



# **MINERAL PRODUCTS ASSOCIATION**

## **ANNUAL MINERAL PLANNING SURVEY (AMPS) of APPLICATIONS, APPEALS, DECISIONS & DEVELOPMENT PLANS**

**2012**

# CONTENTS

			<b>Page</b>
	<b>EXECUTIVE SUMMARY</b>		1
	<b>INTRODUCTION</b>		2
SECTION ONE	<b>SCALE OF SURVEY</b>		2
SECTION TWO	<b>TRENDS IN DECISIONS</b>	Tables 1-3 Sand & Gravel Applications Submitted, Decisions & Appeals 2012	3
		Tables 4-6 Crushed Rock Applications Submitted, Decisions & Appeals 2012	4
		Table 7 Status of All Applications 2012	5
		Table 8 Numbers of ROMP & Section 73 Applications 2012	5
		Table 9 All Aggregates 10 Yr Running Averages 1998-2012	5
		Chart 1 Running Average of Application Status & Applications Submitted 1998-2012 GB	6
SECTION THREE	<b>TONNAGES ASSOCIATED WITH DECISIONS</b>	Table 10 Tonnage Approved, Refused and Pending 2012	7-8
		Table 11 Tonnage 10 Yr Running Averages 1998-2012	8
		Table 12 Replenishment Rates GB 2003-2012	8
		Chart 2 Running Average Tonnages Approved, Refused & Pending 1998-2012	9
		Chart 3 Running Average Mineral Replenishment Rates 2003-2012	10
SECTION FOUR	<b>DECISION TIMES</b>	Table 13 Duration of Approval Process (No.s of applications) – Sand & Gravel 2012	11
		Table 14 Duration of Approval Process (No.s of applications) -- Crushed Rock 2012	11
		Table 15 Annual Average Duration of Approval Process - Sand & Gravel (Months) 2012	12
		Table 16 Annual Average Duration of Approval Process – Crushed Rock (Months) 2012	12
		Table 17 Running Average of Applications in ‘Time to Process’ Categories 1998-2012	12
		Table 18 Running Average Time from Submission to Approval (Months) 1998-2012	12
		Chart 4 Running Average of Applications in ‘Time to Process’ Categories 1998-2012	13
		Chart 5 Average Times from Submission to Approval for All Aggregates 1998-2012	14
SECTION FIVE	<b>DEVELOPMENT PLAN PROGRESS</b>	Chart 6 Numbers of Core Strategies Adopted by English mpas by Year	15
		Chart 7 Numbers of Other DPDs Adopted by English mpas by Year	16

## **EXECUTIVE SUMMARY**

- The survey recorded 10 new applications for mineral and 13 for Section 73 applications and ROMPS in 2012.
- Section 73 applications and ROMPS now comprise 56% of all applications submitted and pending, and 50% of approvals.
- There is a marked long term reduction in applications submitted with corresponding reductions in applications pending. In the last 15 years average numbers of applications submitted annually have halved to 28 a year.
- Approvals have consistently remained at between 33% and 36% of total applications in the planning system for the last ten years. This means that the planning system appears to have adjusted to dealing with fewer applications by reducing processing capacity and keeping the proportions approved/pending each year broadly similar.
- In 2012 for sand and gravel five times as much material was progressing through the planning system as was being permitted.
- The tonnage of crushed rock approved in 2012 declined from the previous year but was still heavily influenced by one approval of a strategically large quarry extension in the South West. The tonnage refused was zero for a record eighth year in a row.
- Long term trends in average replenishment rates show that sand and gravel replenishment has not been at parity for at least ten years and continues to fall. In 2012 the ten year average stood at 45%.
- Replenishment rates for crushed rock have fallen below parity for the last nine years and in 2012 the ten year average stood at 97%.
- The long term average length of time applications are taking to get through the system from pre-application discussions to approval has risen slowly over the last 15 years, with sand and gravel applications now standing at 32 months to determination, compared to crushed rock at 34 months to determination.
- By end of 2013 only 51% of English mpa Core Strategies will be adopted and only 25% of Other DPDs. In Wales 44% of Local Development Plans are adopted with 80% having reached the Deposit stage (prior to examination).

## **INTRODUCTION**

The Mineral Products Association's Annual Mineral Planning Survey (AMPS) of members' aggregate applications, appeals and decisions for the year 2012 is laid out in this Report.

The Mineral Products Association (MPA) is the trade association for the aggregates, asphalt, cement, concrete, dimension stone, lime, mortar and silica sand industries. With the recent addition of The British Precast Concrete Federation (BPCF) and the British Association of Reinforcement (BAR), it has a growing membership of 450 companies and is the sectoral voice for mineral products. MPA membership is made up of the vast majority of independent SME companies throughout the UK, as well as the 9 major international and global companies. It covers 100% of GB cement production, 90% of aggregates production and 95% of asphalt and ready-mixed concrete production and 70% of precast concrete production. Each year the industry supplies £9 billion of materials and services to the £120 billion construction and other sectors. Industry production represents the largest materials flow in the UK economy and is also one of the largest manufacturing sectors.

MPA members were contacted to take part in this Survey. Returns were received from 82% of those members with aggregates quarrying interests, which was similar to the long term average. This year as last, there were a significant number of Section 73 applications and ROMP Reviews, which have been analysed separately. The main body of the Report therefore deals with mineral bearing applications. Statistics for 1998-2006 relate to the former QPA members only.

## **SECTION ONE - SCALE OF SURVEY**

Out of a total of 92 sites the survey recorded a total of 52 mineral bearing sites about 80% of which were carried forward from previous returns, plus a further 40 sites where applications for Section 73 & ROMP determinations have been made, which continues a trend of increasing numbers of 'administrative' applications which produce no new mineral. Of the mineral bearing sites, 70% were sand and gravel and 30% were crushed rock, whilst extensions outnumbered new sites by 7:1. In total there were eight new sand and gravel sites pending a determination in 2012. Sand and gravel applications handled by Mineral Planning Authorities continue to be larger in number than crushed rock applications in a ratio of about 2:1. Since 1999 there has been a marked drop in the average number of applications being handled for all aggregates with averages of 150 a year before that date and 91 after, a drop of about 40%. 2012 represented a continuing fall in the numbers of mineral bearing applications in the planning system.

## SECTION TWO - TRENDS IN DECISIONS

### SAND AND GRAVEL (MINERAL BEARING)

The number of applications submitted in 2012 showed the marked drop over the previous year and was only 33% of the long term average of 21 applications a year. Approvals also declined to stay around 50% below the long term average. There were two appeals one of which was dismissed with one pending. The number of applications on which a decision was pending dropped to 24; or 42% below the long term average of 41. Two applications were refused and there were no withdrawals. Overall, sand and gravel applications submitted, approved, refused, pending and withdrawn were 44% below the long term trend of 64.

**TABLE 1 - SAND AND GRAVEL APPLICATIONS SUBMITTED (numbers)**

	1998	1999	2000	2001	2002	2003	2004	2005	2006	2007	2008	2009	2010	2011	2012
<b>Submitted (each year)</b>	24	29	40	25	29	32	30	32	24	23	24	17	8	13	7

**TABLE 2 - SAND AND GRAVEL APPLICATION DECISIONS/STATUS (numbers)**

Type of Decision	1998	1999	2000	2001	2002	2003	2004	2005	2006	2007	2008	2009	2010	2011	2012
Approved	39	24	30	28	27	19	20	28	15	28	26	21	11	14	10
Refused	1	3	1	5	7	6	3	4	1	1	0	4	0	1	2
Pending	46	32	49	49	28	39	50	56	52	40	45	37	37	29	24
Withdrawn	2	2	1	2	2	1	2	1	0	1	0	4	2	3	0
<b>Total</b>	<b>88</b>	<b>61</b>	<b>81</b>	<b>84</b>	<b>64</b>	<b>65</b>	<b>75</b>	<b>89</b>	<b>68</b>	<b>70</b>	<b>71</b>	<b>66</b>	<b>50</b>	<b>47</b>	<b>36</b>

**TABLE 3 - SAND AND GRAVEL APPEAL DECISIONS/STATUS (numbers)**

Type of Decision	1998	1999	2000	2001	2002	2003	2004	2005	2006	2007	2008	2009	2010	2011	2012
Allowed	1	3	1	1	0	3	1	2	1	0	2	1	2	0	0
Dismissed	0	0	0	0	2	1	0	0	0	0	1	0	0	0	1
Pending	2	1	0	1	6	4	1	2	1	2	1	0	0	0	1
Withdrawn	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0
<b>Total</b>	<b>3</b>	<b>4</b>	<b>1</b>	<b>2</b>	<b>8</b>	<b>8</b>	<b>4</b>	<b>4</b>	<b>2</b>	<b>2</b>	<b>4</b>	<b>1</b>	<b>2</b>	<b>0</b>	<b>2</b>

## **CRUSHED ROCK (MINERAL BEARING)**

There were three for crushed rock in 2012 which was below the long term average. Approvals for crushed rock were significantly lower than 2011 but returned to near long term average levels, whilst the number of applications on which a decision is pending is close to the long term average of 9.6. There were no refusals or withdrawals for crushed rock applications in 2012 and no appeals for the fifth year running.

**TABLE 4 - CRUSHED ROCK APPLICATIONS SUBMITTED (numbers)**

	1998	1999	2000	2001	2002	2003	2004	2005	2006	2007	2008	2009	2010	2011	2012
<b>Submitted (each year)</b>	10	13	2	4	9	6	0	5	9	4	7	7	1	4	3

**TABLE 5 - CRUSHED ROCK APPLICATION DECISIONS/STATUS (numbers)**

Type of Decision	1998	1999	2000	2001	2002	2003	2004	2005	2006	2007	2008	2009	2010	2011	2012
Approved	19	7	12	10	14	3	3	10	7	8	9	3	4	11	5
Refused	2	0	1	0	2	2	2	0	0	0	0	0	0	0	0
Pending	17	18	16	15	8	8	4	6	16	12	9	11	11	8	11
Withdrawn	1	0	0	0	0	0	0	0	0	0	0	0	0	0	0
<b>Total</b>	<b>39</b>	<b>25</b>	<b>29</b>	<b>25</b>	<b>24</b>	<b>13</b>	<b>9</b>	<b>16</b>	<b>23</b>	<b>20</b>	<b>18</b>	<b>14</b>	<b>15</b>	<b>19</b>	<b>16</b>

**TABLE 6 - CRUSHED ROCK APPEAL DECISIONS/STATUS (numbers)**

Type of Decision	1998	1999	2000	2001	2002	2003	2004	2005	2006	2007	2008	2009	2010	2011	2012
Allowed	0	0	0	0	0	1	1	1	0	0	0	0	0	0	0
Dismissed	0	0	0	0	0	1	0	0	0	1	0	0	0	0	0
Pending	0	0	0	1	1	0	0	0	1	0	0	0	0	0	0
Withdrawn	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0
<b>Total</b>	<b>0</b>	<b>0</b>	<b>0</b>	<b>1</b>	<b>1</b>	<b>2</b>	<b>1</b>	<b>1</b>	<b>1</b>	<b>1</b>	<b>0</b>	<b>0</b>	<b>0</b>	<b>0</b>	<b>0</b>

## ALL AGGREGATES AND ROMP/SECTION 73 APPLICATIONS

The total number of (mineral bearing) applications approved in 2012 was 15, which was 42% below the long term trend of 26. The total number of applications refused or withdrawn was two. The total number of applications on which a decision was pending at the year end was 35 in 2012; this is 31% below the long term average of 51. In 2012 there were 40 ROMP and Section 73 applications recorded in the survey representing a 50% increase over the previous year, including thirteen submitted during the year and 23 which had been pending for an average of 30 months, the longest being submitted in 1997. Seven ROMPs were determined in the year with seven outstanding. Section 73 applications decided in 2012 took an average of 17 months to determine which was a significant increase over the previous year.

**TABLE 7: STATUS OF MINERAL BEARING APPLICATIONS 2012**

Status	Sand & Gravel Tables 1 & 2	Crushed Rock Tables 4 & 5	Total
Submitted	7	3	10
Approved	10	5	15
Refused	2	0	2
Pending	24	11	35
Withdrawn	0	0	0
<b>Total</b>	<b>36</b>	<b>16</b>	<b>52</b>

**TABLE 8: NUMBERS OF ROMP & SECTION 73 APPLICATIONS 2012**

Status	ROMP	Section 73	Total
Submitted	2	11	13
Approved	7	8	15
Refused	0	0	0
Pending	7	16	23
Withdrawn	0	2	2
<b>Total</b>	<b>14</b>	<b>26</b>	<b>40</b>

**TABLE 9: ALL AGGREGATES 10 YR RUNNING AVERAGES 1998-2012 (NB. Numbers may not sum due to rounding) [see Chart 1]**

Type of Decision	1998	1999	2000	2001	2002	2003	2004	2005	2006	2007	2008	2009	2010	2011	2012
Approved	45	43	42	42	41	39	37	37	34	35	33	32	29	28	26
Refused	5	5	5	5	5	4	4	4	4	4	4	4	4	3	3
Pending	86	83	80	75	67	62	60	59	60	56	55	55	53	51	51
Withdrawn	6	5	4	4	3	2	2	2	2	2	1	1	2	2	2
<b>Total</b>	<b>142</b>	<b>137</b>	<b>131</b>	<b>125</b>	<b>117</b>	<b>108</b>	<b>103</b>	<b>102</b>	<b>100</b>	<b>97</b>	<b>93</b>	<b>92</b>	<b>88</b>	<b>84</b>	<b>80</b>
Submitted	53	52	47	41	39	39	37	37	36	35	35	33	30	29	28

**Chart 1: 10 yr Running Average of Application Status & Applications Submitted 1998-2012  
Great Britain (All Aggregates)**

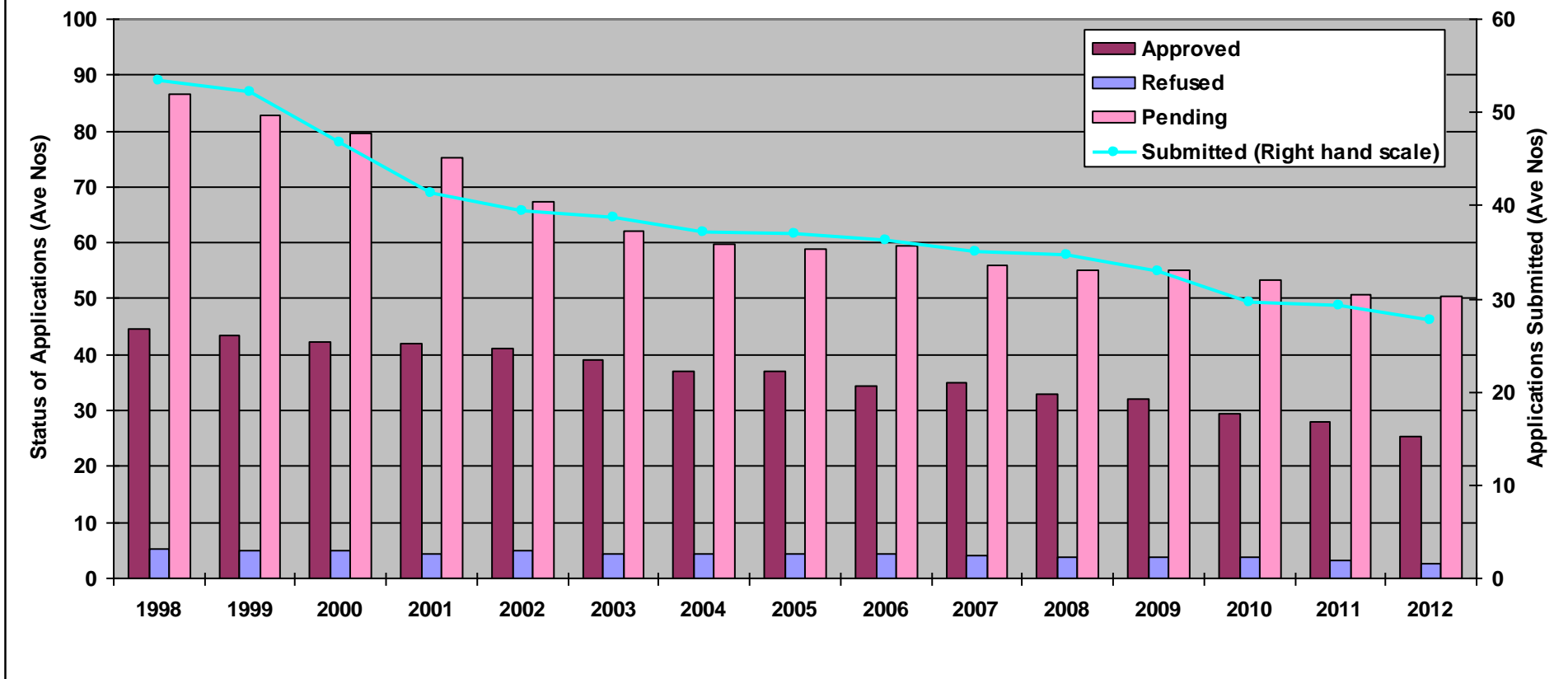


Table 9 and Chart 1 shows the long term (10 year) running average of application status for each year for all aggregates. This is compared to the long term running average in numbers of applications submitted. The marked long term reduction in applications submitted continued as the effects of the recession persist and are reflected in the continued reductions in pending applications. Approvals have also declined in proportion to the total number of applications in the survey and have consistently remained at between 33% and 36% of total applications for the last ten years. This means that the planning system appears to have adjusted to dealing with fewer applications by reducing processing capacity and keeping the proportions approved/pending each year broadly similar.



## **SECTION THREE - TONNAGES ASSOCIATED WITH DECISIONS**

In 2012 the tonnage of sand and gravel approved was the same as the previous year, but remained only 73% of the long term approval rate of 24 Mt. The sand and gravel tonnage on which a decision was pending fell slightly to 86 Mt which is above the long term average. Nearly five times as much material is currently progressing through the planning system than is being permitted in the current year.

Although the tonnage of crushed rock approved in 2012 fell by half from the peak of 2011 the 128 Mt permitted was heavily influenced by one approval of a strategically large extension in the South West. The tonnage refused was zero for a record eighth year in a row. The tonnage pending increased to 80 Mt as several large extensions are still progressing through the system.

The total tonnage approved consequently fell to nearer the long term average which apart from a rise in 2007 has remained around 115 Mtpa for the last seven years (Chart 2). The overall tonnage pending stayed more or less the same and again barely affected the long term average which has hovered around 213 mt for eight years.

Long term trends in replenishment rates (Chart 3) show that long term average sand and gravel replenishment rates have not been at parity for at least ten years and continue to fall whilst for crushed rock the long term replenishment has not been above parity since 2003. In 2012 crushed rock long term replenishment stood at 97% of parity over ten years, and for sand and gravel, 45%.

**TABLE 10 - TONNAGES APPROVED, REFUSED AND PENDING 1998-2012 (MILLION TONNES)**

<b>Sand and Gravel</b>	<b>1998</b>	<b>1999</b>	<b>2000</b>	<b>2001</b>	<b>2002</b>	<b>2003</b>	<b>2004</b>	<b>2005</b>	<b>2006</b>	<b>2007</b>	<b>2008</b>	<b>2009</b>	<b>2010</b>	<b>2011</b>	<b>2012</b>
Approved	48	39	31	44	58	15	17	41	15	61	24	21	14	18	18
Refused	4	5	1	6	19	11	5	8	5	7	0	5	0	1	6
Pending	98	64	83	88	54	91	103	110	111	55	75	78	78	89	86
<b>Total</b>	<b>150</b>	<b>108</b>	<b>115</b>	<b>138</b>	<b>131</b>	<b>117</b>	<b>125</b>	<b>159</b>	<b>131</b>	<b>123</b>	<b>99</b>	<b>104</b>	<b>92</b>	<b>108</b>	<b>110</b>

<b>Crushed Rock</b>	<b>1998</b>	<b>1999</b>	<b>2000</b>	<b>2001</b>	<b>2002</b>	<b>2003</b>	<b>2004</b>	<b>2005</b>	<b>2006</b>	<b>2007</b>	<b>2008</b>	<b>2009</b>	<b>2010</b>	<b>2011</b>	<b>2012</b>
Approved	252	30	168	56	73	5	3	52	21	419	58	6	42	211	128
Refused	10	0	5	5	5	9	10	0	0	0	0	0	0	0	0
Pending	156	107	118	76	52	85	50	57	482	67	29	193	193	74	80
<b>Total</b>	<b>418</b>	<b>137</b>	<b>291</b>	<b>137</b>	<b>130</b>	<b>99</b>	<b>63</b>	<b>109</b>	<b>503</b>	<b>486</b>	<b>87</b>	<b>199</b>	<b>235</b>	<b>285</b>	<b>208</b>

All Aggregates	1998	1999	2000	2001	2002	2003	2004	2005	2006	2007	2008	2009	2010	2011	2012
Approved	300	69	199	100	131	20	20	93	36	480	82	27	56	229	146
Refused	14	5	6	11	24	20	15	8	5	7	0	5	0	1	6
Pending	254	171	201	164	106	176	153	167	593	122	104	271	271	163	166
<b>Total</b>	<b>568</b>	<b>245</b>	<b>406</b>	<b>275</b>	<b>261</b>	<b>216</b>	<b>188</b>	<b>268</b>	<b>634</b>	<b>609</b>	<b>186</b>	<b>303</b>	<b>327</b>	<b>393</b>	<b>318</b>

**TABLE 11: TONNAGE 10 YR RUNNING AVERAGES 1998-2012 (see Chart 2)**

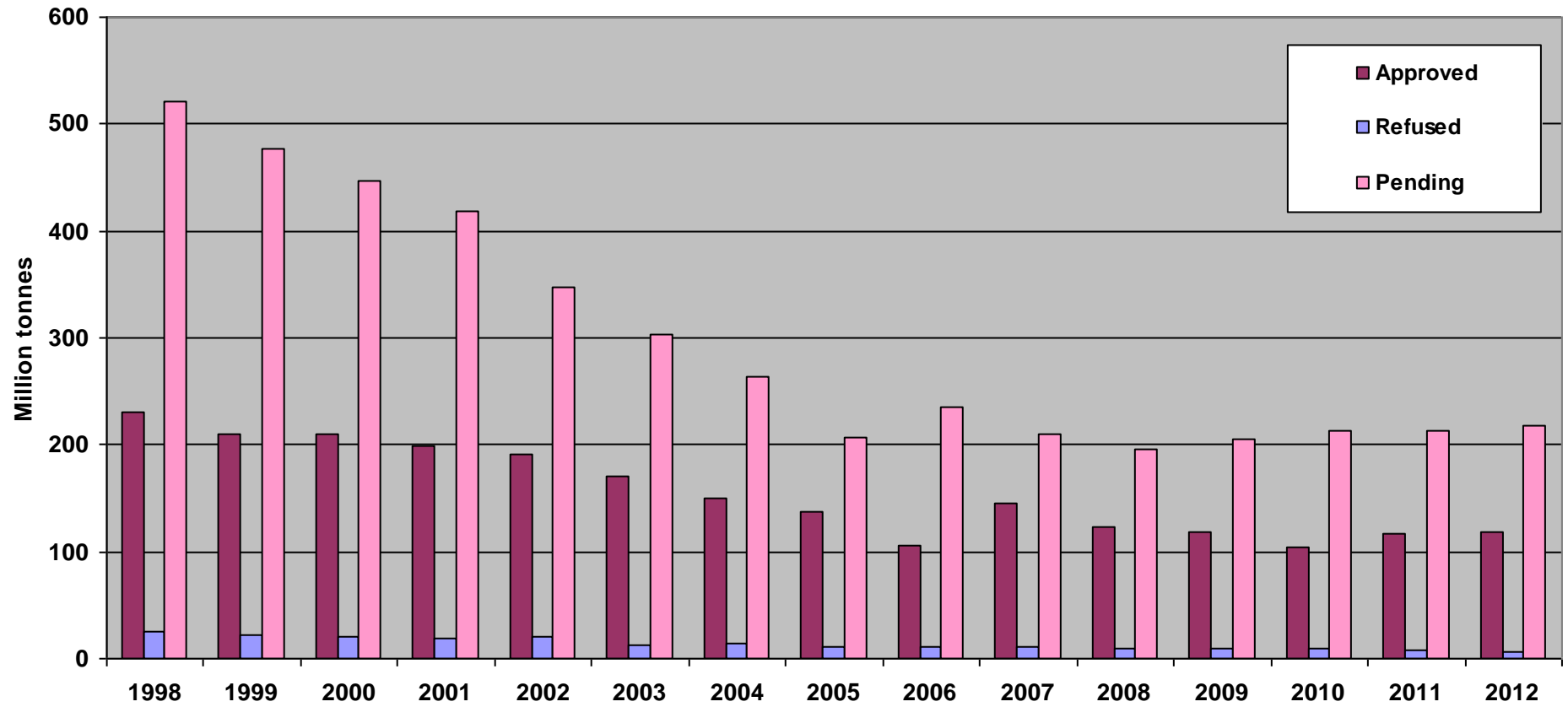
All Aggregates	1998	1999	2000	2001	2002	2003	2004	2005	2006	2007	2008	2009	2010	2011	2012
Approved	231	211	209	198	192	171	150	138	106	145	123	119	105	117	119
Refused	25	22	20	19	21	13	14	11	12	12	10	10	10	9	7
Pending	521	478	447	419	347	303	263	207	236	211	196	206	213	213	219
<b>Total</b>	<b>781</b>	<b>714</b>	<b>680</b>	<b>639</b>	<b>563</b>	<b>489</b>	<b>430</b>	<b>358</b>	<b>354</b>	<b>367</b>	<b>329</b>	<b>335</b>	<b>327</b>	<b>339</b>	<b>344</b>

**TABLE 12: REPLENISHMENT RATES GB 2003-2012 (see Chart 3)**

Percentages	Mineral	2003	2004	2005	2006	2007	2008	2009	2010	2011	2012
Annual Replenishment	Sand & Gravel	21	24	59	23	87	46	53	35	44	42
	Crushed Rock	5	3	48	20	358	56	7	50	260	158
Running Average Replenishment	Sand & Gravel	71	67	59	44	50	49	49	49	49	45
	Crushed Rock	112	97	90	68	97	80	78	67	88	97

NB. Replenishment rates are calculated by dividing MPA members' tonnage approved each year by members' output as recorded by MPA survey.

**Chart 2: 10 yr Running Average Tonnages Approved, Refused & Pending 1998-2012  
Great Britain (All Aggregates)**



**Chart 3: GB Rolling Average Replenishment Rates for Sand & Gravel & Crushed Rock  
2003-2012**



## SECTION FOUR – DECISION TIMES

The overall percentage of approvals determined within 6 months was just 14% in 2012. The overall percentage of approvals taking over 12 months to determine remained over 64% in 2012. The average time taken from pre-application discussions to approval for sand and gravel applications in 2012 was 41 months, which was heavily influenced by one application submitted in 1998. For crushed rock, in 2012 the average period was 26 months. The long term average pre-application period in 2012 for sand and gravel was zero since the times were not submitted in the survey results. For crushed rock the average was 12 months. Chart 4 shows the long term running averages for time to determine applications. This demonstrates a long term trend for applications taking under 4 months to determine to rise at the expense of applications taking from 4 months to a year; those taking over 12 months to determine remaining broadly the same.

**TABLE 13 – DURATION OF APPROVAL PROCESS 1998-2012 (No.s of applications) - SAND AND GRAVEL**

Sand and Gravel	1998	1999	2000	2001	2002	2003	2004	2005	2006	2007	2008	2009	2010	2011	2012
0-4 months	1	2	6	2	3	5	5	3	1	1	5	2	1	1	1
4-6 months	5	1	4	1	2	3	2	3	0	4	5	3	0	2	1
6-8 months	4	1	3	2	0	2	3	1	0	2	0	3	1	0	1
8-10 months	1	3	0	2	4	1	1	3	2	0	1	2	1	1	2
10-12 months	3	2	2	6	2	1	1	2	1	2	2	0	1	1	0
12 months +	24	15	15	15	16	7	8	16	11	19	13	11	7	9	9
<b>Total</b>	<b>39</b>	<b>24</b>	<b>30</b>	<b>28</b>	<b>27</b>	<b>19</b>	<b>20</b>	<b>28</b>	<b>15</b>	<b>28</b>	<b>26</b>	<b>21</b>	<b>11</b>	<b>14</b>	<b>14</b>

**TABLE 14 - DURATION OF APPROVAL PROCESS 1998-2012 (No.s of applications) - CRUSHED ROCK**

Crushed Rock	1998	1999	2000	2001	2002	2003	2004	2005	2006	2007	2008	2009	2010	2011	2012
0-4 months	2	1	0	0	1	1	0	2	2	2	1	0	0	1	5
4-6 months	2	2	0	1	4	0	0	1	1	1	1	0	0	0	0
6-8 months	2	0	1	1	0	0	1	0	1	1	0	1	0	0	1
8-10 months	0	0	1	2	1	0	0	0	1	0	0	0	0	1	0
10-12 months	0	1	0	0	1	1	0	0	1	0	0	0	0	0	0
12 months +	13	3	10	6	10	2	2	7	1	4	7	2	4	9	10
<b>Total</b>	<b>19</b>	<b>7</b>	<b>12</b>	<b>10</b>	<b>17</b>	<b>4</b>	<b>3</b>	<b>10</b>	<b>7</b>	<b>8</b>	<b>9</b>	<b>3</b>	<b>4</b>	<b>11</b>	<b>16</b>

**TABLE 15 – ANNUAL AVERAGE DURATION OF APPROVAL PROCESS 1998-2012 - SAND AND GRAVEL (MONTHS)**

Sand and Gravel	1998	1999	2000	2001	2002	2003	2004	2005	2006	2007	2008	2009	2010	2011	2012
Pre-App Consultation	8	10	11	9	8	7	8	8	8	10	17	13	12	13	0
Determination Period	17	21	21	20	19	17	14	23	27	23	17	23	16	25	41
<b>Average Total*</b>	<b>25</b>	<b>31</b>	<b>32</b>	<b>29</b>	<b>27</b>	<b>24</b>	<b>22</b>	<b>31</b>	<b>35</b>	<b>33</b>	<b>34</b>	<b>36</b>	<b>28</b>	<b>38</b>	<b>41</b>

**TABLE 16 - ANNUAL AVERAGE DURATION OF APPROVAL PROCESS 1998-2012 - CRUSHED ROCK (MONTHS)**

Crushed Rock	1998	1999	2000	2001	2002	2003	2004	2005	2006	2007	2008	2009	2010	2011	2012
Pre-App Consultation	12	12	14	13	11	14	16	10	6	9	23	14	10	8	12
Determination Period	27	11	26	20	24	19	24	21	12	13	31	18	26	22	26
<b>Average Total*</b>	<b>39</b>	<b>23</b>	<b>40</b>	<b>33</b>	<b>35</b>	<b>33</b>	<b>40</b>	<b>31</b>	<b>18</b>	<b>22</b>	<b>54</b>	<b>32</b>	<b>36</b>	<b>30</b>	<b>38</b>

\*Note - Not all returns include information on pre-application consultations, the average is of the number of applications that reported details of such consultations

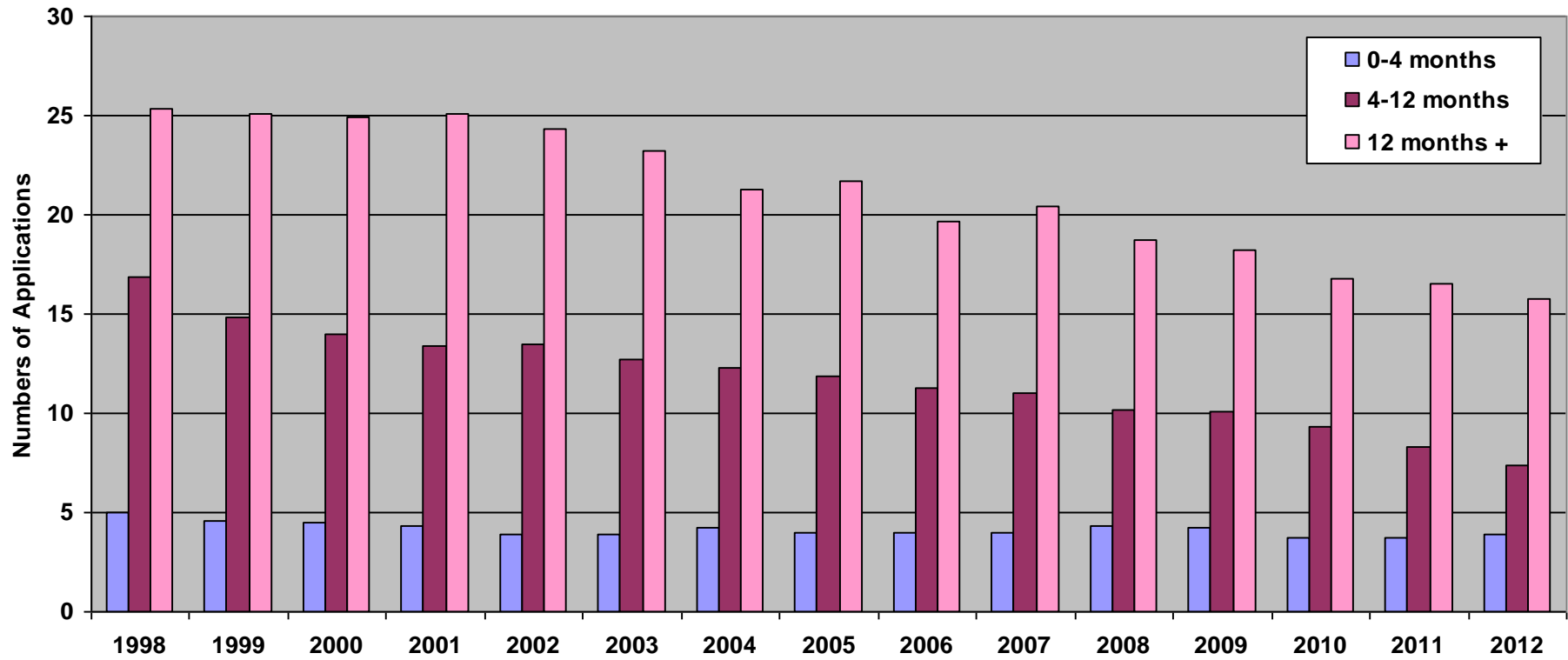
**TABLE 17: RUNNING AVERAGE OF APPLICATIONS IN 'TIME TO PROCESS' CATEGORIES (No.s of applications) 1998-2012 (see Chart 4)**

All Aggregates	1998	1999	2000	2001	2002	2003	2004	2005	2006	2007	2008	2009	2010	2011	2012
0-4 months	5	5	5	4	4	4	4	4	4	4	4	4	4	4	4
5-12 months	17	15	14	13	14	13	12	12	11	11	10	10	9	8	7
12 months +	25	25	25	25	24	23	21	22	20	20	19	18	17	17	16
<b>Total</b>	<b>47</b>	<b>45</b>	<b>43</b>	<b>43</b>	<b>42</b>	<b>40</b>	<b>38</b>	<b>38</b>	<b>35</b>	<b>35</b>	<b>33</b>	<b>33</b>	<b>30</b>	<b>29</b>	<b>27</b>

**TABLE 18: RUNNING AVERAGE TIME FROM SUBMISSION TO APPROVAL (MONTHS) 1998-2012 (see Chart 5)**

All Aggregates	1998	1999	2000	2001	2002	2003	2004	2005	2006	2007	2008	2009	2010	2011	2012
Average Time S&G	25	31	32	29	27	24	22	31	35	33	34	36	28	38	38
Average Time CR	39	23	40	33	35	33	40	31	18	22	54	32	36	30	30
Running Average S&G	27	27	28	28	28	28	27	27	27	29	30	30	30	31	32
Running Average CR	34	33	34	34	34	34	34	34	33	31	33	34	33	33	34

**Chart 4: 10 yr Running Average of Applications Approved in 'Time To Determination' Categories  
(All Aggregates) 1998-2012**



**Chart 5: Average Times From Pre-application Consultations to Approval For All Aggregates  
1998-2012**

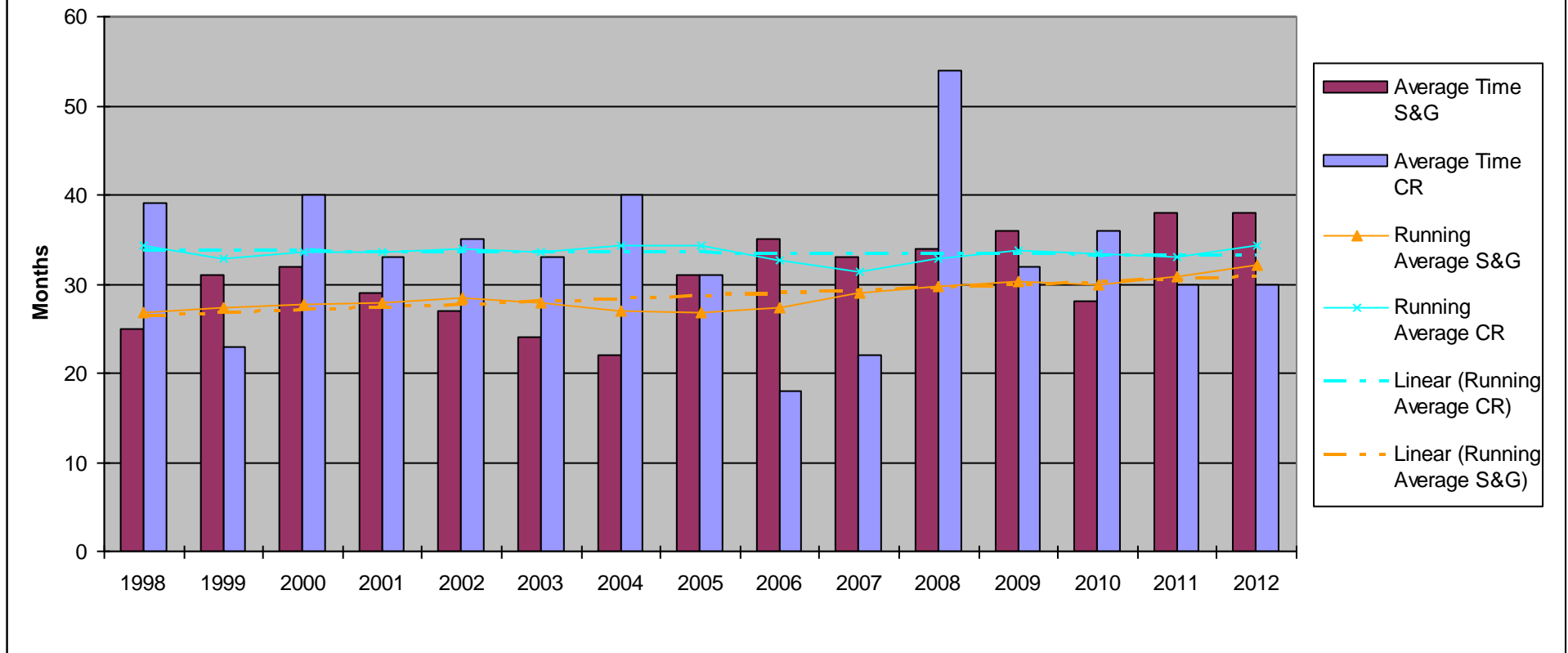
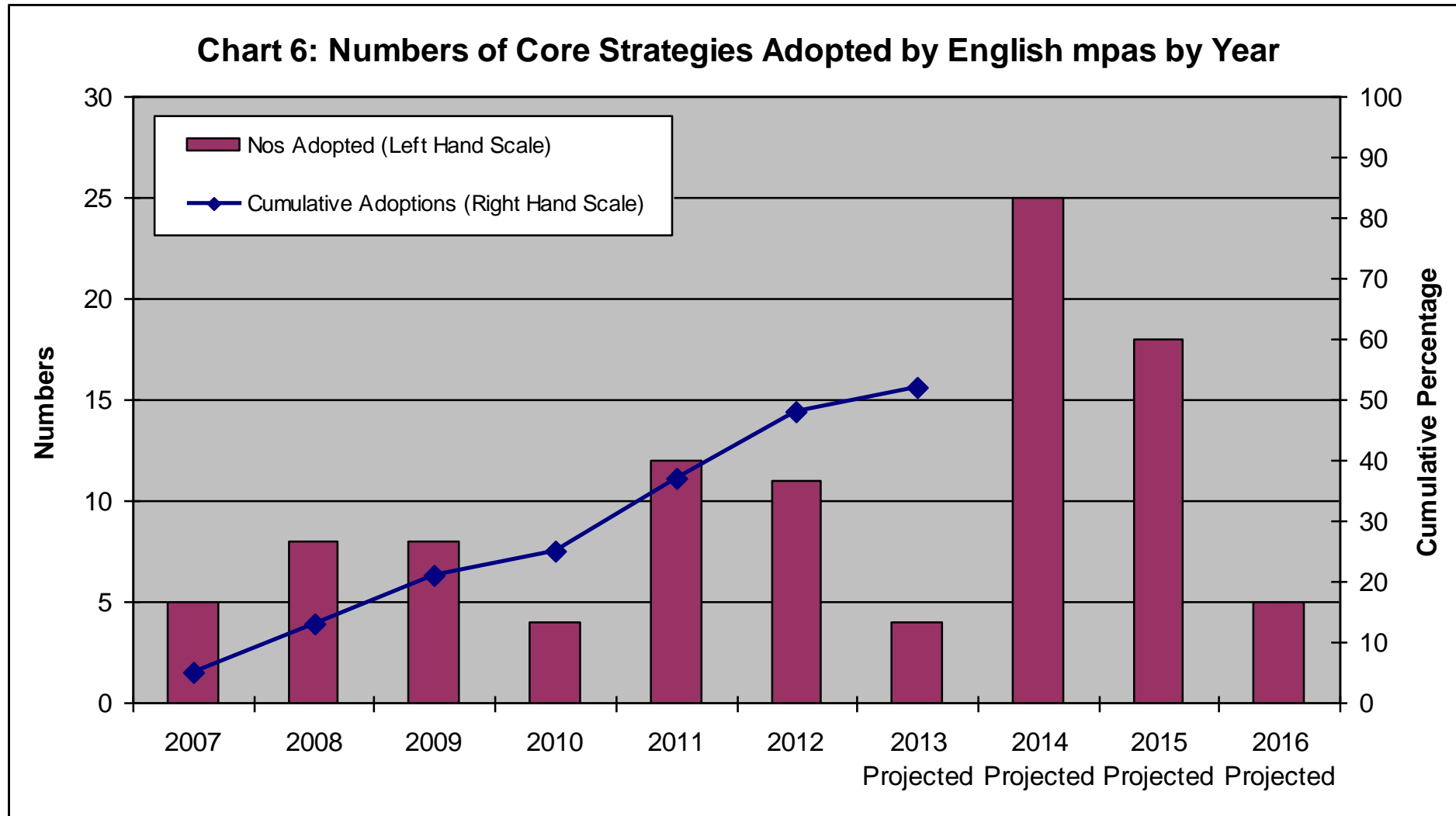


Chart 5 takes data from Table 18 to show that the long term average length of time applications are taking to get through the system to approval has changed over 15 years, with crushed rock consistently remaining around 33-34 months over the 15 year period, whilst sand and gravel applications have increased slowly but significantly since 2007 from around 27 months to 32 months towards the long term average for crushed rock. This is significant because sand gravel proposals have traditionally been seen as less complicated and therefore easier to process than crushed rock applications. If current trends continue, there will be little difference between the two types of proposals in terms of complexity and process time in the future.

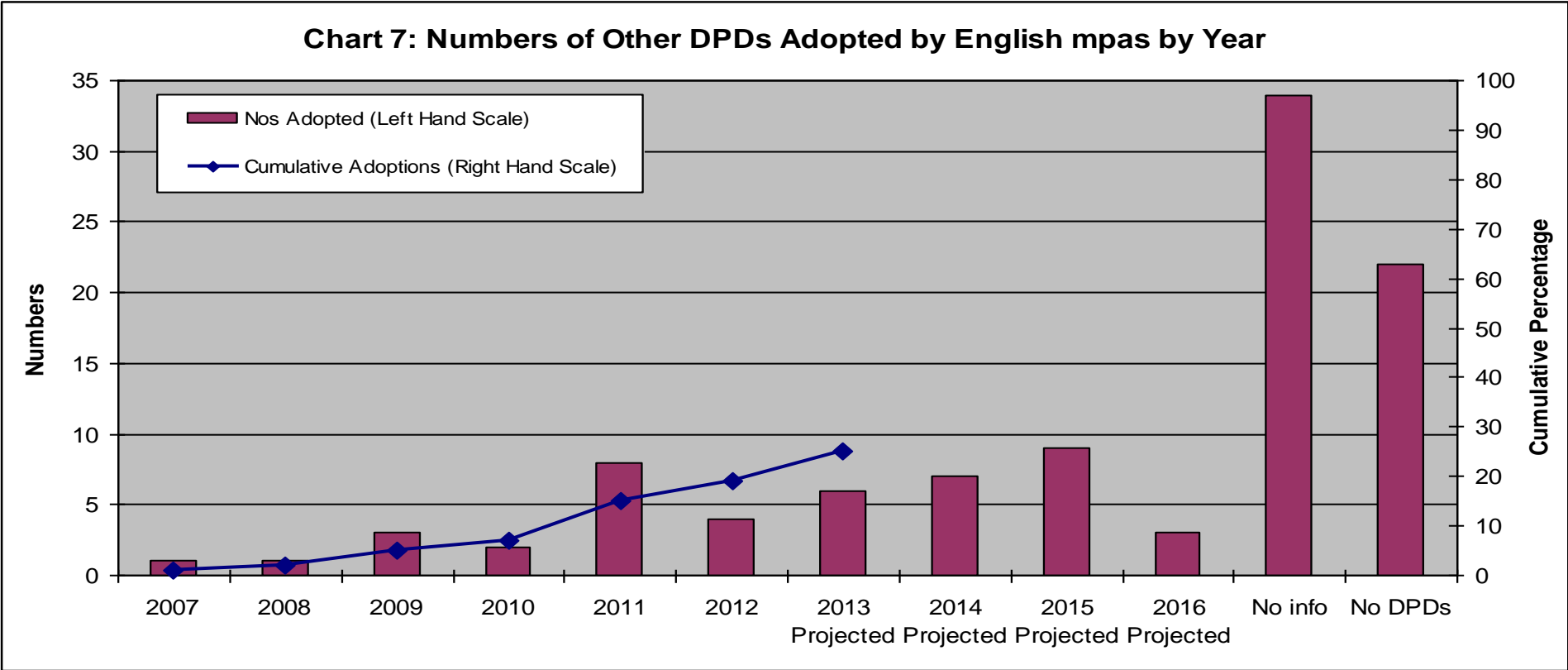


## SECTION FIVE – DEVELOPMENT PLAN PROGRESS

The MPA monitors 100 mineral planning authorities (mpas) in England and Wales each month on progress in the adoption of Local Plans including Core Strategies and other DPDs as appropriate. Chart 6 shows progress to date for Core Strategies in England.



The monitoring data shows that nearly 10 years after the institution of spatial planning and portfolio style plans in England only 51% of plans are projected to be adopted by the end of 2013. Some authorities have barely started the process and 30 plans have yet to reach the stage of Regulation 19 consultation (Publication Draft Plan). This is in the context of many grossly out of date plans; for example, North Yorkshire’s Minerals Local Plan was adopted in December 1997, whilst Lincolnshire’s Mineral local Plan is even older being adopted in 1991. The position with other DPDs in England such as Site Allocations and Development Management Policies (where not incorporated in Core Strategies), is even more pronounced. Only 25% of such documents are projected to be adopted by the end of 2013 and by 2016 this will rise to only 44%. Of the remainder in 34 cases there is no information in Local Development Schemes about authorities’ intentions regarding minerals, whilst a further 22 have no intention of producing other documents; all matters regarding minerals to be subsumed within one Local Plan.



In Wales the situation is much clearer. Of the 25 unitary authorities in the principality, 44% have been adopted and by the end of 2013 80% will have reached the Deposit stage.

## AMPS2 REPORT - Summary of LAAs and Landbanks as at November 2013

### South East, London, East England, South West

Mineral Planning Authority	Guidelines/Sub-regional Apportionment (mtpa)		LAA or MWCS/MLP date	LAA figure (mtpa)		MLP figure (mtpa)		Calculation method	Difference between LAA & Apportionment (mtpa)		Landbank Based on provision in * LAA ** MWCS/MLP ***2011 RAWP	
	S&G	Rock		S&G	Rock	S&G	Rock		S&G	Rock	S&G	Rock
Bucks	1.05		LAA Oct 2013 MWCS Nov 12	0.96		1.09		10 year ave 10 year ave	+ 0.04		9.2**	
West Berks			LAA Nov 2013	0.44				10 year ave			7.9	
Rest of Berks	1.33										7.5***	
Hampshire	2.05		LAA Dec 2012; MWP Adopted Oct 2013 2013 LAA Nov 2013	1.41 1.27	0.73 imports	1.56		10 year ave	-0.49 -0.78		9.8* 1 0.4** 10.6	
IoW	0.10		LAA Feb 2013	0.09		0.1		10 year ave 2002-11	-0.01		12*	
Kent	1.63	0.78	LAA May 2012	1.68		1.66		10 year average 2001-10	+0.03		12.3*	38*
Oxon	2.10	0.66	LAA June 2013 10 year ave Consumption (demand) LAA Nov 2013	1.00 1.2 1.0	0.47 0.58	1.26	0.63	10 year ave 2003-12 Per capita consumption (demand) 10 year ave	-1.10 -0.9 -1.10	-0.19 -0.08	8.2* 6.9* 8.25*	24.5* 19.8*
Surrey	1.27		LAA July 2013	1.45		1.4		10 year ave 2003-12	+0.18		6.5* 6.7**	
E Sussex, B&H	0.10		Nov 2013								>7.0***	
W Sussex	1.03		Nov 2013	0.5				10 year ave	-0.53		9.5*	
Milton Keynes	0.28		Nov 2013	0.17				3 year ave			2*	
Medway	0.18		Nov 2013	0.18				SE Plan			6.7**	

								(10 yr ave 0.024)				
Cambridge /Peterboro	2.88	0.20	Dec 2012	2.58		3.00		10 year ave 2002-11	-0.30		15.7***	21.3***
C Beds, Bedford, Luton	1.84		Draft July 2013	1.37		1.84		10 year ave 2003-12	-0.47		11.7**	
Essex	4.31		Submission MLP 2013	3.62		4.31		10 year ave 2002-11	-0.69		8.3***	
Herts	1.39		Nov 2012	1.17				10 year ave 2002-11	-0.22		12.0***	
Norfolk	2.57	0.20	Draft July 2013	1.99	0.13	2.57		10 year ave 2002-11	-0.58	-0.07	6.3*	8.6*
Suffolk	1.62		Dec 2012	1.39				10 year ave 2002-11	-0.23			
Cornwall	!!	1.68	Nov 2012		1.49			10 year ave 2001-11		-0.19	!!	87.3*
Devon†	0.93	3.20	Nov 2012	0.61	2.28			'weighted' 10 year ave 2002-11 (2011 weighted 10, 2002 weighted 1)	-0.32	-0.92	15*	64.5*
Dorset	1.97	0.30	Post EiP Mods July 2013	1.58	0.27	1.58	0.27	10 year ave	-0.39	-0.03	11.1**	48**
Glos	1.00	2.25	May 2013	0.85	1.68			10 year ave 2002-11	-0.15	-0.57	7.9*	18.5*
Wilts & Swindon	1.40		July 2012 Part of DPD evidence base	1.00		1.85		10 year ave 2002-11	-0.40		3.0*	
West of England ††		4.94	Draft Mar 2013		4.20		4.94	10 year average 2001-10		-0.74		36.3*
Somerset †††	!!	13.40	Draft July 2013		10.81			10 year ave 2002-11		-2.59	!!	41.7*
LONDON# Redbridge	0.70 0.10		In preparation	0.83 0.125		0.70		10 year ave 2003-12 10 year ave			1.4 10*	
Running Total									-5.92	-5.3		

† includes Devon CC, Dartmoor NPA, Exmoor NPA, Plymouth City, Torbay

†† Includes BANES, Bristol City, North Somerset DC, South Glos DC

††† Includes Exmoor NPA

!! Landbank held jointly between Somerset, Devon & Cornwall

# comprises five separate LAAs for Havering, Hillingdon, Hounslow, Redbridge & Rest of London

East Midlands, West Midlands, North West, York & Humber, North East

Mineral Planning Authority	Guidelines/Sub-regional Apportionment (mtpa)		LAA or MWCS/MLP date	LAA figure (mtpa)		MLP figure (mtpa)		Calculation method	Difference between LAA and Apportionment (mtpa)		Landbank Based on *LAA ** MWCS/MLP ***2009 RAWP	
	S&G	Rock		S&G	Rock	S&G	Rock		S&G	Rock	S&G	Rock
Derbys/ PDNP	1.49 0.00	8.74 4.05	Draft Mar 2013 Draft Mar 2013	1.35 0.00	8.59 3.20	N/A N/A	N/A 3.20	10 yr av 2002-11 10 yr av 2002-11	-0.14 0.00	-0.15 -0.85	*6.5 *0.0	*66.9
Leics/ Rutland	1.25 0.00	1.60 Lst 14.80 Ign 0.00	Draft May 2013	1.22 0.00	1.50 Lst 13.10 Ign €	1.25 0.00	1.60 Lst 14.80 Ign 0.30	10 yr av 2002-11 10 yr av 2002-11	-0.30 €	-0.10 Lst -1.70 Ign €	*9.0	*29.0 Lst *30.0 Ign €
Lincs	3.06	1.70	Draft Sep 2013	2.74	1.13	N/A	N/A	10 yr av 2001-10	-0.32	-0.57	*7.6	*45.8
Northants	0.97	0.39	Final Sep 2013	0.45	0.32	0.97	0.39	11 yr av 2001-11	-0.52	-0.07	*10.2	*45.7
Notts	3.25 0.57f	0.26	Draft Nov 2012	2.58 0.46f	0.08	2.65 0.70f	0.26	11 yr av 2001-11	-0.79 - 0.11f	-0.18	*7.5 *14.8f	*41.9
Durham	0.31	3.71	Draft Mar 2013	0.29	3.20	N/A	N/A	10 yr av 2001-10	-0.02	-0.51	*28.2	*42.7
Northum'd/NNP	0.82	2.10	Draft Mar 2013	0.54	1.73	N/A	N/A	10 yr av 2001-10	-0.28	-0.37	*17.8	*45.8
Teesside	0.18	0.19	No Information	0.02	0.09	0.01	0.15	10 yr av 2001-10	-0.16	-0.10	***€	***€
Tyneside	0.19	0.19	Draft Mar 2013	0.25	0.28	N/A	N/A	10 yr av 2001-10	-0.06	+0.90	*20.0	*35.5
Chesh E	0.71	0.66	Draft May 2013	0.53	0.03	N/A	N/A	10 yr av 2001-10	-0.18	-0.63	*3.3	*143.0
Chesh W	0.80	0.00	Draft Undated	0.72	0.00			10 yr av 2003-12	-0.08	0.00	*12.9	*0.0
Cumbria	0.88	4.02	Draft Mar 2013	0.76	3.75	0.70	4.10	10 yr av 2001-10	-0.12	-0.57	*15.1	*45.4
GM/MYS/W	0.43	1.32	Draft May 2013	0.39	1.07	0.43	1.32	10 yr av 2001-10	-0.04	-0.25	*12.4	*15.9

Lancs	0.44	4.24	Draft Undated	0.40	3.75	0.50	4.55	10 yr av 2001-10	-0.04	-0.49	*22.0	*35.5
Hereford	0.28	0.42	In Preparation ð								***18.2	***43.3
Salop/ Telford	0.82	2.95	In Preparation ð								***17.6	***39.3
Staffs	6.60	1.40	Draft	5.40	€	N/A	N/A	10 yr av 2002-11	-1.20	€	*13.0	*€
Warwicks	1.04	0.88	Overdue ð								***3.8	***33.1
Worcs	0.87	0.16	June 2013	0.87	0.00	N/A	N/A	10 yr av 2001-10	0.00	-0.16	*4.5	*€
W Midl'ds County	0.51	0.00	No information ð								***10.0	***0.00
Humbers	1.07	0.28	In Preparation			N/A	N/A				***10.1	***6.2
N Yorks/ YDNP/ NYMNP/ York City	2.50	3.67	Draft Mar 2013	2.30	3.50	2.63	4.63	10 yr av 2002-11	-	-0.17	*7.0	*28.0
	0.00	3.69	Draft Mar 2013	0.00	3.50	0.00	N/A	10 yr av 2002-11	0.20	-0.19	*0.0	*29.6
	0.00	0.00	Draft Mar 2013	0.00	0.10	N/A	N/A	10 yr av 2002-11	0.00	-0.10		
	0.00	0.00	Draft Mar 2013	0.00	0.00	N/A	N/A	N/A	0.00	N/A		
Doncaster/ Rotherham	0.75	2.74	Final Sep 13	0.75	2.54	0.81	3.34	10 yr av 2000-09	0.00	-0.20	*5.6	*+22.4
Barnsley/ Sheffield	0.00	0.00	No information									
W Yorks	0.55	0.96	In Preparation			N/A	N/A				***9.7	***28.3
<b>Running Total</b>									<b>-4.05</b>	<b>-6.46</b>		

€ - confidential

∫ - Sherwood Sandstone

ð - mpas in the West Midlands may carry out a joint LAA due to resource problems in some authorities