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SOUTH EAST ENGLAND REGIONAL AGGREGATE WORKING PARTY 2007 ANNUAL REPORT

SEERAWP 08/01

1 SEERAWP Terms of Reference and Membership

- 1.1 SEERAWP is a technical group advising government (CLG), the South East England Regional Assembly and Mineral Planning Authorities on aggregates. It is one of nine RAWPs covering England and two in Wales, representatives of which meet as a National Co-ordinating Group (NCG) to consider national issues. The RAWPs and NCG were set up some 30 years ago in response to the need to plan for the supply of aggregates in a way that addressed the geographical imbalances between supply and demand at the national level. The grounds for their establishment remain as pertinent today.
- 1.2 The role of RAWPs is referred to under regional planning in Annex 1 to Minerals Policy Statement 1 (MPS1), and the terms of reference of the RAWPs was reconsidered and updated at the meeting of the NCG held on 27 November 2007. This confirms that RAWPs are to advise on alternatives and marine dredged as well as land won aggregates, and also on imports and exports to and from the region. The revised terms of reference are set out in Appendix A.
- 1.3 SEERAWP membership is drawn from officers of the minerals planning authorities in the region, the minerals industry through the Quarry Products Association and the British Aggregates Association, and government representatives from the Department for Communities and Local Government (CLG) and the Government Office for the South East (GOSE). The Port of London Authority and an officer from the East of England region and the Greater London Authority are also represented. The membership at 31 December 2007 is set out in Appendix B. SEERAWP met three times in the year.
- 1.3 Each year, SEERAWP sets a programme on which to focus, which includes both actions to be undertaken annually, such as the Aggregates Monitoring survey and report, and new initiatives on current issues. The following paragraphs summarise how SEERAWP fared in pursuing the 2007 programme.

2 South East Plan and Minerals Review

Advise the Assembly and its consultants on a sustainability appraisal to establish a revised sub regional apportionment for land-won aggregate, and assist in any inter-regional dialogue arising from the review.

- 2.1 The SE Plan EIP concluded on 30 March 2007. The Panel supported the proposed sub regional apportionment for recycling in Policy M2. This was the only change to the policies for aggregates, and had been recommended to the Assembly by SEERAWP following a project report by consultants on behalf of the Assembly. The Assembly will be responding to GOSE on the Panel report in Spring 2008.
- 2.2 This Minerals Review Steering Group, on which SEERAWP is represented, has focussed on advising and assisting Land Use Consultants (LUC), appointed by the Assembly to recommend a methodology for the sub regional apportionment of land won primary aggregates within the region (ie both sand and gravel, and crushed rock). This stemmed from the EIP Panel report following the partial review of RPG9 for minerals and waste, which recommended a more rounded and more forward looking methodology rather than an apportionment based on past sales, and for a Sustainability Appraisal to be undertaken.
- 2.3 LUC submitted their draft final report to the Assembly in October, together with a Sustainability Appraisal and a Habitats Regulations Assessment. The recommended methodology is based on four criteria – construction demand, past sales, the extent of the un-sterilised resource unconstrained by international designations, and the extent of the un-sterilised resource unconstrained by both international and national designations. The report identified six options A-F with different weighting of these criteria. Options A-D deliberately weighted one criterion heavily in order to provide distinct outputs, whereas options E and F evenly weighted demand and resources.
- 2.4 SEERAWP was consulted on this report at its November meeting. Industry reserved its position on all six options A-F as it considered that it needed more time to consider the options and their potential consequences. It also took the view that the current method of apportionment based on past sales was just as suitable an option. The meeting advised the Assembly to take options C, D and E forward for public consultation. These were selected as providing a suitable spread between options heavily weighted towards demand or resource criteria, C and D respectively, together with a balanced option E. The Regional Assembly is to consider which options it will consult upon at its Regional Planning Committee in January 2008.
- 2.5 Other regions will no doubt need to review their sub regional apportionment in due course, and it was known that Yorkshire and Humberside region was undertaking a very similar exercise, using the same consultants. In order that all regions know of the South East exercise a report was made to NCG for wider dissemination in November.
- 2.6 The Minerals Review Steering Group established in 2006 that hard rock sources and reserves supplying the South East by rail appear sufficient for some 20 years, and there is potential for a long term future supply from marine aggregate resources and reserves, particularly from the East English Channel. The Regional Assembly has appointed consultants to establish whether the aggregate wharves and rail depots in the region are safeguarded and have the capacity to maintain the level of imports, or a significant increase if that should prove necessary. This has been overseen by a Steering Group comprising SEERAWP representatives. The final report has been delayed, and unfortunately may be incomplete due to the poor level of response from the operators.

3 AM2005 and AM2006

Complete and issue AM2005 report, and undertake AM2006 survey such that the draft report is available by the end of 2007.

- 3.1 AM2005 report was issued in February 2007, and AM2006 in November 2007. An executive summary drew attention to the key issues arising from the data. This included
- a continuing fall in sales from land-won sand and gravel to some 34% below the guidelines figure,
 - a continuing decline in reserves as sales outstripped tonnages in new permissions,
 - a heavy dependence on hard rock imports and marine dredged aggregates;
 - no Minerals DPD having yet been adopted, and
 - AM2006 not including data on sales from rail depots, as regrettably, inadequate responses had been made to the survey referred to in 2.6 above.
- 3.2 Both AM2005 and AM2006 have been placed on the CLG and Assembly web sites.

4 Aggregates Minerals 2005 Survey, and Surveys of CE&DW and Secondary Materials

Draw out key features of importance to this region, including inter-regional movement of aggregates and consumption, and whether recycling in the region is increasing.

- 4.1 SEERAWP received a report in June 2007 on the implications for the SE region from the data in the Collation of the Results of the 2005 National Aggregates Minerals Survey, including
- national sales of land-won aggregate confirm that the SE is not alone in experiencing a decline in sales, but the decline in the SE is twice the national rate.
 - the South East has the third largest consumption of any region, but consumption appears to have fallen dramatically by 28% from 2001 to 2005.
 - the South East has experienced the most significant decline in reserves of any region, some 61% since 1995, and has the smallest volume of reserves of any region other than London
 - at 6.8Mt the South East imports more aggregate from other regions than any other, except the North West.
 - unfortunately it was not possible to draw any conclusions from imports to the South East sub regions or their consumption as the survey data included too large a figure to unknown destinations.
- 4.2 The full report has been placed on the CLG and Assembly web sites to be associated with AM2005 and AM2006 regional reports.
- 4.3 The 2005 surveys of CE&DW and Secondary Materials added little to the findings in the 2001 and 2003 surveys. The limited level of returns meant that statistically it was not possible to distinguish significant changes between the surveys.

5 Aggregate Guidelines 4th Monitoring Report

Comment on and advise NCG and the Assembly whether a revision of the Guidelines is warranted

- 5.1 The draft 4th Monitoring Report and the draft revised Guidelines 2005-2020 were considered by the Technical Sub Group (TSG) of NCG in the summer of 2007 and NCG at a meeting in November. The Monitoring Report shows a modest decline in the forecast national demand for aggregate of some 5%. But more significant changes are forecast at the regional level, including for the South East with the 2007 forecast showing a 20% decline from 2003.
- 5.2 The draft revised Guidelines assumes a modest increase in supply to the South East from alternatives (from 118Mt 2001-2016 to 130Mt 2005-2020), a very limited increase in marine sand and gravel, and net imports (ie from outside England) at some 31Mt – a large reduction from the 2003 figure of 85Mt. For land-won aggregate the revised Guidelines propose that the region should supply 195Mt (12.2mtpa) from land won sand and gravel rather than 212Mt (13.25mtpa), and 25Mt (1.6mtpa) from crushed rock rather than 35Mt (2.2mtpa).
- 5.3 SEERAWP received a report on the above for information at its November meeting and will be consulted formally when the revised Guidelines are issued by CLG for consultation in early 2008.

6 Reserves of Land-won Sand and Gravel

Encourage industry to make sufficient applications such that a shortfall of tonnages in planning permissions over sales is reversed.

- 6.1 Following concern expressed by SEERAWP over the decline in sand and gravel reserves in the South East, CLG appointed consultants to investigate whether this decline was reflected nationally, and to also report on the position in respect of rock reserves. The consultants reported that all except one region show a decline in sand and gravel reserves, with four regions experiencing a decline of 25% or more. The consultants have now been asked to try and identify the reasons for the decline, and SEERAWP members have been responding to their requests. A report is expected in Spring 2008.
- 6.2 Meanwhile, although outstanding applications for sand and gravel contained nearly 10Mt of aggregate, in excess of the 8.8Mt sales in 2006, only 251,000 tonnes was permitted, the lowest on record. Applications containing 5Mt of sand and gravel remain undetermined.

7 Marine Aggregates

Respond to the Marine Bill, seeking to ensure that it will assist the planning for a long term adequate and steady supply of marine sand and gravel, particularly from the East English Channel major resource area, to meet national, and particularly South East and London supply needs.

- 7.1 SEERAWP responded to the Marine Bill White paper in June following two meetings at which Defra representatives attended and spoke to the changes taking place, including the licensing regime transferring to the Marine and Fisheries Agency. In its response SEERAWP emphasised how crucial the supply of marine aggregates is to this region, welcomed a number of proposals including marine spatial planning and the establishment of a Marine Management Organisation, and looked forward to the Bill and subsequent consultation on the proposed policy statement and marine plans. The Marine Bill itself is still awaited.

8 Regional Planning Body

8.1 SEERAWP is aware of the changes proposed to regional arrangements following the Review of Sub-National Economic Development and Regeneration announcement that Regional Assemblies will not continue after March 2010. It is understood that the South East England Development Agency will take on the role of Regional Planning Body. How this might affect SEERAWP is not clear.

9 Work Programme for 2008

9.1 It is suggested that the SEERAWP work programme for 2008 focuses on:-

- Regional Planning Body: seek to establish the arrangements for transfer of regional planning responsibilities to SEEDA, and any implications for SEERAWP.
- Aggregate Guidelines 4th Monitoring Report and Revised Guidelines: comment on and advise NCG and the Assembly whether the proposed revision to the Guidelines is appropriate.
- SE Plan Minerals Review: advise the Assembly in the light of the public response to the consultation on options for a methodology to establish a revised sub regional apportionment for land-won aggregate. Advise the Assembly on any necessary steps following the consultants report on the wharves and rail depot survey.
- AM2007: undertake AM2007 survey in accord with the Core Contents for all RAWPs, such that the draft report is available by Autumn 2008.
- Reserves of Land-won Sand & Gravel: comment and advise upon the research commissioned by CLG on understanding why sand and gravel reserves have declined over time, most markedly in this region.
- Marine Aggregates: seek to ensure that the Marine Bill establishes a management regime that delivers an effective framework and efficient regulatory process in order to secure long term supplies.
- CE&DW and Secondary Materials: liaise with SERTAB over monitoring the sub regional provision for recycling set out in the revised SE Plan policy M2.

9 Contractual Arrangements and Costs

9.1 SEERAWP is ultimately responsible to CLG which met the direct cost in servicing SEERAWP for March-December 2007 in accord with the terms of a 4 year contract April 2006-March 2010 between the Regional Assembly and CLG. This is common to all RAWPs in England. It should also be acknowledged that all the main bodies represented on SEERAWP have made a considerable contribution during the year through carrying out studies, responding to surveys, or facilitating or being in attendance at meetings of SEERAWP or the Minerals Review Steering Groups.

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Other Minerals Group

A number of MPA officers on SEERAWP also take part in a Regional Assembly 'Other Minerals Group'. This group includes CBI minerals representatives and advises the Assembly on non aggregate minerals. A note on the activity of OMG in 2007 and its work programme for 2008 is attached as Appendix C.

APPENDIX A

ENGLISH REGIONAL AGGREGATE WORKING PARTIES (RAWPs)

TERMS OF REFERENCE

- 1 To hold at least one RAWP meeting a year, with membership to include representatives from DCLG, the GO, the RPB, MPAs, QPA, BAA and such other representatives as appropriate (eg NFDC, BMAPA).
- 2 To agree either at the first meeting of each year, or early in the year via correspondence, an agenda of RAWP business for that year
- 3 To organise, in conjunction with MPAs, an Annual Monitoring (AM) survey to monitor (subject to confidentiality) the sales and reserves of primary aggregates in the region, imports to it and exports from it by sea or rail (including marine aggregates)
- 4 To support the National Aggregate Minerals surveys, which include all inter-regional movements of aggregate, in years when such surveys are carried out
- 5 To produce, supply to the RPB and publish on the DCLG web an Annual Monitoring report containing core information to inform stakeholders in a consistent manner of the findings from the AM survey
- 6 To give technical advice to DCLG, NCG, the RPB and MPAs on:
 - a) demand for and supply of aggregates in the region (including alternatives, marine aggregates and imports)
 - b) trends in supply in the medium to longer term, including aggregate imports and exports
- 7 To give technical advice to the RPB and MPAs on:
 - a) sub-regional apportionment of land-won aggregates, and, where undertaken,
 - b) sub-regional apportionment of provision for recycling sites for CD&EW
- 8 To liaise with the Regional Technical Advisory Body (RTAB) to co-ordinate monitoring and technical advice on aggregates and waste management, and other RAWPs on the inter-regional movement of aggregates.

APPENDIX B

SEERAWP MEMBERSHIP at 31 December 2007

John Kilford	Chairman	
Chris Waite	Technical Secretary	
David Nkrumah-Boateng	South East England Regional Assembly	
Anthea Hoey	Berkshire Unitary Authorities	
Graham Liddiard	Buckinghamshire CC	
Tony Cook	East Sussex CC & Brighton & Hove Council	
Richard Read	Hampshire CC & Portsmouth & Southampton City Councils	
Bill Murphy	Isle of Wight Council	
Dick Feasey	Kent CC	
Bryan Geake	Medway Council	
Hannah Moores	Milton Keynes Council	
Peter Day	Oxfordshire CC	
David Lamb	Surrey CC	
Mike Elkington	West Sussex CC	
Steve Lamb	QPA	
Nigel Jackson	QPA	
Bob Smith	QPA	
Keith Frost	QPA	
Lillian Harrison	QPA	
Jon Lovett	QPA	
Mark Russell	QPA(BMAPA)	
Ken Hobden	QPA	
Steve Cole	BAA	
James Trimmer	PLA	<i>Adjoining Regions invited to attend:-</i>
Peter Bide	CLG	Roy Leavitt EoE RAWP
Bill MacKenzie	CLG	Richard Linton GLA
Andrew Lipinski	CLG	
John Cheston	GOSE	

APPENDIX C

OTHER MINERALS GROUP

1 Non Aggregate Minerals

- 1.1 The remit for SEERAWP is restricted to aggregates. Accordingly, the Regional Assembly has established an 'Other Minerals Group' (OMG) to cover non aggregate minerals. Four strategically important non aggregate minerals have been identified in the region, brick clay - for bricks and tiles, chalk - for cement, gypsum, and silica sand.
- 1.2 The most widely distributed of these minerals is brick clay quarries and brickworks. With the assistance of the Brick Clay Confederation (BCC) a survey was undertaken in 2005 to identify active brickworks and the level of reserves available to serve them. The results were reported to OMG in January. The report identified that a number of brickworks had a reserve which would last less than 10 years at the current extraction rate. It was not clear whether this was of concern to the operating companies. Accordingly the meeting decided that the Brick Development Association would give its members the opportunity to say where the level of reserves is a concern, and MPAs would be asked to similarly advise. The responses are incomplete, and therefore no OMG meeting was held in June or November following SEERAWP.
- 1.3 At November SEERAWP a report by the Regional Assembly gave guidance to MPAs on the data needed by the Assembly for its annual Regional Monitoring Report, and the format in which data should be supplied. For non aggregate minerals the guide recognised that due to the nature and level of extraction, there may not be a need to conduct detailed annual surveys. However, in the absence of available data, MPAs should conduct a 'base year' survey and then provide an annual update on the level of reserves for each mineral relevant to their area. The Guidance will be reported to OMG at its next meeting.
- 1.4 The objective for 2008 will be that a baseline survey is completed for the four strategically important minerals.

OMG Membership at 31 December 2007:

John Kilford	(acting Chairman)		
David Nkrumah-Boateng	SEERA	Simon Green	Ibstock Brick
Richard Mathews	Bucks CC	Nick Horsley	SAMSA
Tony Cook	E Sussex CC	Chris Hall	BCC
David Lamb	Surrey CC	Bob LeClerc	CBI
Chris Waite	Secretary		