Managing Aggregates Supply in England

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Team Leader – Mineral Resources and Policy
• Undertakes the compilation, provision and analysis of mineral statistics
• The major UK national provider of spatial minerals information.
• Research in areas including metallogenesis, social and land-use impacts of mineral extraction, minerals policy, resource security and geomaterials.
• Key component of the BGS programme of capacity building and institutional strengthening in the developing world.
Outline

• England’s aggregate supply mix
• The Managed Aggregates Supply System
  1) Guidelines for aggregates provision
  2) Aggregates apportionment
  3) Landbank
• Monitoring the supply of aggregates
• The changing national planning policy landscape
Aggregates supply chain in England, 2009

TOTAL AGGREGATES SUPPLY

- Primary from within England: 105.9 Mt (70%)
  - Crushed rock: 59 Mt (56%)
    - Limestone/dolomite: 39.8 Mt (68%)
    - Igneous rock: 15.4 Mt (26%)
  - Sand & gravel: 46.9 Mt (44%)
    - Sandstone: 3.8 Mt (6%)
    - Land-won extraction: 36.6 Mt (78%)
    - Marine landings: 10.3 Mt (22%)
- Secondary Materials: ~4.8 Mt (3%)
- Recycled Materials: ~34.2 Mt (23%)
- Imported from outside England: 6.1 Mt (4%)
  - Crushed rock: 6 Mt (98%)
  - Sand & gravel: 0.1 Mt (2%)
Resources for crushed rock

- England relatively rich in resources
- Unevenly distributed/occur in inconvenient places
- Demographics drive demand and constrain supply
  - Demand concentrated in major urban centres (particularly SE England)
  - Supply constrained by competition for land use (development and designation) + public perception
Crushed rock supply and demand

Inter-regional flows of crushed rock, 2009
Aggregates flows into London and South East England, 2009

Total consumption of primary aggregates: 25 Mt

- Marine sand & gravel: 9 Mt
- Home sales sand & gravel: 5 Mt
- Home sales crushed rock: 1 Mt
- Sand & gravel imports: 2 Mt
- Crushed rock imports: 8 Mt
- Crushed rock from within England: 6 Mt
- Land-won sand & gravel: 2 Mt
- Crushed rock from outside England: 2 Mt

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Managed Aggregates Supply System

• Evolved in the 1970s and current form has existed since 1982.

• Aims to:
  ○ Promote a consistent approach to aggregate issues
  ○ Ensure that mineral planning policies at the local level reflect the need for adequate and steady supply to resource deficient areas

• Revolves around:
  ○ a set of national guidelines
  ○ an apportionment process
  ○ local ‘landbanks’ of reserves
The Guidelines

• Main vehicle for achieving continuity of supply while resolving imbalances of supply and demand

• Utilises demand forecasting to predict requirements for aggregates based on projected investment in construction

• Central in the Managed Aggregate Supply System

• The Government’s finalised Guidelines allocate supply commitments to each English region
## The Guidelines – 2005-2020

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<th>Assumptions</th>
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Aggregates Apportionment

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Landbank policy

- **At least** 7 years for sand and gravel and 10 years for crushed rock
- For aggregates they apply to **supplying areas** (MPAs) and not individual quarries
- Apply to the **industry as a whole** and not individual companies
Capacity to supply

- Not just about reserves and landbanks
- It is about what can actually supply demand
- Not just about the tank, it is about what the **pipeline** feeds to the market
The need for monitoring

- The managed aggregate supply system must be managed if it is to be **effective** and **credible**

- Allocations in development plans for aggregate extraction could be **challenged** on the basis that the Guidelines are out of date and **no longer credible**

- MASS requires **reliable** and **up-to-date** data
Surveys commissioned by Government

- The **Annual Minerals Raised Inquiry** (AMRI) – Compulsory
- **Aggregate Minerals Survey** – Voluntary
- Surveys of **Secondary and Recycled** aggregates - Voluntary
- **AWP Annual Monitoring Reports** - Voluntary
Permitted reserves - England 1993-2009
Permitted reserves sand and gravel - England
Landbanks- Sand and gravel, 2008

- 42% of landbanks were 0 to 7 mpa
- 18% of landbanks were 7 to 10 mpa
- 12% of landbanks were 10 to 15 mpa
- 4% of landbanks were 15+ mpa

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Mineral Products Association
Some Truisms

• An **efficient** planning system is vital to the economy

• The planning system has to **balance** many different **pressures** on the use of land and between conservation and development

• High **quality information** allows more informed debate and should lead to **balanced** judgements
A changing policy landscape: National planning policy - current

• Focus on **top-down** planning via
  • 47 national planning policy documents
    • >1300 pages, 900,000 words
  • 13 specific to minerals
    • ~650 pages, 127,000 words
A changing policy landscape: National planning policy - proposed

• Focus on **bottom-up** planning via
  • 1 National Planning Policy Framework – covers all aspects of land-use planning
    • 52 pages, 19 000 words
  • Minerals specific section
    • 3.5 pages, 1100 words

• Streamline the planning system with a focus on sustainable development.
Summary

• England (and Wales) has had a Managed Aggregate Supply System for over 30 years
• Ensures policies at the local level reflect the need for adequate and steady supply to resource deficient areas
• Main components
  1) Demand forecasts into the future
  2) Apportionment process
  3) Landbank Policy
• Is likely to be under review later in the year