance in 2018	Comparison to previous year (2017)
Land won sand and gravel sales (million tonnes)	0.80mt	↑ 0.13mt
3 year average sales (million tonnes)	0.73mt	↑ 0.07mt
10 year average sales (million tonnes)	0.59mt	↑ 0.01mt
Permitted reserves of sand and gravel (million tonnes)	5.79mt	↓ 0.25mt
Landbank based on annual apportionment figure (years)	7.24 years	↓ 0.31 years
Landbank based on 10 year average sales (years)	9.81 years	↓ 0.60 years
Landbank based on 3 year average sales (years)	8.04 years	↓ 1.11 years
Permitted aggregates sites	4	No change
Active aggregate sites	3	No change

1 Introduction

1.1 Minerals planning authorities should plan for a steady and adequate supply of aggregates. The National Planning Policy Framework (NPPF) (2019) identifies the requirement to prepare an annual Local Aggregate Assessment (LAA) to forecast future demand, based on a rolling average of 10 years' sales data and other relevant local information, and an assessment of all supply options (paragraph 207 NPPF 2019.)

1.2 This Local Aggregate Assessment (LAA) covers the period from 1 January to 31 December 2018 and has been prepared in accordance with the NPPF, Planning Practice Guidance (PPG) and the practice guidance on the production and use of LAAS (May 2017) prepared by the Planning Officers Society and Mineral Products Association.

1.3 The LAA contains the following core elements:

- a forecast of the demand for aggregates based on both the rolling average of 10-years sales data and other relevant local information;
- an analysis of all aggregate supply options as indicated by landbanks, allocations, marine extraction and recycled aggregates;
- an assessment of the balance between demand and supply, and the economic and environmental opportunities and constraints that might influence the situation; and
- a conclusion on whether there is a shortage or a surplus in supply and how any shortage is being addressed.

Information used to produce the LAA

1.4 The key information used to prepare this LAA includes:

- North West Aggregate Working Party (AWP) Annual Monitoring Survey
- Data and information on marine dredged aggregates held by the Crown Estate
- NW AWP Annual Report
- Data on recycled and secondary aggregates
- British Geological Survey data
- Local information, including:
  - Data and correspondence related to planning applications
  - Levels of planned housing and employment development within and affecting the borough

- Details of other key projects within and affecting the borough
- Planned growth and strategies of the Local Enterprise Partnership and nearby authorities

Aggregates in Cheshire West and Chester

1.5 Sand and gravel is the main naturally occurring aggregate mineral within Cheshire West and Chester. The east of the borough also includes an area of silica sand, which is a nationally important industrial material. The borough does not contain crushed rock aggregate reserves and therefore needs to import this material. Further detail relating to the borough's geology is set out in chapter 2 'Local context'.

1.6 The LAA includes an analysis of sales, reserves and landbanks alongside consideration of potential future demand from both within the borough and further afield, and provides an up to date landbank and supply position. The information contained within this report and LAAs from previous years forms part of the evidence base supporting the development and adoption of relevant policies and allocations, including the Local Plan (Part Two) Land Allocations and Detailed Policies.

1.7 A glossary of key terms is provided at Appendix A 'Glossary'.

2 Local context

2.1 Cheshire West and Chester is located in the north west of England in the Cheshire sub-region. The borough is adjoined by the Merseyside authorities of Wirral, Liverpool, Halton and Warrington to the north, Cheshire East to the east, Shropshire to the South and the Welsh authorities of Wrexham and Flintshire to the West. There are major centres both within the borough and nearby, including Chester, Crewe, Liverpool and Manchester.

Population and growth

2.2 Cheshire West and Chester has a resident population of 338,000[i]. This is expected to continue to rise year on year over the period to 2030, accompanied by a corresponding increase in the number of households resulting in the need for further employment opportunities, housing and infrastructure. The population forecasts prepared by Cheshire West and Chester Council in June 2017 indicate that the total population of the borough is forecast to increase to 361,100 by 2030 and to around 366,700 in 2035.

Local geology

2.3 The solid geology of the borough comprises Triassic mudstones and sandstones, apart from a small outcrop of Carboniferous rocks in the north-east of the borough. The solid geology is predominantly overlain by large glacio-fluvial deposits of glacial till, sand and gravel deposited by glacial ice movements over the past two million years. These deposits have provided significant resources of sand and gravel aggregate, the majority of which is found in the east of the borough in the areas surrounding Delamere Forest and in the areas to the west of Northwich. The distribution of these deposits is illustrated in Map 2.1.

2.4 Sand and gravel deposits are generally thick, with some deposits found to reach a depth of 30m. Resources are often overlain by boulder clay and silt deposits, which in places can limit accessibility and workability of the underlying sand and gravel. The Delamere sands, found in the areas immediately to the south west of Northwich, are economically significant deposits of outwash sand and gravel. This area also contains significant deposits of sands which are found in deeper narrower deposits reaching approximate depths of 30m.

2.5 These deposits are protected from incompatible development and therefore unnecessary sterilisation through the Minerals Safeguarding Area as shown on the Policies Map and covered by policy ENV 9 Minerals supply sand safeguarding of the Cheshire West and Chester Local Plan (Part One) Strategic Policies and policy M2 of the Local Plan (Part Two) .

Current extraction

2.6 Historically, the Delamere sands have been the main focus of sand and gravel extraction within the former Cheshire County Council area, with deposits of industrial silica sand being worked in the east of the area. In 2009 approximately 40 per cent of the total supply of sand and gravel in the north

i Source: Office for National Statistics, mid year population estimates 2017 west was sourced from Cheshire, of which approximately 70 per cent was from the Delamere sands area. An indication of current supply patterns is included in chapter 6 'Exports and imports'.

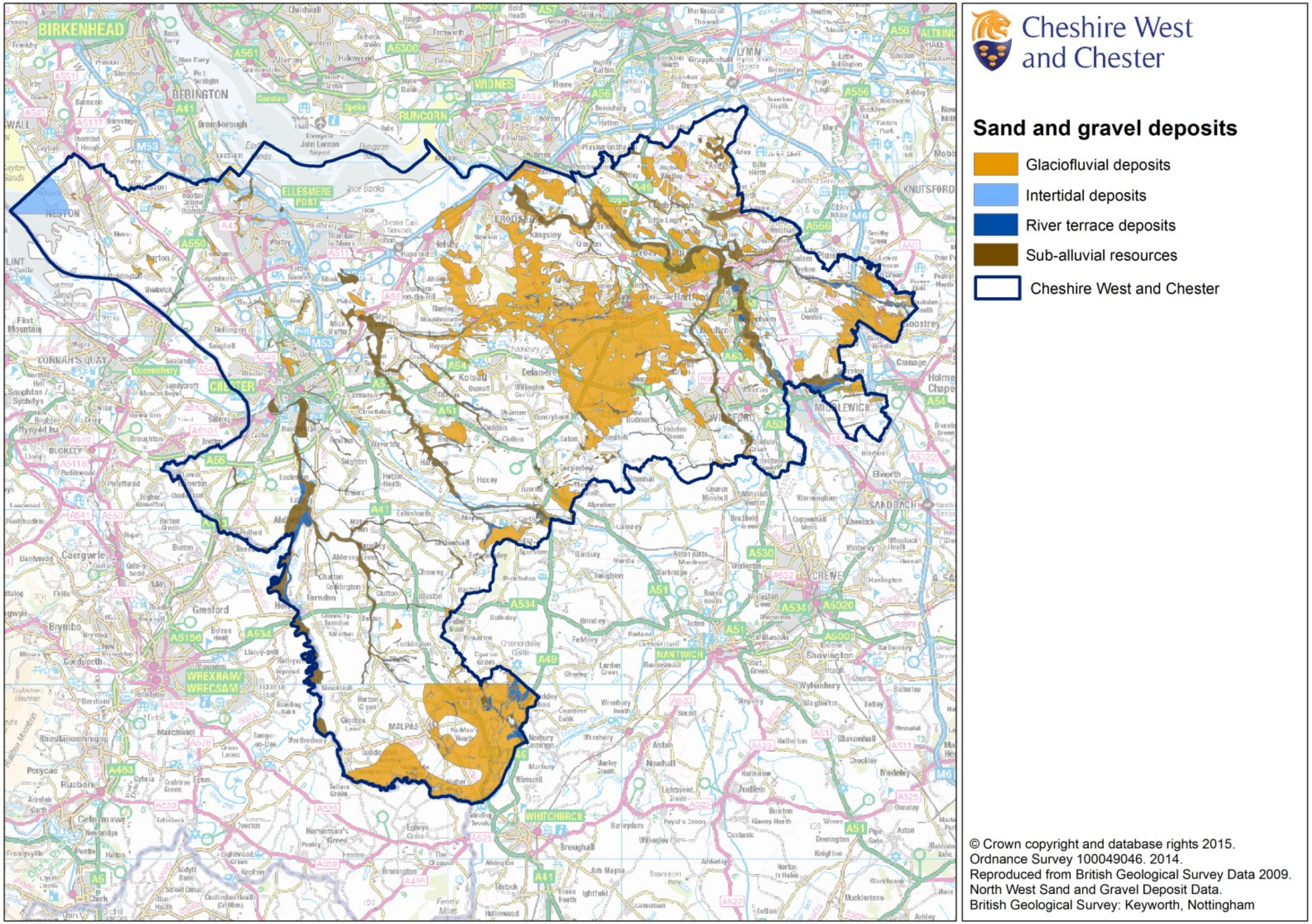
2.7 Current permitted reserves are concentrated in the superficial glacio-fluvial deposits found immediately surrounding Delamere Forest and to the west and south west of Northwich. Material is primarily high quality soft sand used for asphalt and mortar, and coarse sharp sand used in the manufacture of concrete and concreting products as well as general construction fill. These deposits have historically been a significant source of aggregate grade sand and gravel to markets in the north west and beyond. However, the number of active permitted sites within the borough has reduced significantly in recent years.

2.8 The Managed Aggregates Supply System (MASS) seeks to ensure a steady and adequate supply of aggregates in England, taking into account the geographical imbalances in occurrence and need of suitable aggregates resources. It involves national, sub-national and local partners working together - from minerals planning authorities at the local level, Aggregate Working Parties at the sub-national level and a National Aggregate Coordinating Group who monitor the overall provision of aggregate in England. Cheshire West and Chester is a member of the North West AWP. The AWP are consulted on the draft LAA and ratify the final version.

2.9 The NPPF (2019, paragraph 24) also identifies that local planning authorities are under a duty to co-operate with each other, and with other prescribed bodies, on strategic matters that cross administrative boundaries. Cheshire West and Chester Council will co-operate with relevant local authorities and other bodies on strategic minerals issues.

2 Local context

Map 2.1 Sand and gravel formations



3 Local Plan

3.1 The Local Plan (Part One) Strategic Policies was adopted on 29 January 2015 and seeks the delivery of at least 22,000 new homes alongside 365ha of employment land over the period 2010 to 2030. The Local Plan (Part One) took account of and reflects the projected growth in the population set out in chapter 2 'Local context' and the subsequent needs for additional homes, employment and infrastructure. It is therefore essential that the authority seeks to ensure a steady and adequate supply of aggregate minerals to support this projected growth. Further detail relating to future requirements is contained within chapter 12 'Future demand'.

3.2 Policy STRAT 1 Sustainable development sets out the Council's sustainable development principles which provide the basis for other policies within the plan, whilst reflecting the presumption in favour of sustainable development set out in the Framework. The policy seeks to facilitate economic growth and meet the social and environmental needs of the borough whilst ensuring 'the prudent use of our natural finite resources'. Policy STRAT 1 underpins policy ENV 9 Minerals supply and safeguarding which sets out the Council's approach to ensuring a steady and adequate supply of aggregate minerals.

3.3 Policy ENV 9 states that provision will be made for the adequate, steady and sustainable supply of sand and gravel contributing to the sub-national guidelines for aggregate land-won sand and gravel. This will be achieved by maintaining a minimum seven year landbank, in line with the Local Aggregate Assessments. The policy identifies that specific sites and preferred areas will be identified within the Local Plan (Part Two).

3.4 Policy ENV 9 also safeguards the extent of sand and gravel resources in the borough from incompatible development within the Mineral Safeguarding Area as shown on the Policies Map and in Map 4.1.

3.5 The Council submitted the Local Plan (Part Two) Land Allocations and Detailed Policies for examination in March 2018 . An 'Issues and additional call for sites' consultation was carried out in May to June 2014 which was followed by a targeted 'Minerals call for sites' consultation in October to November 2014. Both consultations sought information from industry representatives and landowners relating to potential future areas for minerals extraction in the borough. The sites submitted to these consultations went through an assessment and consultation process and the results fed into preparation of relevant policies within the Local Plan (Part Two). Consultation on the Local Plan (Part Two) Preferred Approach was undertaken between August and September 2016, and comments received fed into the Publication Draft which was consulted upon from 11 December 2017 to 29 January 2018. The Local Plan (Part Two) was submitted for examination on 12 March 2018 and hearing sessions were held in September 2018. The Inspector suggested modifications to the plan, including the addition of 'at least' to the sections relating to future requirements, but apart from this, the modifications did not change the general approach to future minerals provision.

3.6 The Local Plan (Part Two) was adopted on 18 July 2019. Policy M 1 identifies that provision will be made for the extraction of at least 16 million tonnes of land-won sand and gravel over the plan period (0.8 million tonnes per annum). The requirement to provide a minimum seven year supply beyond the plan period would result in an additional requirement of at least 5.6 million tonnes. This is a total requirement of at least 21.6 million tonnes which will be achieved by:

- The continued provision of sand and gravel from the permitted reserves at the following existing sites – Cheshire Sands, Oakmere; Forest Hill, Sandiway; Cobden Farm, Oakmere; and Town Farm, Kingsley.
- The allocation of a site for sand and gravel north of the railway to extend Forest Hill, Sandiway.
- The identification of a Preferred Area at Moss Farm and north of the railway forming an extension to Forest Hill, Sandiway.
- The identification of an Area of Search.

3.7 The Local Plan (Part Two) also allocates a site at Rudheath Lodge, New Platt Lane, Cranage, for silica sand extraction following borehole evidence provided with a planning application relating to the site. The protection of Mineral Safeguarding Areas is covered in more detail by policy M 2 Mineral safeguarding areas in the Local Plan (Part Two).

Planned provision

3.8 As set out above, policy ENV 9 seeks to ensure an adequate, steady and sustainable supply of sand and gravel aggregate in line with the sub-national guidelines and up to date Local Aggregate Assessments. The Local Aggregate Assessment 2018 identified a planned provision of 0.80mt per annum of sand and gravel aggregate, which remains at the annual apportionment figure for the borough as identified in the Local Plan (Part One). This Local Aggregate Assessment reviews the planned provision to ensure it remains proportionate to growth aspirations, supply, demand and the reality of current economic conditions. Chapter 13 'Conclusions and policy considerations' sets out the future planned provision.

4 Aggregate sites

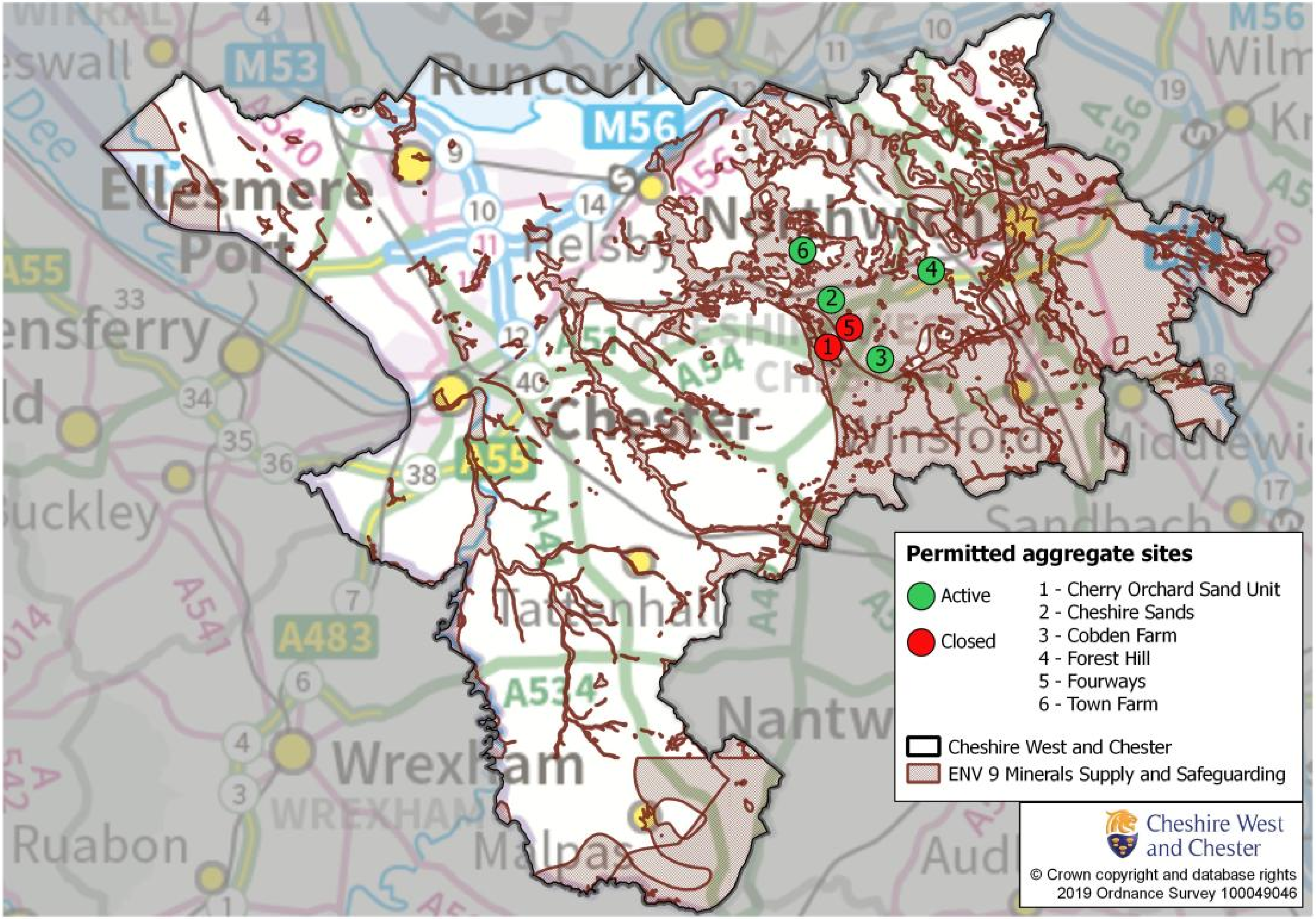
4.1 During 2018 there were four permitted aggregate sites within Cheshire West and Chester, supplying varying qualities of sand to markets across the northwest and beyond. One of these active sites closed during the 2018 monitoring period. Table 2 provides the operational details of the sites.

Table 2 Sand and gravel aggregate sites in Cheshire West and Chester

Site	Operator	2012 status	2013 status	2014 status	2015 status	2016 status	2017 status	2018 status	Material	Site area (ha)	Grid ref
Cherry Orchard Sand Unit	Cherry Orchard Sand Unit Limited	Active	Closed	Closed	Closed	Closed	Closed	Closed	Sand	11ha	SJ 568 680
Cheshire Sands[1]	Lafarge Tarmac	Active	Active	Active	Active	Active	Active	Active	Sand	135ha	SJ 572 699
Cobden Farm	Lafarge Tarmac	Inactive	Inactive	Inactive	Inactive	Inactive	Inactive	Active	Sand	24ha	SJ 587 673
Forest Hill	CEMEX UK	Active	Active	Active	Active	Active	Active	Active	Sand	74ha	SJ 612 714
Fourways	Lafarge Tarmac	Active	Closed	Closed	Closed	Closed	Closed	Closed	Sand	143ha	SJ 577 690
Town Farm[2]	P Casey Enviro Ltd	Active	Active	Active	Inactive	Active	Active	Active	Sand	42ha	SJ 565 735

1. Formerly Station Road (Delamere) and Crown Farm quarries, planning permission granted subject to s106 which was signed 26 March 2015
2. This quarry closed in 2018, but it was active during part of the 2018 monitoring period

Map 4.1 Cheshire West and Chester aggregate sites 2017



Cherry Orchard Sand Unit

Status: Closed

4.2 The Cherry Orchard Sand Unit is located on Abbey Lane, Oakmere and began operation in 1993 supplying aggregate sand to local and wider markets. Extraction of sand at the site ceased unexpectedly in 2013 when reserves depleted ahead of schedule. The landowners have since received planning permission for the seasonal change of use of agricultural land to provide an events venue.

Cheshire Sands

Status: Operational - Extraction permitted to 22 February 2042

4.3 Cheshire Sands is a quarry which links both Crown Farm and Delamere Quarry on Station Road and Chester Road in Oakmere. Delamere Quarry was a partially restored mothballed quarry which initially commenced in 1946, whilst Crown Farm quarry was an active sand quarry which had been active since 1987. Crown Farm gained planning permission for a significant extension in 1992 with an expected operational lifespan of ten years. However, due to fluctuations in the market a significant amount of reserve remained unworked and subsequent extensions of time were granted. In 2011 the application to link and extend the permissions at both Delamere Quarry and Crown Farm was submitted to the Council. The application was subsequently granted planning permission in October 2012, subject to the Section 106 legal agreement which was signed 26 March 2015.

4.4 The permission makes provision for the extraction of approximately nine million tonnes of sand over a 30 year period with an average extraction rate of between 300,000 to 650,000 tonnes per annum. The permission also involves surrender of reserves of 5,000,000 tonnes beneath areas subject to constraints such as ecological issues, increased overburden and beneath the water table. Various conditions of planning permission 11/04200/MIN have since been discharged and an amendment to the permitted restoration scheme has been approved (17/00444/NMA). An application for construction of a concrete batching plant at Cheshire Sands Quarry (18/01210/FUL) was approved in November 2018. This relates to provision of an on-site production unit utilising concrete sand from the quarry, together with the bulk delivery of cement and limestone aggregates to produce concrete.

Cobden Farm

Status: Operational - Extraction permitted to 17 September 2021

4.5 Cobden Farm Quarry is located on Longstone Lane, Commonside north of Little Budworth. Permission for the extraction of sand was granted in 2001 and operations commenced in 2005. The site was mothballed in 2008 due to the drop in demand caused by the recession. An extension of time was granted in 2012 providing a five year extension to the original permission which provided for a working life of six years. An application to extend the lifetime of Cobden Farm Quarry by 5 years until 2021 and to amend the permitted working area in Phase 3 of planning application 15/04063/S73 to enable the extraction of additional mineral reserve was approved at Planning Committee on 6 December 2016, subject to completion of an updated S.106 agreement which was issued on 13th September 2017. The additional permitted working area provides approximately 25,000 tonnes of additional mineral reserves. Various conditions on permission 15/04063/S73 were also discharged in November 2017. Extraction resumed in 2018.

Forest Hill

Status: Operational - Extraction permitted to 11 May 2021

4.6 Forest Hill Quarry is located on Chester Road, Sandiway west of Northwich. The site has been worked for sand since the 1970s with various extensions permitted over time. Mineral extraction under permission 10/04021/MIN was completed in May 2015 and a further permission was granted for a western extension to the quarry (13/03715/MIN) necessitating the continued need to retain the bagging plant infrastructure. Permission 13/03715/MIN makes provision for the extraction of approximately 635,000 tonnes of soft sand for a period of six years from the date of commencement which was 11th May 2015. An extension of time for the bagging plant was permitted until 11th May 2021 or within twelve months of the completion of mineral extraction (15/04076/S73).

Fourways

Status: Closed

4.7 Fourways Quarry is located on Chester Road (A556) east of Chester. The site was worked for sand extraction since the 1970s with various extensions to the permitted working areas over time. Extraction at the quarry ceased in March 2013 with stockpiles remaining during 2014. The site is now closed and an application for the construction of holiday lodges and a new sailing facility at the site (15/01803/FUL) has been approved.

Town Farm

Status: Operational during the 2018 monitoring period, but now closed - Extraction permitted to 30 June 2019

4.8 Town Farm Quarry is located on Mill Lane in Kingsley. The site has been worked for sand and gravel extraction since the early 1980s with various extensions to the permitted working areas over time. Extraction at the quarry ceased in March 2014. A number of applications for variations and discharge of conditions have been submitted relating to the restoration of the site. An application (14/01677/S73) was submitted to vary conditions of permission 11/00816/S73 and allow an additional three years for extraction. This was approved on appeal in February 2016, allowing for extraction to be undertaken until 31 March 2018 and requiring restoration to be complete by 30 December 2019. Extraction re-started in June 2016. Planning permission 17/00575/S73 allows for the winning and working of sand and gravel until 30 June 2019 and has approved amendments to the permitted restoration scheme. Extraction was undertaken during 2017 and 2018, but the site closed in 2018 and the operators have stated that the remaining sand is of poor quality and is not worth extraction.

Other sites

4.9 In addition to the sites listed above, as part of the Minerals Call for Sites, a site at Rudheath Lodge, Cranage was put forward for industrial silica sand. This site is partly within Cheshire West and Chester and partly within Cheshire East. The planning application submitted for this site for silica sand extraction and associated development provided borehole evidence of silica sand provision at the site, in both Cheshire West and Chester and Cheshire East. The site contains 33.5 hectares within Cheshire West and Chester and 41.8 hectares within Cheshire East. The application identifies that the amount of sand to be extracted, processed and sold from the site as a whole is likely to be approximately 3.3 million tonnes, of which 75% will be suitable for sale as high quality silica sand to industrial end uses. The application was subject to a third-party request to call the application in for determination by the Secretary of State for Housing, Communities and Local Government. The Secretary of State decided not to call in the application and the application has now been approved.

4.10 The Rudheath Lodge site will produce both silica sand and aggregate sand. As such, it will be included in future LAA's, once it becomes operational.

Overview of Reserves

4.11 Table 3 provides an overview of when reserves in the borough are expected to deplete over time. This can only be used as an indication and only reflects planning permission expiration. As has been seen in previous years reserves can remain for far longer than predicted and thus require extension of time applications or conversely deplete far faster than expected.

4.12 If reserves deplete in line with permissions the borough will only have one operator and one site by 2022. This could result in the market being unnecessarily constrained and consideration therefore needs to be given to paragraph 207 of the Framework. Paragraph 207 states that authorities should plan for a steady and adequate supply of aggregate minerals by, amongst other things, "ensuring that large landbanks bound up in very few sites do not stifle competition".

4.13 In line with the findings of the previous LAA and the approach to the future supply of aggregate minerals set out in Local Plan (Part One) policy ENV 9, the Council carried out a minerals call for sites consultation. A number of sand sites were submitted to this consultation and initial screening was carried out. The sites were then assessed and the details of the assessment were subject to consultation with interested groups and bodies. The results of the call for sites and the assessment of the sites has fed into the preparation of the Local Plan (Part Two) Land Allocations and Detailed Policies, which proposes to allocate an extension to Forest Hill, identify a Preferred Area and an Area of Search. This will contribute to maintaining a steady and adequate supply of aggregate land-won sand and gravel, and help to increase the number of operators after 2022. The Local Plan (Part Two) also allocates a site at Rudheath Lodge, Cranage, for silica sand extraction and this site will also produce a proportion of aggregate sand.

4.14 The Local Plan (Part Two) was submitted for Examination on 12 March 2018 and hearing sessions were held in September 2018. The Inspector suggested modifications to the plan, including the addition of 'at least' to the sections relating to future requirements, but apart from this, the modifications did not change the general approach to future minerals provision. The Council consulted on the modifications and the Local Plan (Part Two) was adopted on 18 July 2019.

4.15 Chapters 12 'Future demand' and 13 'Conclusions and policy considerations' examines the wider implications of the limited number of sites and future options in more detail.

Table 3 Overview of reserve depletion to 2042

	2018	2019	2020	2021	2022	2023	2024	2025	2026	2027	2028	2029	2030	2031	2032	2033	2034	2035	2036	2037	2038	2039	2040	2041	2042
Cherry Orchard Sand Unit													**Closed**												
Cheshire Sands																									
Cobden Farm																									
Forest Hill																									
Fourways													**Closed**												
Town Farm														**Closed**											

5 Aggregate sales

5.1 Sales for 2009 - 2018 are provided in Table 4 alongside the ten and three year average sales figures. It should be noted that sales figures for 2009 - 2010 are estimates for Cheshire West and Chester, based on monitoring data for the former Cheshire County Council area.

Table 4 Sand and gravel aggregate sales 2008 - 2017 (million tonnes)

	2009	2010	2011	2012	2013	2014	2015	2016	2017	2018	10 year average	3 year average
Cheshire West and Chester(1)	0.55	0.54	0.66	0.56	0.42	0.42	0.60 (2)	0.71	0.67	0.80	0.59	0.73

1. Data for the years 2009-2010 are estimates based on data from the former Cheshire County Council area
2. Data for 2015 is a general representation of the increase experienced during this period, given issues experienced with confidentiality

5.2 Sales of sand and gravel aggregate from within the borough had generally been relatively stable, except for a small rise in 2011 and decline to 0.42mt per annum during 2013 and 2014. Sales have increased since then and are now higher than at any other point over the last 10 years. However, it has not yet reached the levels experienced in 2005-2007 (0.95mt, 00000.86mt and 0.91mt).

5.3 In line with the approach outlined in the NPPF and Planning Practice Guidance, a ten year average sales figure has been calculated for Cheshire West and Chester as 0.59 million tonnes. The ten year average sales take account of the lower levels experienced in the middle of the ten year period and the higher sales over recent years. The ten year average sales figure is slightly higher in this report than in previous years, reflecting the increase in sales in 2018. A three year average sales figure is also included in Table 4 and this is significantly higher than in recent years, due to the high sales experienced in 2018.

5.4 The annual apportionment figure for Cheshire West and Chester remains at 0.80mt as set out in the Local Aggregate Assessment 2014. Aggregate sales were above aggregate apportionment figures for the period 2005 - 2007 but fell sharply in 2008, then stabilised, with a further decline in 2013/14 and have since begun to increase. Aggregate sales have now reached the apportionment figure and are significantly above the ten year average figure, showing the relatively high level of sales experienced in 2018.

5.5 The Mineral Product Association (MPA) report 'Profile of the UK Mineral Products Industry' (2018) identified that growth in mineral products sales in Great Britain ground to a halt in 2017 across all major markets, except for mortar. This reflected muted UK economic growth and elevated uncertainty regarding Brexit negotiations. However, there was continued momentum in house building. The report predicted that demand would remain broadly flat in 2018, before picking up from 2019, as major infrastructure projects come to full capacity. This suggests that the increase in sales of sand and grave aggregate in

Cheshire West and Chester in 2018 relates to growth in house building, as sand is a key component of mortar.

6 Exports and imports

6.1 Cheshire West and Chester is a key supplier of high quality sand and gravel in the North West. Material is exported to neighbouring mineral planning authorities as well as to destinations further afield. In 2009, 40 per cent of sand and gravel aggregate sold in the North West was from sites within Cheshire. Table 5 provides export destination data for the period 1 January to 31 December 2018 for all active sites within the borough alongside export data for 2014, 2016 and 2017 for comparison (data for 2015 is not available due to confidentiality issues).

Table 5 Sales by destination 1 January to 31 December 2018

Destination	Export amount (tonnes) 2014	Export amount (tonnes) 2016	Export amount (tonnes) 2017	Export amount (tonnes) 2018	Percentage of overall 2018 sales
Derbyshire and Peak District	4,062	2,270	4,517	1,480	< 1%
Cheshire West and Chester and Cheshire East	211,292	345,858	274,278	454,462	57%
Greater Manchester, Merseyside, Halton and Warrington	78,633	207,451	186,596	166,893	21%
Lancashire	15,109	10,448	4,601	16,516	2%
Shropshire	118	20	36	2,127	<1%
Staffordshire	26,923	30,426	10,023	587	<1%
South Yorkshire	6,188	-	-	-	0
West Yorkshire	51,821	65,555	112,248	92,541	12%
North East Wales	6,068	8,932	24,948	12,232	2%
North West Wales	3,243	1,167	314	523	<1%
North West (unknown destination in the North West)	13,407	34,645	77,464	41,345	5%
Unknown	-	-	-	7,351	<1%
Total	416,864	706,772	695,025 (1)	796,066 (2)	

1. This includes sand and gravel for non-aggregate use
2. This includes sand and gravel for non-aggregate use

6 Exports and imports

6.2 Table 5 illustrates that in 2018, as in previous years, Cheshire West and Chester and Cheshire East remains the largest consumer of sand and gravel aggregate from Cheshire West and Chester. After this, the Greater Manchester, Merseyside, Halton and Warrington area is still the second largest consumer.

6.3 Compared to 2017, proportions of overall sales by destination remain fairly constant, apart from sales within Cheshire West and Chester and Cheshire East, which have increased significantly, from 40% to 57% and sales to Greater Manchester, Merseyside, Halton and Warrington, which have reduced from 27% to 21%.

Imports

6.4 The most recent import data is for the 2014 monitoring period, gathered as part of the Aggregate Minerals Survey. This data is for Cheshire as a whole, and is not split down for Cheshire West and Chester and Cheshire East. Table 6 below shows quantities of imported primary aggregates in Cheshire in 2014 [(ii)]

Table 6 Imports of primary aggregates in Cheshire in 2014

	Land won Sand and gravel	Marine sand and gravel	Total sand and gravel	Crushed rock	Total primary aggregates
Imports (in million tonnes).	0.135	0.036	0.171	2.059	2.230

6.5 The summary data on consumption of sand and gravel in Cheshire (Cheshire West and Chester and Cheshire East) is provided in Table 7 and the summary data on consumption of crushed rock in provided in Table 8.

Table 7 Consumption of total sand and gravel in Cheshire (land-won and marine-dredged) for aggregate use in 2014 by source, identifying the principal supplying Mineral Planning Authorities

Source Mineral Planning Authority	Consumption of total sand and gravel
Cambridgeshire County Council	<1%
Central Bedfordshire Council	<1%
Nottinghamshire County Council	<1%
Shropshire Council	1-10%

ii Import data taken from Table 10 in 'Collation of the results of the 2014 Aggregate Minerals Survey for England and Wales', British Geological Survey, 2016.

Source Mineral Planning Authority	Consumption of total sand and gravel
Staffordshire Council	1-10%
Cheshire East Council	10-20%
Cheshire West and Chester Council	40-50%
Cumbria County Council	<1%
Lancashire County Council	1-10%
Liverpool City Council	1-10%
Salford City Council	<1%
Doncaster Metropolitan Borough Council	<1%
North Yorkshire County Council	<1%
South Tyneside Metropolitan Borough Council	<1%
Flintshire	<1%
Wrexham	10-20%

6.6 As Cheshire West and Chester does not contain any permitted resources of crushed rock aggregate reserves, all material consumed within the borough will be imported from other mineral planning authorities.

Table 8 Consumption of crushed rock for aggregate use in Cheshire in 2014, identifying the principal supplying Mineral Planning Authorities

Source Mineral Planning Authority	Consumption of crushed rock for aggregate use
Outside England and Wales	<1%
Derbyshire County Council	20-30%
Leicestershire County Council	10-20%
Peak District National Park	1-10%
Shropshire Council	1-10%
Staffordshire Council	<1%

6 Exports and imports

Source Mineral Planning Authority	Consumption of crushed rock for aggregate use
Cumbria County Council	1-10%
North Yorkshire County Council	<1%
Yorkshire Dales National Park	<1%
Durham County Council	<1%
Northumberland County Council	<1%
Northumberland National Park	<1%
Powys	1-10%
Rhondda, Cynon, Taf (Taff)	<1%
Conwy (Aberconwy & Colwyn)	1-10%
Flintshire	30-40%
Gwynedd	<1%

7 Reserves

7.1 Table 9 provides reserve data for the period 2008 - 2018. Data for the period 2007 - 2010 is an estimated for Cheshire West and Chester, as it was collected based on the former County area.

7.2 During 1 January to 31 December 2015 there were only two operational aggregate sites within Cheshire West and Chester which resulted in issues with confidentiality and meant that information relating to sales and reserves could not be published. The figure provided for 2015 is based on the permitted reserves according to the latest planning application, minus potential extraction since date permitted. Further information on this figure is provided in the 2016 LAA report.

Table 9 Sand and gravel aggregate reserves 2007-2017 (million tonnes)

	2008	2009	2010	2011	2012	2013	2014	2015	2016	2017	2018
Cheshire West and Chester	9.41	10.04	4.4	4.3	4.4	4.5	4.7	8.0	6.8	6.6	5.8

7.3 Sand and gravel aggregate reserves as at 31 December 2018 were 5.8 million tonnes. This is a decrease from reserves in 2016 and 2017, as a result of higher levels of sales over the past two monitoring periods and a reassessment of reserves at one site in 2018 which determined that the quality of remaining sand was too poor for extraction and the site has closed as a result.

7.4 The level of reserves during 2018 still remains higher than that between 2010-2014, reflecting the inclusion of figures for the large Cheshire Sands site. This was granted permission in 2012, but could not be included in the reserves figures until 2015, when the Section 106 was signed.

7.5 The large drop in sand and gravel reserves (from 10.04 – 4.4 million tonnes) from 2009 to 2010 is due to the reassessment of reserves at one site in the borough, where recoverable reserves were found to be far lower than as previously reported.

7.6 The reserves figure for 2017 is 6.6 million tonnes, rather than 6.0 million tonnes, as reported in the 2018 AMR. This change is due to an error in the monitoring returns received for the 2017 period, which the Council has only just become aware of.

7.7 Chapter 4 'Aggregate sites' provides details on the expected depletion dates for each aggregate site.

7.8 The NPPF suggests that the required stock of permitted reserves for each silica sand site should be based on the average of the previous 10 years sales. There is a current application for a site at Rudheath Lodge that will provide silica sand and aggregate sand, but this does not yet have planning permission.

7.9 There have not been any silica sand sites or sales within Cheshire West and Chester over the past 10 years so it is not possible to set a requirement figure at this time. The Rudheath Lodge site is partly within Cheshire West and Chester and partly within Cheshire East. The Council will work closely with Cheshire East Council and continue to monitor silica sand provision in future LAAs.

8 Landbank

8.1 Table 10 provides sand and gravel aggregate landbank calculations for the borough as at 31 December 2018 using both the current apportionment figure of 0.80mt per annum and 10 year average sales of 0.58 mt per annum.

Table 10 Aggregate landbanks as at 31 December 2018

Method	Ten year average sales (million tonnes)	Annual apportionment (million tonnes)	Reserves as at 31 December 2018 (million tonnes)	Landbank (years)
Ten year average sales	0.59		5.79	9.81
Annual apportionment figure		0.80	5.79	7.24

8.2 Table 10 shows that the landbank provides more than the 'at least' seven years required by paragraph 207 of the Framework based on either ten year average sales or the annual apportionment figure. The landbank figure for 2018 is slightly lower than in 2017 when the landbank position was 10.41 years based on ten year average sales and 7.55 years based on annual apportionment figure. This could be attributed to higher sales over the last few years and a lack new sites or extensions to existing sites.

8.3 It is recommended that the annual apportionment figure is used to calculate the landbank and potential future requirements for aggregates within the borough. This is because the annual apportionment figure is based on the 'Future of sub-regional apportionment in the Cheshire sub-region' report and the research and consultation undertaken in association with preparation of this document.

8.4 The ten year average sales figure includes lower sales resulting from the impact of the recession and over recent years sales figures have begun to increase. The sales figure for the 2018 period is the same as the annual apportionment figure and sales in the short-term are anticipated to increase as a result of additional development and closure of quarries in other areas. As such, the annual apportionment figure provides a sensible level of provision for the future. Chapter 12 'Future demand' includes more details on predicted future demand, which has informed the decision on the figure to use to calculate the landbank.

8.5 If sales figures continue to increase for a prolonged period, this may need to be reviewed and this will be assessed in future LAAs.

9 Marine wharves and dredging areas

9.1 Manisty Wharf in Ellesmere Port is the only operational marine wharf in Cheshire West and Chester, however, this is not currently used for landing or transporting aggregates. Outside Cheshire West and Chester, material is currently landed at wharves across the North West including Garston and Bramley-Moore Dock in Liverpool.

9.2 There is currently an additional wharf which is expected to become operational during the Local Plan period (2010-2030). The wharf is identified at Ince as part of the permitted Ince Park / Protos scheme. Ince Park has planning consent for a rail connection giving rise to the potential for this wharf to be utilised for minerals landings and onward distribution by sustainable transport modes. As such, it is identified as minerals infrastructure proposed to be safeguarded in the Local Plan (Part Two).

9.3 The active dredging areas in the North West are currently located in the Irish Sea. Material landed from dredging areas across the North West is of a varying quality with minimal gravel content. It is currently difficult to assess the contribution marine aggregate makes to fulfilling demand in the borough and beyond. However, based on the assumptions set out in the 'National and regional guidelines for aggregate provision'[iii] 22 per cent of aggregate sand and gravel produced in the North West should be from marine sources. The Mineral Products Association publication 'Facts at a Glance' (2018) identifies that marine sand and gravel contributed approximately 5.6% to the aggregate supply mix in Great Britain in 2017. Further work to ascertain final destinations and consumption will need to be carried out in future monitoring periods to gain a more thorough understanding of the contributions marine aggregate makes now and its potential for the future.

9.4 According to the most recent information provided by The Crown Estate 2018 Capability and Portfolio document (Capability and Portfolio 2018), 0.32 million tonnes of material was extracted from the marine aggregate licences in the North West region during 2017. This is substantially less than the 1.5 million tonnes (approximate) of material extracted from the region in 2015, but is comparable to the extracted tonnage in 2016 (0.31MT). Material extracted from the region was mainly delivered to North West England (89%). 1.3 million tonnes can be extracted annually from the 3 licences in the North West and there is also an application for a licence that could, if approved, increase the permitted tonnage by 0.5 million tonnes. The current aggregate reserves in the North West region is 12.56MT which is equivalent to a reserve life of 37.49 years at the 10 year annual offtake level.

iii National and regional guidelines for aggregate provision in England 2005 - 2020, Communities and Local Government, June 2009

10 Secondary and recycled aggregates

10.1 Data for construction, demolition and excavation waste recycling is by its nature difficult to compile. The majority of material is reprocessed and utilised at source using mobile plants and therefore does not give rise to monitoring the quantities recycled or their end use. However, the National and regional guidelines for aggregate provision[iv] set out an assumption that approximately 30 per cent of aggregate will be sourced from alternative materials (including recycled aggregate) over the period 2005 - 2020. The latest Mineral Products Industry at a Glance (2018 Edition) produced by The Mineral Products Association states that recycled and secondary materials accounted for 29% of total aggregates supply in Great Britain in 2016.

10.2 A Secondary and Recycled Aggregate Survey has been undertaken as part of the NW AWP Annual Monitoring Survey for the past three monitoring periods. 27 sites which have potential to provide for the treatment, transfer or recycling of CD&E waste stream were surveyed (details of the sites are included in Appendix B 'Recycled aggregate sites'). Only five companies responded and two of these reported dealing with recycled aggregates. One stated that inert waste was taken by Landrecovery to be recycled at their facility (outside Cheshire West and Chester), so figures would be recorded here. The other response related to the household waste recycling centres in Cheshire West and Chester, operated by HW Martin.

10.3 The results of the survey indicate that in 2018 the total recorded sales of secondary and recycled aggregates was 8,467 tonnes. This accounts for around 1% of total aggregate sales in 2018.

10.4 Part of the reason for this low figure is the relatively low number of respondents to the survey and this difficulty retrieving data from operators has presented challenges to understanding the exact level of contribution that secondary and recycled materials make to the supply of minerals. It is also likely to be because the majority of transfer stations are small in scale and operate as bulking stations and whilst some waste streams are segregated, they are not a ready source of recycled aggregates. The volume of waste of a suitable composition delivered to transfer stations is unlikely to be sufficient to justify a fixed plant to separate and screen into individual sizes. The material is more likely to be moved to another site outside of the borough where economies of scale allow crushing and screening plant to be installed.

10.5 Support for the use of secondary and recycled mineral resources is set out in policy ENV 9 of the Local Plan (Part One), and the Council will continue to monitor and seek to obtain further information and evidence on this through future work.

10.6 The Environment Agency's Waste Data Interrogator (WDI) provides information to identify the amount of CD&E waste produced and handled at licenced facilities in the borough. This is likely to represent only a proportion of the recycled aggregates in circulation, and it excludes data which is coded as 'Cheshire' (i.e. not specifically specified to Cheshire West and Chester or Cheshire East).

---

iv National and regional guidelines for aggregate provision in England 2005 - 2020, Communities and Local Government, June 2009

10.7 Data from the latest WDI shows that in 2017, 0.064 million tonnes of inert / construction and demolition waste was received at waste management facilities permitted by the Environment Agency within the borough. This follows the pattern of continued year-on-year decreases since 2012. However, inert / construction and demolition waste removed from the borough has shown an increase from 0.028mt in 2016 to 0.036mt in 2017. This is based on the Substance-Orientated Classification (SOC), which is the main reporting format in the WDI. If the European Waste Catalogue code is used instead, this generates higher figures as there are fewer categories and the classification is less accurate. The Environment Agency has less detailed information on waste removed than waste received.

10.8 Due to the differences in trends between waste handled and waste produced and the robustness of the data, it is difficult to confirm whether this data represents a general increase or decrease in the amount of recycled aggregate available for use in the borough. The data from the WDI only includes material that has been sent to or from waste management facilities permitted by the Environment Agency. As explained above, due to the nature of aggregate recycling, this only forms a relatively small part of the total recycled aggregate generated and used within the borough.

Table 11

Cheshire West and Chester	2012	2013	2014	2015	2016	2017
CD&E waste handled	0.29mt	0.27mt	0.16mt	0.17mt	0.07mt	0.064mt
CD&E waste produced	0.076mt	0.041mt	0.029mt	0.029mt	0.028mt	0.036mt

10.9 The Council is not aware of any major new sources of recycled or secondary material. However, a planning application (18/03199/FUL) for a construction, demolition and excavation waste wash plant and recovery facility was submitted on 15 August 2018 and was approved on 15 May 2019. Once constructed, the plant would have a throughput capacity of up to 650,000 tonnes of construction, demolition and excavation waste and it is anticipated that the plant will produce up to 350,000 tonnes of recycled / secondary aggregates per year. Once operational, this will be recorded in future LAAs.

11 Aggregates infrastructure

11.1 There are several important minerals infrastructure facilities within Cheshire West and Chester, as shown in the table below.

Table 12 Minerals infrastructure

Facility type	Site	Planning status	Operator
Rail sidings	Freight terminal, Ellesmere Port	Operational	Quality Freight Ltd
	Resource Recovery Park, Ince	Planned / non-operational	
	Lostock works rail sidings	Non-operational former minerals sidings	
Wharves	Resource Recovery Park, Ince	Planned / non-operational	
	Manisty wharf (Port Bridgewater), Ellesmere Port	Operational	Quality Freight Ltd
Asphalt plant	Stanlow	Operational	Cemex
	Wincham Lane, Northwich	Operational	Express Asphalt
	The Quarry, Hobb Hill, Malpas	Operational	Quarry Plant Surfacing
Concrete batching plant	Deakin's Road, Winsford	Operational	Hanson
	Sealand Trading Estate, Chester	Operational	Hanson
	Bridges Road, Ellesmere Port	Operational	Hanson
	Liverpool Road, Chester	Operational	Aggregate Industries
	Wharton Industrial Estate, Nat Lane, Winsford	Operational	Cemex
	Tattenhall Road, Tattenhall	Operational	T G Concrete (Tattenhall)
Substitute, recycled and secondary	Middlewich Road, Rudheath, Northwich	Operational	AAA Skip Hire
	Liverpool Road, Chester	Operational	Cheshire Waste Skip Hire

11 Aggregates infrastructure

Facility type	Site	Planning status	Operator
aggregate operators	Indigo Road, Ellesmere Port	Operational	Dig and Shift Ltd

11.2 Manisty Wharf in Ellesmere Port is the only operational marine wharf in Cheshire West and Chester, however, this is not currently used for landing or transporting aggregates. The proposed wharf at Ince Park is expected to become operational during the Local Plan period (2010-2030). The site also has planning consent for a rail connection giving rise to the potential for this wharf to be utilised for minerals landings and onward distribution by sustainable transport modes.

11.3 The minerals infrastructure identified within Table 12 is safeguarded by policy M 8 within the adopted Local Plan (Part Two) Land Allocations and Detailed Policies. This policy safeguards significant infrastructure that supports the supply of minerals in Cheshire West and Chester in line with Policy ENV 9 in the Local Plan (Part One) Strategic Policies. It safeguards this infrastructure against development that would adversely affect operations at an existing mineral site and the use of associated mineral infrastructure by creating incompatible land uses nearby.

11.4 An informal, targeted consultation on safeguarding minerals and minerals infrastructure was undertaken in 2011 and the results of the consultation have informed the identification of mineral infrastructure. The listed sites were reviewed as part of preparation of the Local Plan (Part Two). The secondary and recycled aggregate survey undertaken in 2018 indicated that the household waste recycling centres operated by HW Martin, on behalf of Cheshire West and Chester Council also generate secondary and recycled aggregate sales. As such, they also constitute important minerals infrastructure facilities.

12 Future demand

12.1 Demand forecasting is required in order for the Council to fully assess the capacity, capability and future policy requirements for aggregate minerals within the borough. The Council must take account of factors other than the ten and three year rolling averages and apportionment figures when calculating demand patterns going forward.

12.2 The following chapter assesses the demands from both within the borough itself and the areas to which the borough has exported significant quantities of aggregates.

12.3 Population and economic growth and construction activity forecasts are factors that influence the demand of minerals. Whilst this does not represent any long term monitoring and therefore established export patterns, it will provide the basis upon which future monitoring and therefore demand calculations can be made.

12.1 Demand from within the borough

12.4 Current monitoring of sales by destination is available for 2012 - 2018 (excluding 2015 where this data could not be published due to confidentiality issues). In 2012, 85,338 tonnes of sand and gravel aggregate was consumed within the Cheshire area, amounting to 15 per cent of total sales from the borough. This rose to 51 per cent of overall sales in 2014, and 50 per cent of overall sales in 2016. After a slight dip in 2017, it has risen again in 2018 to 57%. It is possible that a continuing pattern is emerging in relation to consumption within the borough as a percentage of overall sales and it suggests that consumption may be rising in line with housing completions and employment land development over the same period.

12.5 Sales of aggregate from within the borough only provide a limited illustration of demand. Material from elsewhere will be imported in to the borough to meet demand alongside material which is sourced locally. This is most significant for crushed rock due to the absence of any resource within the borough. Other indicators of demand include employment levels, housing completions and economic development completions in the borough. These factors are explored further below.

12.6 The population within Cheshire West and Chester is increasing. According to ONS, it was 333,900 in 2015 and the most recent mid year estimate (2017) is 338,000. The predicted population by 2035 is 366,700. This increase in population will result in increased requirements for houses, employment, shops, services and infrastructure, with an associated impact on demand for aggregates.

Employment

12.7 A key indicator of the health of a local economy is the level of employment and employment levels are strongly linked to consumption of aggregate. Total employment in the borough has been rising since 2007, peaking in 2014 with an employment rate of 75.5 per cent. The employment rate dropped slightly to 73.6 per cent in 2017 but is still slightly above the North West average of 73 per cent. Taken alongside a falling unemployment rate (7.0 per cent in 2012 compared to 3.8 per cent in 2017), this would indicate a continuing trend of a strengthening economy in the borough.

12.8 Alongside the changes in employment, the completion of employment floorspace provides an indication of economic growth in the borough. Table 13 sets out the amount of completed employment floorspace for the period 2009/10 - 2017/18. This has been relatively unstable, with a peak in 2011/12 of 47,740m^2 but they dropped as low as 5,019 m^2 in 2013/14. The total amount of employment floorspace completed had generally been increasing from 2013/14 to 2016/17, but in 2017/18 it has decreased. This information is also reported in the Council's Annual Monitoring Reports (AMR) and therefore this LAA should be read alongside the AMR for the relevant period.

Table 13 Total amount of employment floorspace completed (m^2)

	2009/10	2010/11	2011/12	2012/13	2013/14	2014/15	2015/16	2016/17	2017/18
Amount completed	46,025	10,270	47,740	10,422	5,019	32,842	33,692	36,192	29,049

12.9 The Local Plan (Part One) Strategic Policies makes provision for at least 365ha of employment land which, alongside the growth aspirations of the Cheshire and Warrington LEP which make provision for significant economic growth in the borough.

Housing completions

12.10 Table 14 sets out the number and percentage change in net housing completions over the last ten year period. Housing completions had generally been declining over the period 2005/06 to 2012/13 when completions fell significantly, by 49.6 per cent, from 1,336 to 673. This pattern was in line with sales of sand and gravel aggregate where sales peaked in 2005 at 0.95mt and fell by 55.7 per cent to 0.42mt in 2013.

12.11 Housing completions began to rise during the 2013/14 monitoring period and there has been a sustained yearly increased in net completions since, reaching a 10 year high of 2,542 net completions in 2017/18 (1 April 2017 - 31 March 2018). This pattern is generally mirrored in aggregate sales which have also increased year on year since 2013-14, other than a slight decrease from 2016 to 2017. This would suggest that there is a strong relationship between housing completions and aggregate sales from the borough, with the potential for continuing increase in housing completions to increase demand for aggregates.

12.12 The housing trajectory set out in the Local Plan (Part One) predicted that total completions would rise up to a peak in 2017/18 before gradually declining towards the end of the plan period (2030). However, the predicated completions have been exceeded from 2014/15 onwards. The recent trend in completions has been continuing increases, so this may continue for longer than originally anticipated, taking account of the number of sites with planning permission in the borough and central Government's aims for high levels of future housing delivery.

12.13 There are several large housing schemes within the borough that have either commenced recently or will start shortly, including:

- Former Marley Tile works site - 166 dwellings

- Station Quarter, Winsford - 215 dwellings (part of the larger Neighbourhood Plan allocation)
- Phases 3, 4 and 5 at Ledsham Garden Village, Ellesmere Port - 458 dwellings
- Shipbrook Road, Northwich - 180 dwellings
- Wrexham Road - 786 dwellings (part of a larger scheme for up to 1,400 dwellings)

Table 14 Housing completions in previous years 2006/07 - 2015/16

	07/08	08/09	09/10	10/11	11/12	12/13	13/14	14/15	15/16	16/17	17/18
Completions	707	723	733	564	803	673	970	1,571	1,796	2,017	2,542
% change	-12%	+2%	+1%	-23%	+42%	-16%	+44%	+62%	+14%	+12%	+26%

Major projects

12.14 Major projects alongside employment and housing growth will create further increased demand for aggregate.

- The Local Plan (Part One) Strategic Policies allocates a number of strategic sites which include employment and housing development alongside additional infrastructure requirements. Allocations at Ledsham Road, Ellesmere Port; Wrexham Road, Chester and the Station Quarter, Winsford all include provision for associated infrastructure including schools and community facilities. The Ledsham Road and Station Quarter schemes were under construction in 2018 and the Wrexham Road scheme began in 2019.

- Chester Western Relief Road - allocated in the Chester District Local Plan under Policy TR7 which is retained through the Local Plan (Part One) Strategic Policies pending further feasibility work. Policy T1 in the emerging Cheshire West and Chester Local Plan (Part Two) identifies construction of a Chester Western Relief Road as a priority local road network scheme. Joint working with Flintshire County Council, Highways England and the Welsh Assembly Government is ongoing to identify potential alignments for the 'Chester - Broughton Growth Corridor' which, if implemented, would be a major consumer of aggregate within the borough.

- Policy T1 in the Local Plan (Part Two) also identifies that priority local road network schemes include improvements to the link between Winsford / Middlewich and the M6 Junction 18 and interventions to the north of Northwich, including the Winnington Swing Bridge. In addition there is a proposed scheme for road improvements on the A51 Tarvin-Chester.

12.15 Other regeneration schemes within the borough will also demand provision of primary aggregate.

12.16 The Local Plan (Part Two) identifies several allocations for employment use and housing. Future development of these site allocations would result in requirements for aggregates.

12.17 The Council's Community Infrastructure Levy came into effect on 1 September 2017. The Regulation 123 list includes education, public realm and several transport and highways projects, which could result in requirements for aggregates. The Regulation 123 list currently includes the following projects: Chester Western Relief Road, a new Chester Park and Ride site, highway improvement schemes and improvements to station car parking and accessibility at railway stations across the borough.

12.18 The current proposed route alignment of HS2 (phase 2) passes through eastern parts of the borough. Creation of HS2 and its associated infrastructure, will have significant aggregate requirements.

12.2 Demand from outside of the borough

12.19 Demand from within Cheshire, as outlined in chapter 6 'Exports and imports' accounts for approximately 57 per cent of overall sales. There is no data available to split this down between Cheshire West and Chester and Cheshire East, but it would be expected that the majority of the sales would be within the Borough, but sales to Cheshire East would still be significant.

12.20 The Local Plan Strategy for Cheshire East was adopted in July 2017. This identifies that provision will be made for a minimum of 380 hectares of employment land and a minimum of 36,000 homes between 2010 and 2030. It also includes infrastructure projects such as improvements to Crewe Railway Station, which links to the proposals for HS2. In October 2017 the government announced its support for a new bypass for Middlewich. This employment, housing and infrastructure will all result in additional requirements for sand and gravel aggregate. The 2018 LAA for Cheshire East identified that the sand and gravel landbank was 5.21 years and the shortall would need to be addressed by the extension of existing sites and provision of additional sites. This will be considered through the Minerals and Waste Development Plan Document, which is currently being prepared. However, the current shortfall of aggregates may impact on demand within Cheshire West and Chester.

12.21 The largest consumer of sand and gravel aggregate from Cheshire West and Chester (outside Cheshire) is the Greater Manchester, Merseyside, Halton and Warrington area. The level of material being exported to this area has been around 20-30% over the last few years and in 2018 it was 21%. It should also be noted that 5% of sales in 2018 were exported to an unknown destination within the North West and this may have been within Cheshire, or within the Greater Manchester, Merseyside, Halton and Warrington area.

12.22 As a historically significant consumer of material from Cheshire West and Chester, the Greater Manchester, Merseyside, Halton and Warrington area's growth aspirations should be considered when assessing future demand. The Greater Manchester Local Enterprise Partnership (LEP) covers the authorities of Bolton, Bury, Manchester, Oldham, Rochdale, Salford, Stockport, Tameside, Trafford and Wigan. The Greater Manchester Strategy, prepared by the LEP and the Greater Manchester Combined Authority, includes a target to deliver over 10,000 new houses a year until 2035, alongside significant business growth and infrastructure improvements.

12.23 Greater Manchester is now a devolved city region and is in the process of preparing the Greater Manchester Spatial Framework (GMSF). This will be the overarching framework within which the 10 local planning authorities identify and manage the supply of land for jobs and new homes up to 2035.

Consultation on the draft GMSF ended in March 2019. The GMSF identifies specific growth areas and other development areas, which will provide significant new employment floorspace, new dwellings and large scale infrastructure projects including Port Salford tri-modal inland waterway. There are no specific minerals policies, but the draft GMSF states that the Greater Manchester Joint Minerals Plan was adopted in April 2013 and annual monitoring of minerals extraction and changes in likely future needs will inform whether and when an update of the joint minerals plan is required.

12.24 The Liverpool City Region (LCR) LEP covers the authorities of Halton, Knowsley, Liverpool, Sefton, St Helens and Wirral. The LCR Growth Strategy (2016) sets targets to create over 100,000 new jobs by 2040, alongside additional investments and targets including development of Liverpool2 container terminal, development of the Mersey Waters Enterprise Zone including Liverpool and Wirral Waters schemes and the Northern Powerhouse Rail proposals. The Liverpool Local Plan was submitted for examination in May 2018 and the Examiner has asked a series of questions to be answered by the Council.

12.25 The Cheshire and Warrington LEP covers the authorities of Cheshire East, Cheshire West and Chester and Warrington. By 2040 the LEP aims to create 120,000 jobs and build up to 127,000 new homes as identified in the updated 'Strategic and Economic Plan for Cheshire and Warrington'.

12.26 The Warrington proposed submission version Local Plan identifies objectives to deliver a minimum of 18,900 new homes and provide 362 heceares of employment land between 2017 and 2037. The Warrington Western Link road between the A56 Chester Road in Higher Walton and the A57 Sankey Way in Great Sankey is also anticipated to start within the next two years.

12.27 The Greater Manchester, Merseyside and Warrington Local Aggregate Assessment 2019 (incorporating data from 2017) indicates that there is only one remaining operational sand and gravel quarry in that area and the landbank is well below the requirement of at least 7 years. This may impact on sales within Cheshire West and Chester.

12.28 Cheshire West and Chester is a member of the Constellation Partnership, a partnership between two LEPs and seven Local Authorities which seeks to maximise growth and investment opportunities associated with HS2. The partnership's ambition is to deliver 100,000 new homes and 120,000 new jobs across the Constellation region by 2040. HS2 itself would also have significant aggregate requirements.

12.29 Additional demand for aggregate will be created through the delivery of additional infrastructure permitted by the Planning Inspectorate at the National Infrastructure Directorate. Significant projects that are currently underway or anticipated shortly include: Wrexham Energy Centre; Whitemoss Landfill Western Extension in Skelmersdale; Meaford Energy Centre in Staffordshire; Keuper Gas Storage Project, Northwich; Hydrodec Oil Re-refinery Eastham Wirral; Clocaenog Forest Wind Farm, North Wales; and North Wales Wind Farms Connection.

12.30 All of the above Local Plans, growth strategies and significant projects fall within the geographical area where material from Cheshire West and Chester is consumed. These strategies and projects will continue to place demand on sites from within the borough and therefore form a significant consideration when assessing future policy requirements.

13 Conclusions and policy considerations

13.1 There will be continuing demand for sand and gravel aggregate from within the borough throughout the Plan period and beyond and the level of demand is likely to increase in the future. The ten year and three year average sales indicate that demand had reduced but is now increasing.

13.2 The Local Plan (Part One) Strategic Policies makes provision for the adequate, steady and sustainable supply of sand and gravel. It states that a minimum seven year landbank will be maintained for aggregate land-won sand and gravel. It makes provision for the allocation of specific or preferred minerals sites as either new sites or extensions to existing ones.

Policy considerations

13.3 Policy ENV 9 of the adopted Cheshire West and Chester Local Plan (Part One) Strategic Policies sets out:

> Cheshire West and Chester will make provision for the adequate, steady and sustainable supply of sand, gravel, salt and brine, contributing to the sub-national guidelines for aggregate land-won sand and gravel, whilst ensuring the prudent use of our important natural finite resources.
>
> This will be achieved by:
>
> - Maintaining a minimum seven year landbank for aggregate land-won sand and gravel, making provision for a steady and adequate supply over the Plan period in line with national policy and Local Aggregate Assessments, providing a flexible approach to the location of future minerals development to ensure a diversity of supply for the market.

Local Plan (Part Two) Land Allocations and Detailed Policies

13.4 An 'Issues and additional call for sites' consultation was carried out in May to June 2014 which was followed by a targeted 'Minerals call for sites' consultation in October to November 2014. Both consultations sought information from industry representatives relating to potential future areas for minerals extraction in the borough. The sites submitted to these consultations have been through an assessment process and consultation process, and the results fed into preparation of the minerals policies and allocations within the Local Plan (Part Two) Land Allocations and Policies Preferred Approach.

13.5 Having been through a Preferred Approach consultation and Publication Draft consultation, the Local Plan (Part Two) was submitted in March 2018 for Examination and the hearing sessions closed on 27 September 2018. The Local Plan (Part Two) was adopted on 18 July 2019 and policy M 1 identifies that provision will be made for the extraction of at least 16 million tonnes of land-won sand and gravel over the plan period (0.8 million tonnes per annum). The requirement to provide a minimum seven year supply beyond the plan period would result in an additional requirement of at least 5.6 million tonnes.

This is a total requirement of at least 21.6 million tonnes. It sets out that this will be achieved by: continued extraction of permitted reserves at existing sites; allocation of a new site to extend Forest Hill, Sandiway; identification of a Preferred Area; and identification of an Area of Search.

13.6 The Local Plan (Part Two) also allocates a site at Rudheath Lodge, New Platt Lane, Cranage, for silica sand extraction.

Conclusion

13.7 The current landbank for sand and gravel aggregate is 7.24 years based on the current annual apportionment figure of 0.80mt per annum. If calculated using ten year average sales of 0.58mt per annum the landbank increases to 9.81 years.

13.8 There is likely to be continuing increase in the short-term in the requirement for sand and gravel aggregate due to continued increase in levels of development within the borough and in nearby areas. There are several nearby authorities promoting growth in their areas, but with reducing sand and gravel supplies. As such, this is likely to result in an increase in future sand and gravel demand experienced in the borough in the short to medium term.

13.9 Whilst the borough currently has a landbank of 7.24 years, there may be a need to provide additional sites or extensions to existing sites in order to provide an adequate supply and ensure that at least a 7 year landbank is maintained throughout and at the end of the plan period. This is because beyond 2022 there could be reliance on one remaining site, managed by a single operator. In order to ensure that a steady and adequate supply can be provided throughout the plan period, the Local Plan (Part Two) sets out continued provision of sand and gravel from permitted reserves at existing sites; allocation of a sand and gravel site as an extension to Forest Hill, Sandiway; identification of a Preferred Area; and an Area of Search. The allocation of the site at Rudheath Lodge for silica sand extraction will also provide a proportion of aggregate sand.

13.10 This approach will help to reduce reliance on a small number of sites / operators, making provision for a steady and adequate supply over the Local Plan period in line with national policy.

13.11 In order for the provision of aggregates in the borough to be flexible enough to respond to increased growth, the planned provision will remain at the annual apportionment figure of **0.80mt per annum**. If sales figures continue to increase for a prolonged period, this may need to be reviewed. The sales, reserves, landbank and planned provision will be assessed through future LAAs on an annual basis to ensure provision remains flexible and proportionate to growth aspirations alongside the reality of delivery and economic conditions.

Planned provision

Planned provision will remain at the annual apportionment figure of **0.80mt per annum**.

A Glossary

Aggregate - sand, gravel, crushed rock and other bulk materials used in the construction industry for purposes such as the making of concrete, mortar, asphalt or for roadstone, drainage or bulk filling materials.

Aggregate Working Party (AWP) – a technical working group with members from mineral planning authorities and the minerals industry.

Apportionment – a specific amount of aggregates to be produced annually on a sub-regional basis.

Area of Search - areas where knowledge of mineral resources may be less certain but within which planning permission may be granted, particularly if there is a potential shortfall in supply.

Landbank – a sum of all permitted reserves in active and inactive sites at a specified time and for a given area which provides a monitoring tool of the provision of aggregates in a particular area.

Managed Aggregate Supply System - system used by Government to ensure that there is a steady and adequate supply of aggregate minerals to meet national and local requirements.

Marine aggregates – sand and gravel dredged from the sea.

Mineral resource - concentration of minerals that are of economic interest.

Permitted reserves - sites where planning permission has been granted for development but where extraction has still to take place or is not yet completed.

Preferred Area - areas of known resources where planning permission might reasonably be anticipated by industry.

Primary aggregates – land-won and marine-dredged sand and gravel produced from naturally occurring minerals deposits, extracted specifically for use as aggregate and used for the first time. This also includes crushed rock aggregates, although no consented crushed rock reserves are currently available in Cheshire West and Chester.

Recycled aggregates – produced by recycling construction, demolition, excavation and other wastes.

Reserve – a mineral resource that has a valid planning permission for mineral extraction.

Specific sites - sites where viable resources are known to exist, landowners are supportive of minerals development and the proposal is likely to be acceptable in planning terms.

Secondary aggregates – aggregates obtained as a by-product of other quarrying and mining operations or as a by-product of other industrial processes.

B Recycled aggregate sites

Construction, demolition and excavation waste sites

Site	Facility type	Status	Operator
Ash Skip Hire, CW8 4EB	Transfer station with screening facility	Operational	Ash Skip Hire Limited
AAA Skip Hire Ltd, CW9 7DR	Transfer station	Operational	AAA Skip Hire Ltd
Cheshire Waste Skip Hire, CH1 6PE	Transfer station	Operational	Cheshire Waste Skip Hire Limited
The Recycling Yard, CH65 4AJ	Transfer Station	Operational	Dig And Shift Limited
Canalside Operations Hub, CH65 4EF	Transfer station	Operational	Kier M G Limited
Cheshire Waste Management Centre, CH65 4UU	Hazardous waste transfer station	Operational	Tradebe North West Limited
Davenham Highways Depot, CW9 8JU	Transfer station	Operational	Ringway Infrastructure Services Ltd
Guilden Sutton Highways Depot, CH3 7EX	Transfer station	Operational	Ringway Infrastructure Services
Lostock Sodium Carbonate Manufacturing Site, CW9 7TH	Physical treatment facility	Operational	Tata Chemicals Europe
Manisty Wharf, CH65 1AB	Glass reprocessing facility	Operational	Recresco Limited
Northwich Skip Hire, CW9 7DR	Transfer station	Operational	Northwich Skip Hire
Aggregates Yard, CW9 7GG	Transfer Station + treatment	Operational	UK Aggregates and Plant
Chapterhouse Transfer Station, CH65 4EP	Transfer station	Operational	F C C Waste Services (UK) Ltd
Tattenhall Transfer Station, CH3 9QQ	Transfer station	Operational	Tudor Griffiths Ltd
Winsford Depot, CW7 4EH	Transfer station	Operational	Kier M G Limited

B

Recycled aggregate sites

Site	Facility type	Status	Operator
Lostock Works Fertiliser Production and Metal Recovery Plant, CW9 7XU	Transfer Station	Operational	Eco- Option (U K) Limited
Bridges Road Transfer Station, CH65 4LB	Transfer station	Operational	Alchem Merseyside Limited
Gowy Landfill Site, CH2 4JP	Landfill and composting	Operational	3C Waste Ltd (FCC)
Chester household waste recycling centre, CH1 6QE	Transfer station	Operational	HW Martin
Ellesmere Port household waste recycling centre, CH65 3AW	Transfer station	Operational	HW Martin
Frodsham household waste recycling centre, WA6 6PN	Transfer station	Operational	HW Martin
Neston household waste recycling centre, CH64 3RL	Transfer station	Operational	HW Martin
Northwich household waste recycling centre, CW9 5LN	Transfer station	Operational	HW Martin
Tattenhall houshold waste recycling centre, CH3 9BD	Transfer station	Operational	HW Martin
Winsford household waste recycling centre, CW7 2RB	Transfer station	Operational	HW Martin
Lostock Works, CW9 7NU	Recycled aggregate processing	Not yet operational	Broadthorn Construction Limited
Ince Resource Recovery Park, CH2 4RB	Recycled aggregate processing	Not yet operational	Not yet known

Whilst all of the above sites have the potential to provide recycling and reprocessing of construction, demolition and excavation (CD&E) waste, the Council is only aware of processing and sales of CD&E waste for aggregate use on one of the sites. Some of the sites have screening facilities on-site whilst others only operate mobile facilities where material is recycled and reprocessed at source.

Accessing Cheshire West and Chester Council information and services

Council information is also available in Audio, Braille, Large Print or other formats. If you would like a copy in a different format, in another language or require a BSL interpreter, please email us at **equalities@cheshirewestandchester.gov.uk**

إذا أردت المعلومات بلغة أخرى أو بطريقة أخرى، نرجو أن تطلب ذلك منّا.

যদি আপনি এই ডকুমেন্ট অন্য ভাষায় বা ফরমেটে চান, তাহলে দয়া করে আমাদেরকে বলুন।

Pokud byste požadovali informace v jiném jazyce nebo formátu, kontaktujte nás

Jeżeli chcieliby Państwo uzyskać informacje w innym języku lub w innym formacie, prosimy dać nam znać.

ਜੇ ਇਹ ਜਾਣਕਾਰੀ ਤੁਹਾਨੂੰ ਕਿਸੇ ਹੋਰ ਭਾਸ਼ਾ ਵਿਚ ਜਾਂ ਕਿਸੇ ਹੋਰ ਰੂਪ ਵਿਚ ਚਾਹੀਦੀ, ਤਾਂ ਇਹ ਸਾਥੋਂ ਮੰਗ ਲਓ।

如欲索取以另一語文印製或另一格式製作的資料，請與我們聯絡。

Türkçe bilgi almak istiyorsanız, bize başvurabilirsiniz.

اگر آپ کو معلومات کسی دیگر زبان یا دیگر شکل میں درکار ہوں تو برائے مہربانی ہم سے پوچھئے۔

Tel: 0300 123 8 123 **Textphone**: 18001 01606 867 670
email: equalities@cheshirewestandchester.gov.uk
web: www.cheshirewestandchester.gov.uk