

## Minutes of Yorkshire and Humber AWP Meeting

23 May 2023 1.00pm – 3.00pm

Virtual Meeting via Microsoft Teams

<b>Chair:</b> Vicky Perkin		North Yorkshire Council
<b>Secretariat:</b> Dorottya Faludi		Capita
<b>Attendees:</b> Vicky Perkin (Chair), Malcolm Ratcliff MPA, Joan Jackson (North Yorkshire) Frances Summers (Secretariat), Mark North (MPA), Nick Reeves (Kirklees), Geoff Storey, Heather Louise Lealan (Cemex), Christopher CS Cole (East Riding), Mark Wrigley (The Crown Estate), James Durham (North Lincolnshire), Michael Hurtley (North Lincolnshire), Paula Tweed (Barnsley), Louise White (Leeds), Chris Hanson (Sheffield), Kwame Steadman (Leeds), Oliver Howells (Kirklees), Farzana Tabasum (Leeds), Andy Duncan (Rotherham), Niamh Murphy (DLUHC), Helen McCluskie (Doncaster Council), Louisa White (Leeds City Council), Sukaina Devraj (North Yorkshire Council), Tom Bannister (East Riding), Tiffany Cox (Tarmac), Kris Furness (Breedon Group).		
<b>Apologies:</b> Helen Miller (Leeds), Ian Garrett (Wakefield), Roger Gray (Hull City), Carole Howarth (City of Bradford), Rob Smith (North York Moors National Park Authority).		
Agenda item	Description	Action
1.	<b>Introductions and apologies</b>  Thank you to all who has attended and welcome to a few new faces attending on behalf of others or joining the meeting for the first time.	
2.	<b>Minutes and actions of last meeting</b>  Kris Furness (KF) to provide a note to Dori Faludi (DF) about concerns over the Doncaster & Rotherham LAA to include in the minutes.	

<p>3.</p>	<p><b>Local Aggregate Assessments</b></p> <p><b>1. West Yorkshire</b> Five West Yorkshire authorities are working with consultants BPP to produce an LAA. On track to take the LAA to the Head of Planning in December and looking to ratify afterwards via email.</p> <p><b>2. Doncaster and Rotherham</b> The LAA is out for consultation. Sand and gravel reserves 7.1mt over 8 sites, landbank 10 year average is 16.4 years, 3 year average is 12.4 years. Fixed rate local plan 16.9 years. Limestone reserves 41mt over 6 active sites, landbank 10 year average of 18.5 years, local plan fixed rate 20 years. No new permission, few pending permissions showed in Appendix 1. Updated the aggregate demand document from 2019, it's in Appendix 3 of the LAA. A new estimate of 3.6mt of combined annual aggregate required to meet South Yorkshire's local plan requirement. 90% of reserves and sales is used in South Yorkshire and approx. 10-20% goes to West Yorkshire. Average total production figures for Doncaster for the last 3 years is 3.3mt, dependent on external sources as well as internal production.</p> <p>Breedon raised concerns over the crushed rock figures. Even taking the most ambitious view where the mothballed sites become operational and produce at their highest quoted capacity, without Holme Hall there is a huge gap in supply (1.1-1.4MT / annum) in Doncaster and Rotherham against the 2MT target in the Local Plan. Kris Furness (KF) suggested to work out a solution outside the meeting. Mark North (MN) agreed, the Mineral Products Association (MPA) supports Breedon's comments and objects to the ratification of the LAA in its current form. The group agreed that if the issue is sorted, the LAA will be ratified via email.</p> <p><b>3. North Yorkshire</b> MN and KF didn't receive the North Yorkshire LAA prior to the meeting. Joan Jackson (JJ) received comments on the LAA, however since MN hasn't seen it, the LAA will be ratified via email once he had a look over.</p>	<p>KF to send DF a note on issues about the Doncaster LAA to resolve before ratification and include in the minutes.</p>
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<p>4.</p>	<p><b>YHAWP Monitoring Report 2023</b></p> <p>DF gave an update, there is missing data from Bradford, Kirklees, Wakefield, Calderdale and Yorkshire Dales. DF sent an email to these authorities. Authorities in West Yorkshire currently working with BPP to gather the data, estimates will made for some areas.</p> <p>DF urged authorities to send outstanding data, DF will need to circulate draft report by end of October.</p>	<p>Please chase operators and send returns to DF as soon as possible. Thank you for your efforts.</p>
<p>5.</p>	<p><b>MPA update</b></p> <p><b>Sheffield</b> – Submitted the Plan to Government on Friday, hoping for examination early next year. The plan adopted 2019, completing review early next year</p> <p><b>North Yorkshire</b> – Minerals Plan was adopted last year.</p> <p><b>Bradford</b> – Minerals Plan will be included in the Local Plan. Moving to Reg 19 by the end of the year, submission planned for next year. Won't be much update on minerals policies.</p> <p><b>Doncaster</b> – Local Plan was adopted in 2021. Considering a review next year. South Yorkshire authorities are looking at doing a joint waste plan. No timescale yet.</p> <p><b>Leeds</b> – Doing a Local Plan update, including minerals and waste in it. Also preparing a Climate Emergency Local Plan, done one Reg 19 and will do another. Minerals and waste update, the scoping is done, working on issues and options. MN commented that the MPA hasn't been included in the consultation on the Climate Emergency Local Plan and asked to be included on future consultations.</p> <p><b>Kirklees</b> – The Local Plan was adopted in 2019. Completed an internal review of the Local Plan which determined that an update to the plan will be necessary. It'll need to ratified at Cabinet next Tuesday, then there'll be a vote at Full Council commencing the update.</p>	

	<p><b>Yorkshire Dales National Park</b> – producing a new Local Plan, currently consulting on sites, expecting a draft out next year.</p> <p><b>North Lincolnshire</b> – The Local Plan examination is ongoing, many questions on minerals and waste, working through issues.</p> <p><b>Barnsley</b> – Adopted the Local Plan in 2019 with minerals policies. A review was approved by Full Council, concluded that no update is necessary, policies are still fit for purpose. The next review will be in 2027.</p> <p><b>East Riding</b> - Joint minerals plan with Hull 2019. Local Plan update is under way, hearings starting next months.</p>	
6.	<p><b>Industry Update – MPA</b></p> <p><b>ECONOMY</b> GDP growth remains constrained by high interest rates and a broader economic recovery may be pushed back until at least 2025. The Bank of England held interest rates unchanged in September to halt a run of 14 consecutive increases, yet the Bank expects to sustain high interest rates for an extended period in order to restore price stability, which will keep the brakes on spending and investment.</p> <p><b>CONSTRUCTION</b> Construction output is slowing due to a sharp drop in new private housing output, longstanding weakness in the commercial sector and signs of a slowdown over the past three months in other areas of new work including the industrial sector. Fewer projects are in the pipeline to replace those projects near completion. If there is no substantial rebound in contracts later in 2023/early 2024, it could indicate that a deeper slowdown in construction output may come through in 2024.</p> <p><b>MPA MINERAL PRODUCTS MARKETS FORECAST (2023-25, GB)</b> Prospects of a revival in construction demand for mineral products have been pushed back to 2025, as a result of the weaker outlook for the UK economy, a further slowdown in new housing and roads activity, and heightened concerns over the timing and delivery of other infrastructure projects currently in the pipeline. 2023 forecasts have been revised down across all products monitored, with asphalt volumes now forecast to fall by 8% this year, ready-mixed concrete</p>	M to provide link to Minerals Product Survey with separate section on all regions – See appendix B.

	<p>and primary aggregates to fall by 5%, and mortar to fall by 12% due to its particular exposure to slowing housebuilding activity. Aggregates, ready-mixed concrete and mortar are all expected to drop by a further 1-2% in 2024, with asphalt, by contrast, forecast to see growth of 1%.</p> <p>RTPI minerals conference was successful, looking to do something similar next year.</p> <p>Geoff Storey (GS) added: MPA and BGS carrying out work in the Yorkshire Dales National Park in relation to high PSV. Assessments of national reserves resources. In the current draft LAA awaiting approval, high PSV aggregate is worked in 4 sites in YDNP and that the current level of sales, permitted reserves are sufficient into the mid-term, permitted reserves of crushed rock are sufficient into the long-term. The statement isn't backed by any national assessment. Need to wait for the outcome of the BGS work on the assessment.</p>	
7.	<p><b>Crown Estate update</b></p> <p>Started to run in 2021 a marine aggregate tender for potential extraction sites off-shore, that was subject to a plan level Habitat Regulation Assessment that is still currently ongoing, hoping that would conclude by the end of this year.</p> <p>The Marine Aggregate Review is published on the Crown Estate website.</p>	
8.	<p><b>DLUHC update</b></p> <p><b>2023 Aggregate Minerals Survey</b></p> <ul style="list-style-type: none"> <li>• DLUHC have been making progress with procurement of the contract for the next Aggregate Minerals Survey (AM2023), which will be awarded to the British Geological Survey subject to final checks.</li> <li>• While the survey data collection will start in January 2024, DLUHC are aiming for the contract to commence as soon as possible to allow time for the supplier to prepare relevant materials and plan processes.</li> </ul>	

	<ul style="list-style-type: none"> <li>• There will be a steering group made up of industry, government and AWP representatives who will be able to provide input on the approaches taken at various stages of the contract.</li> <li>• While the survey has typically collected data for England and Wales, AM2023 will also cover Scotland for the first time.</li> </ul> <p><b>Planning Reforms</b></p> <ul style="list-style-type: none"> <li>• Planning reforms are progressing through the Levelling Up and Regeneration Bill (LURB) which has just completed Report Stage in the House of Lords. The government are aiming for the Bill to gain Royal Assent by the end of this parliamentary session on 7 November 2023.</li> <li>• Following Royal Assent of the LURB, there will be a full review of the National Planning Policy Framework (NPPF), including the establishment of National Development Management Policies (NDMPs) and refocusing the remainder of the NPPF on principles for plan making. Consultation on this will take place next year, but DLUHC will be engaging with the planning sector (including minerals) ahead of this.</li> <li>• There is also currently a government consultation on plan-making reforms which closes on 18 October, which we would encourage minerals and waste planning authorities to respond to.</li> </ul> <p><b>Guidelines</b></p> <ul style="list-style-type: none"> <li>• DLUHC previously circulated a discussion paper presenting possible approaches to updating guidelines for aggregate provision which we received comments from AWP members on.</li> <li>• We have since collated and reviewed these comments, discussing with the task and finish group and then the wider NACG at the July meeting.</li> <li>• There was some consensus amongst respondents about some aspects of the process, such as ensuring the guidelines are prepared in a transparent and inclusive way, and are regularly reviewed.</li> </ul>	
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- However, it was decided that further consideration would be needed on whether it was necessary/possible to disaggregate the guidelines down to the local level as whilst industry were in favour of this approach, MPAs were more tentative.
- The next steps on this will be for DLUHC to present the potential approaches to decision makers internally to ensure they are informed about any potential challenges and can offer guidance on strategic considerations that may need to be taken into account.
- In terms of timelines, DLUHC propose the following approach:
  - The 2023 Aggregate Minerals Survey (AM) is due to begin in January 2024 and finish in December of the same year.
  - It is logical that the guidelines will follow on from the results of this to ensure we have an up-to-date baseline (rather than relying on AM2019 survey data and having to re-review once the 2023 data is published), therefore, as the findings of the AM2023 survey are emerging, DLUHC would seek to commission the guidelines project (towards the end of 2024).
  - The current government AWP contracts finish in March 2025, so if through this process, there is a need to revise the scope of the AWPs, this could be done at this stage.

A couple of members of the AWP raised capacity issues affecting LAA production and expressed that refreshed guidelines are needed urgently.

While it is understandable that there may be a desire to do this sooner, the aim of having these discussions now is to ensure we can resolve the difficult issues in advance of commissioning the update. The Task and Finish Group suggested this could include beginning to develop the guidelines based on the existing AM2019 data, and then using the AM2023 data to test the mechanism once available.

9.	<p><b>Any other business</b></p> <p>James Durham (JD) made a point on the plan making reform consultation whether authorities responded separately and listed a few points on minerals topics to be included in the response (duty to assist, mandatory operator returns issues, prospects of national development management policies).</p>	
10.	<p><b>Date of next meeting</b></p> <p>Spring/early summer 2024</p> <p><b>*****Thursday 23<sup>rd</sup> May 2024 at 1300hours*****</b></p>	
Appendices	<p><b>Appendix A: Breedon's note on Doncaster LAA</b></p>	



## Appendix A –

The NPPF sets out that landbanks should be used principally as an indicator of the security of supply. However, the size of the landbank is not the best measure of the ability to maintain a steady and adequate supply of mineral, as it is easily skewed by large reserves bound up in few sites and other constraints may not be factored in. What is really important is the mineral that is likely to be available for production in the assessment / plan period and demonstrable productive capacity.

Taking the operational sites for limestone / crushed rock at table 2 – there are noted to be 6 active sites. However, based on the details I have compiled from planning applications and other public documents:

- Glen Quarry is exhausted. Mineral is supplied from Holme Hall and processed by Marshalls here (I appreciate this is noted);
- Barnsdale Bar is principally within North Yorkshire, who appear to also count the production within their LAA. Are there any remaining reserves within Doncaster?
- Harrycroft is mothballed and has been for some time. I understand there are approx. 2.5MT left and the permission expires in 2031.
- Cadeby is operational but only for dimension stone. While there is potentially a huge reserve (30MT), it is highly constrained and no production can take place in a lot of the further phases without further archaeological or ecological assessment and approval.
- Hazel Lane is active with approx. 2MT remaining (as 1 Jan 2018) and expires in 2034.
- Warmsworth is active predominantly for industrial mineral rather than aggregate use. It should almost be considered separately but I understand it is nearing exhaustion anyway?

Even taking the most ambitious view (per the table below) where the mothballed sites become operational and produce at their highest quoted capacity, **without Holme Hall** there is a huge gap in supply (1.1-1.4MT / annum) in Doncaster and Rotherham against the 2MT target in the Local Plan. If I were to take a more realistic position on Harrycroft, Cadeby, Hazel Lane and Warmsworth I suspect the gap is more likely to be at least 1.75MT. This is further evidenced by the fact that Holme Hall has provided in excess of 90% of the supply for at least the last 5 years where I have the data readily available.