



MINERAL PRODUCTS ASSOCIATION

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

2013

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EXECUTIVE SUMMARY

- The survey recorded 17 new applications for mineral and 23 for Section 73 applications and ROMPS in 2013. Although extensions outnumber new sites by a ratio of 5:1 all of the new sites in the survey were for sand and gravel.
- Section 73 applications and ROMPS now comprise 55% of all applications submitted and pending, and 45% of approvals. For the first time, two Section 73 applications for extensions of time were refused.
- 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 for mineral submitted annually have more than halved to 24 a year.
- Average approvals have consistently remained at between 32% and 36% of average 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 2013 for sand and gravel six times as much material was progressing through the planning system as was being permitted.
- The tonnage of crushed rock approved in 2013 was above the long term average. The tonnage refused was zero for a record ninth 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 2013 the ten year average stood at 47%. The replenishment rate for crushed rock rose above parity in 2013 for the first time in 10 years and stood at 104%.
- 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 at 35 months to determination now exceeding for the first time that of crushed rock applications at 34 months to determination.
- By end of 2013 only 47% of monitored English mpa Core Strategies had been adopted and only 22% of Other DPDs. In Wales 56% of Local Development Plans are adopted with 80% having reached the Deposit stage (prior to examination).
- Of the 175 permissions granted between 2006 and 2013 30% were for crushed rock and 70% for sand and gravel (Table 19). Of the latter there were 16 new sand and gravel sites which mean that extensions represent 90% of all approvals (Table 19).
- The tonnage permitted between 2006 & 2013 was over 1.1 Billion tonnes, 83% of which was for crushed rock (Table 19).
- Only 44% of approvals between 2006 & 2013 were allocated sites despite having a plan-led system (Table 20A). However, over 90% of those applications attracted a recommendation from officers of approval, which reflects the care with which sites and proposals are chosen and applications put together to be acceptable environmentally (Table 20B).
- Between 2006 & 2013 there was a marked difference between the time that extensions took to process compared with new sites and not much difference between crushed rock and the majority of sand and gravel applications (Table 24).

INTRODUCTION

The Mineral Products Association's Annual Mineral Planning Survey (AMPS) of members' aggregate applications, appeals and decisions for the year 2013 is set out in this Report. An additional analysis is included which looks at approvals between 2006 & 2013 in more detail.

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 64% of those members with aggregates quarrying interests, which represent 80% of UK aggregates production capacity. 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 1999-2006 relate to the former QPA members only.

SECTION ONE - SCALE OF SURVEY

Out of a total of 128 sites the survey recorded a total of 57 mineral bearing sites about 75% of which were carried forward from previous returns, plus a further 71 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, 73% were sand and gravel and 27% were crushed rock, whilst extensions outnumbered new sites by about 5:1. All of the new sites in the survey were for sand and gravel. This means that all crush rock applications for mineral were extensions. In total there were nine new sand and gravel sites pending a determination in 2013. Pre-application discussions for new sites averaged 21 months, whilst those for extensions were shorter at an average of 15 months.

Sand and gravel applications handled by Mineral Planning Authorities continue to be larger in number than crushed rock applications by a ratio of nearly 3:1. Since 1999 there has been a marked drop in the average number of applications being handled for all aggregates (mineral bearing and administrative applications) with averages of 150 a year before that date and 94 after, a drop of about 38%. Although there were more applications in the system reported in 2013 this was largely due to the presence of 'administrative' applications such as extensions of time and ROMPS, which for the first time exceeded the mineral bearing applications by a ratio of 55:45.

SECTION TWO - TRENDS IN DECISIONS

SAND AND GRAVEL (MINERAL BEARING)

The number of applications submitted in 2013 at 11 was equivalent to the average over the last five years, compared to pre-recessionary times when the numbers of applications averaged 29 per year. Approvals also stayed 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 increased to 31; or 23% below the long term average of 40. There were no refusals and no withdrawals. Overall, sand and gravel applications approved, refused, pending and withdrawn were 37% below the long term trend of 65.

TABLE 1 - SAND AND GRAVEL APPLICATIONS SUBMITTED 2013 (numbers; mineral only)

	1999	2000	2001	2002	2003	2004	2005	2006	2007	2008	2009	2010	2011	2012	2013
Submitted (each year)	29	40	25	29	32	30	32	24	23	24	17	8	13	7	11

TABLE 2 - SAND AND GRAVEL APPLICATION DECISIONS/STATUS 2013 (numbers; mineral only)

Type of Decision	1999	2000	2001	2002	2003	2004	2005	2006	2007	2008	2009	2010	2011	2012	2013
Approved	24	30	28	27	19	20	28	15	28	26	21	11	14	10	10
Refused	3	1	5	7	6	3	4	1	1	0	4	0	1	2	0
Pending	32	49	49	28	39	50	56	52	40	45	37	37	29	24	31
Withdrawn	2	1	2	2	1	2	1	0	1	0	4	2	3	0	0
Total	61	81	84	64	65	75	89	68	70	71	66	50	47	36	41

TABLE 3 - SAND AND GRAVEL APPEAL DECISIONS/STATUS 2013 (numbers; mineral only)

Type of Decision	1999	2000	2001	2002	2003	2004	2005	2006	2007	2008	2009	2010	2011	2012	2013
Allowed	3	1	1	0	3	1	2	1	0	2	1	2	0	0	0
Dismissed	0	0	0	2	1	0	0	0	0	1	0	0	0	1	1
Pending	1	0	1	6	4	1	2	1	2	1	0	0	0	1	1
Withdrawn	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0
Total	4	1	2	8	8	4	4	2	2	4	1	2	0	2	2

CRUSHED ROCK (MINERAL BEARING)

There were six applications for crushed rock in 2013 which was slightly above the long term average. Approvals for crushed rock were higher than 2012 and exceeded long term average levels, whilst the number of applications on which a decision is pending is lower than the long term average of 10.7. There were no refusals (for the ninth successive year) or withdrawals for crushed rock applications in 2013 and only one appeal, the first for six years, which was allowed.

TABLE 4 - CRUSHED ROCK APPLICATIONS SUBMITTED 2013 (numbers)

	1999	2000	2001	2002	2003	2004	2005	2006	2007	2008	2009	2010	2011	2012	2013
Submitted (each year)	13	2	4	9	6	0	5	9	4	7	7	1	4	3	6

TABLE 5 - CRUSHED ROCK APPLICATION DECISIONS/STATUS 2013 (numbers)

Type of Decision	1999	2000	2001	2002	2003	2004	2005	2006	2007	2008	2009	2010	2011	2012	2013
Approved	7	12	10	14	3	3	10	7	8	9	3	4	11	5	8
Refused	0	1	0	2	2	2	0	0	0	0	0	0	0	0	0
Pending	18	16	15	8	8	4	6	16	12	9	11	11	8	11	8
Withdrawn	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0
Total	25	29	25	24	13	9	16	23	20	18	14	15	19	16	16

TABLE 6 - CRUSHED ROCK APPEAL DECISIONS/STATUS 2013 (numbers)

Type of Decision	1999	2000	2001	2002	2003	2004	2005	2006	2007	2008	2009	2010	2011	2012	2013
Allowed	0	0	0	0	1	1	1	0	0	0	0	0	0	0	1
Dismissed	0	0	0	0	1	0	0	0	1	0	0	0	0	0	0
Pending	0	0	1	1	0	0	0	1	0	0	0	0	0	0	0
Withdrawn	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0
Total	0	0	1	1	2	1	1	1	1	0	0	0	0	0	1

ALL AGGREGATES AND ROMP/SECTION 73 APPLICATIONS

The total number of mineral bearing applications approved in 2013 was 18, which was 36% below the long term trend of 28. The total number of applications refused or withdrawn was nil. The total number of applications on which a decision was pending at the year end was 39 in 2013; this is 31% below the long term average of 51.

TABLE 7: STATUS OF MINERAL BEARING APPLICATIONS 2013

Status	Sand & Gravel Tables 1 & 2	Crushed Rock Tables 4 & 5	Total
Approved	10	8	18
Refused	0	0	0
Pending	31	8	39
Withdrawn	0	0	0
Total	41	16	57
Submitted	11	6	17

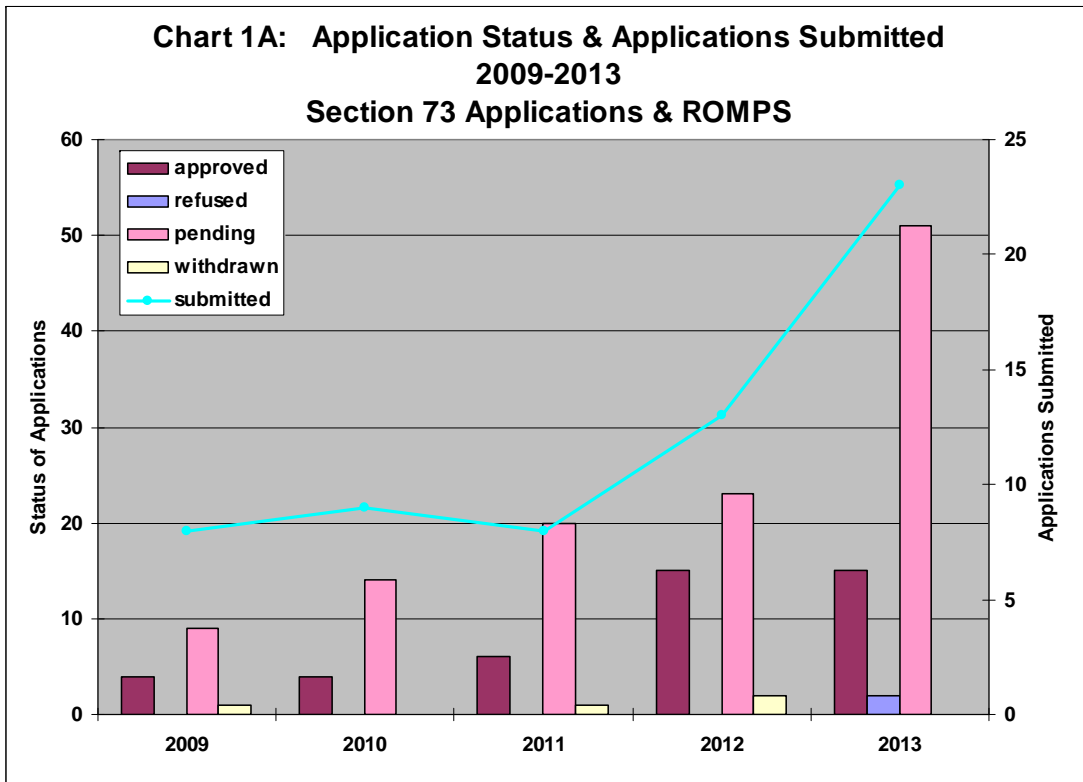
In 2013 there were 68 ROMP and Section 73 applications recorded in the survey representing a 70% increase over the previous year, including 23 submitted during the year and 51 which had been pending for an average of 19 months, the longest being submitted in 2005. This is an almost fivefold increase in this type of application in only five years (see Chart 1A). Five ROMPs were determined in the year with 13 outstanding. Section 73 applications decided in 2013 took an average of 12 months to determine. For the first time in the survey two Section 73 applications were refused, one of the grounds of the effect on a designated landscape, and the other on need. Members also recorded the length of pre-application discussions for these applications, which averaged 10 months, which is similar to the length of such discussions for Mineral bearing applications. This indicates that a higher proportion of Section 73 applications are EIA development with similar characteristics to other forms of mineral applications.

TABLE 8: NUMBERS OF ROMP & SECTION 73 APPLICATIONS 2013

Status	ROMP	Section 73	Total
Approved	5	10	15
Refused	0	2	2
Pending	13	38	51
Withdrawn	0	0	0
Total	18	50	68
Submitted	4	19	23

TABLE 8A: NUMBERS OF ROMP & SECTION 73 APPLICATIONS 2009-2013 [see Chart 1A]

Status	2009	2010	2011	2012	2013
Approved	4	4	6	15	15
Pending	9	14	20	23	51
Refused	0	0	0	0	2
Withdrawn	1	0	1	2	0
Total	14	18	27	40	68
Submitted	8	9	8	13	23

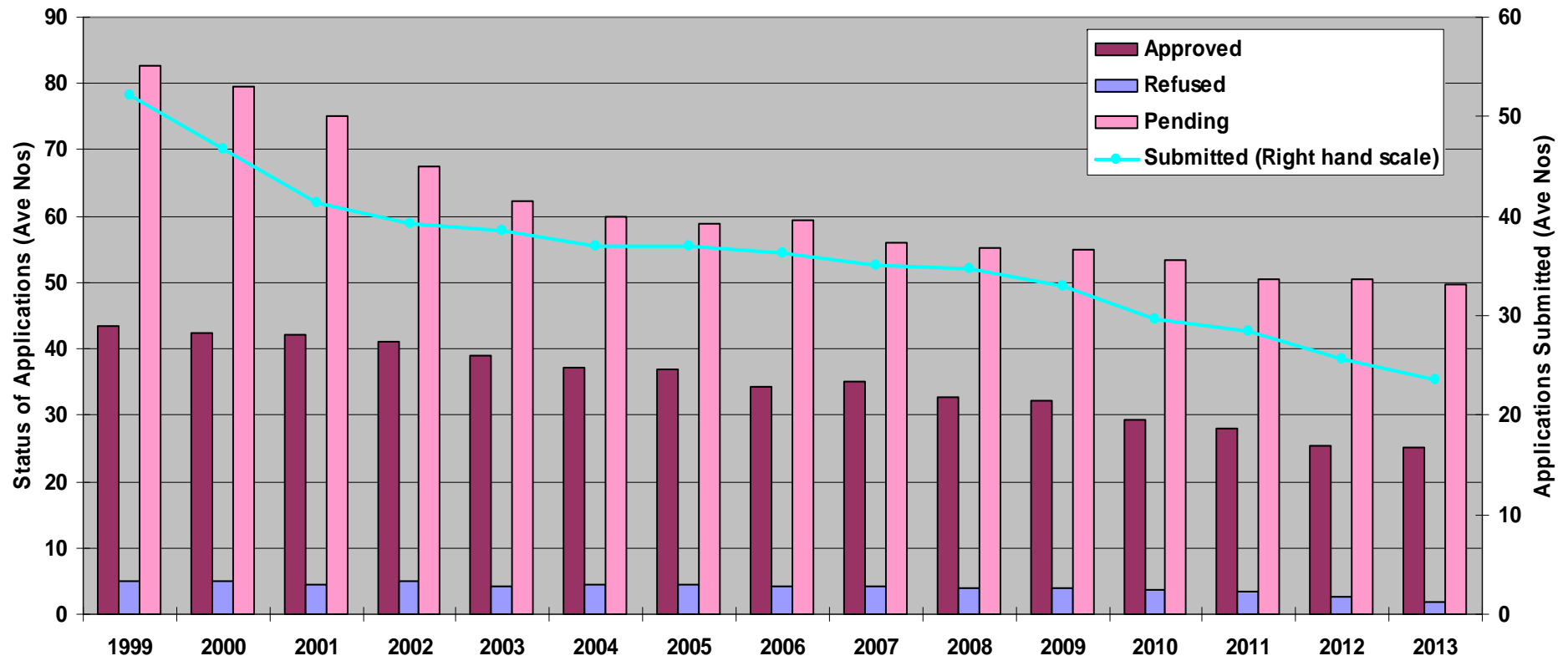


**TABLE 9: ALL AGGREGATES 10 YR RUNNING AVERAGES 1999-2013 (NB. Numbers may not sum due to rounding) [see Chart 1]
[Mineral Bearing applications]**

Type of Decision	1999	2000	2001	2002	2003	2004	2005	2006	2007	2008	2009	2010	2011	2012	2013
Approved	43	42	42	41	39	37	37	34	35	33	32	29	28	26	25
Refused	5	5	5	5	4	4	4	4	4	4	4	4	3	3	2
Pending	83	80	75	67	62	60	59	60	56	55	55	53	51	51	50
Withdrawn	5	4	4	3	2	2	2	2	2	1	1	2	2	2	1
Total	137	131	125	117	108	103	102	100	97	93	92	88	84	80	78
Submitted	52	47	41	39	39	37	37	36	35	35	33	30	28	26	24

Table 9 and Chart 1 shows the long term (10 year) running average of application status for each year for all aggregates (mineral bearing). 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 persisted and operators were increasingly preoccupied with securing the extension of time of existing operations that had come to the end of their planning permission prematurely. Approvals have also declined in proportion to the total number of applications in the survey and have consistently remained at between 32% 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.

**Chart 1: 10 yr Running Average of Application Status & Applications Submitted 1999-2013
Great Britain (All Aggregates)**



SECTION THREE - TONNAGES ASSOCIATED WITH DECISIONS

In 2013 the tonnage of sand and gravel approved was slightly lower the previous year, and remained only 64% of the long term approval rate of 25 Mt. The sand and gravel tonnage on which a decision was pending rose to 96 Mt which is above the long term average of 88 Mt. Six times as much material is currently progressing through the planning system than is being permitted in the current year. Sand and gravel tonnages applied for in the last eight years have fallen by half to 22 Mt.

The tonnage of crushed rock approved in 2013 fell to a quarter of the peak of 2011. The tonnage refused was zero for a record ninth year in a row. The tonnage pending fell to 45 Mt which is the second lowest total for 15 years. Tonnages applied for crushed tend to vary significantly from year to year but apart from 2007 they have been falling for the last eight years.

The total tonnage approved fell to about half the long term average which apart from rises in 2007, 2011 & 2012 has remained around 124 Mtpa for the last seven years (Chart 2). The overall tonnage pending fell by 14% and was about 65% of the long term average of 215 mt.

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 rose above parity for the first time in 10 years. In 2013 crushed rock long term replenishment stood at 104% of parity over ten years, and for sand and gravel, 47%.

TABLE 10 - TONNAGES APPROVED, REFUSED AND PENDING COMPARED TO SUBMITTED 1999-2013 (MILLION TONNES)

Sand and Gravel	1999	2000	2001	2002	2003	2004	2005	2006	2007	2008	2009	2010	2011	2012	2013
Approved	39	31	44	58	15	17	41	15	61	24	21	14	18	18	16
Refused	5	1	6	19	11	5	8	5	7	0	5	0	1	6	0
Pending	64	83	88	54	91	103	110	111	55	75	78	78	89	86	96
Total	108	115	138	131	117	125	159	131	123	99	104	92	108	110	112
Submitted	-	-	-	-	-	-	-	46	17	39	18	25	12	20	22

Crushed Rock	1999	2000	2001	2002	2003	2004	2005	2006	2007	2008	2009	2010	2011	2012	2013
Approved	30	168	56	73	5	3	52	21	419	58	6	42	211	128	52
Refused	0	5	5	5	9	10	0	0	0	0	0	0	0	0	0
Pending	107	118	76	52	85	50	57	482	67	29	193	193	74	80	45
Total	137	291	137	130	99	63	109	503	486	87	199	235	285	208	97
Submitted	-	-	-	-	-	-	-	18	5	21	199	2	42	26	2

All Aggregates	1999	2000	2001	2002	2003	2004	2005	2006	2007	2008	2009	2010	2011	2012	2013
Approved	69	199	100	131	20	20	93	36	480	82	27	56	229	146	68
Refused	5	6	11	24	20	15	8	5	7	0	5	0	1	6	0
Pending	171	201	164	106	176	153	167	593	122	104	271	271	163	166	141
Total	245	406	275	261	216	188	268	634	609	186	303	327	393	318	209
Submitted	-	-	-	-	-	-	-	64	22	60	217	27	54	46	24

TABLE 11: TONNAGE 10 YR RUNNING AVERAGES 1999-2013 (see Chart 2)

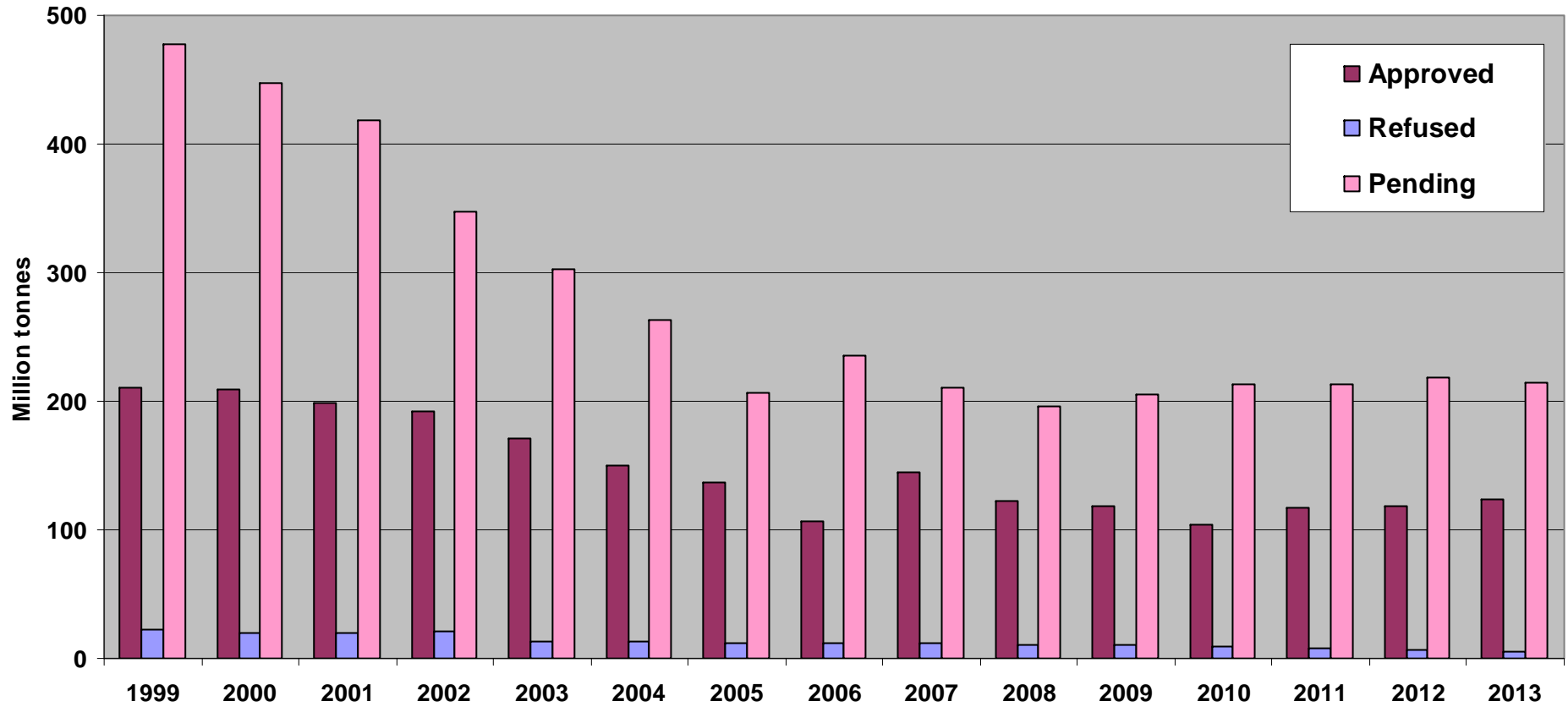
All Aggregates	1999	2000	2001	2002	2003	2004	2005	2006	2007	2008	2009	2010	2011	2012	2013
Approved	211	209	198	192	171	150	138	106	145	123	119	105	117	119	124
Refused	22	20	19	21	13	14	11	12	12	10	10	10	9	7	5
Pending	478	447	419	347	303	263	207	236	211	196	206	213	213	219	215
Total	714	680	639	563	489	430	358	354	367	329	335	327	339	344	344

TABLE 12: REPLENISHMENT RATES GB 2004-2013 (see Chart 3)

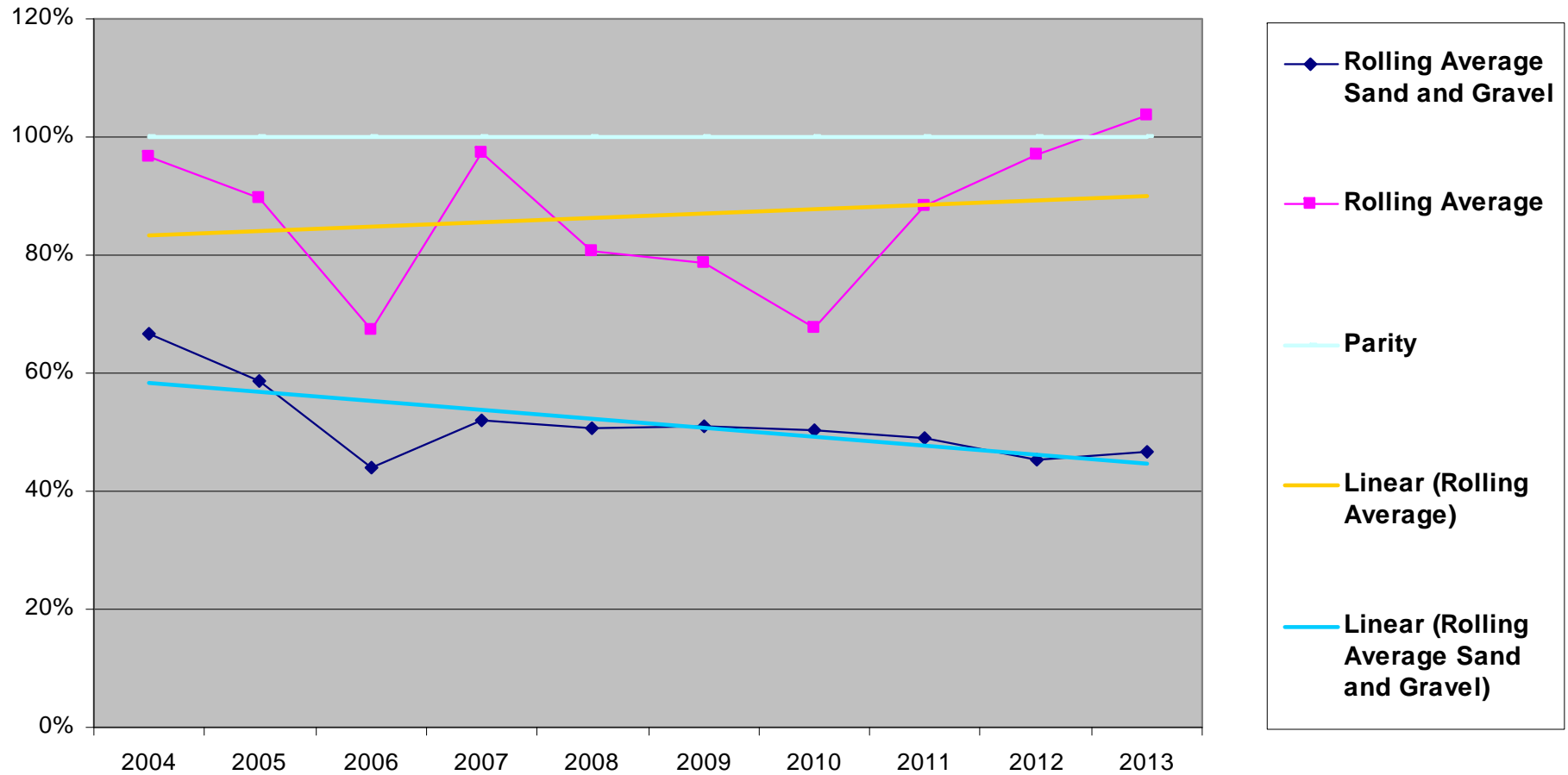
Percentages	Mineral	2004	2005	2006	2007	2008	2009	2010	2011	2012	2013
Annual Replenishment	Sand & Gravel	24	59	23	87	46	53	35	44	42	34
	Crushed Rock	3	48	20	358	56	7	50	260	158	69
Running Average Replenishment	Sand & Gravel	67	59	44	50	49	49	49	49	45	47
	Crushed Rock	97	90	68	97	80	78	67	88	97	104

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 1999-2013
Great Britain (All Aggregates)**



**Chart 3: GB Rolling Average Replenishment Rates for Sand & Gravel & Crushed Rock
2004-2013**



SECTION FOUR – DECISION TIMES

The overall percentage of approvals in 2013 determined within 6 months was just 11%, whilst for approvals taking over 12 months to determine the percentage was 72%. These proportions are close to long term averages although there is evidence that a trend for a larger proportion of applications to take longer than 12 months to process is emerging. The average time taken from pre-application discussions to approval for sand and gravel applications in 2013 increased substantially, whilst for crushed rock the average period fell. The long term average pre-application period in 2013 for sand and gravel was 18 months whilst for crushed rock it was 14 months. Chart 4 shows the long term running averages for time to determine applications. This demonstrates a long term trend for numbers of applications taking under 4 months to determine (minor applications) to rise at the expense of applications taking from 4 months to a year; whilst those taking over 12 months to determine also show signs of increasing.

TABLE 13: DURATION OF APPROVAL PROCESS 1999-2013 (No.s of approvals) - SAND AND GRAVEL

Sand and Gravel	1999	2000	2001	2002	2003	2004	2005	2006	2007	2008	2009	2010	2011	2012	2013
0-4 months	2	6	2	3	5	5	3	1	1	5	2	1	1	1	0
4-6 months	1	4	1	2	3	2	3	0	4	5	3	0	2	1	1
6-8 months	1	3	2	0	2	3	1	0	2	0	3	1	0	1	1
8-10 months	3	0	2	4	1	1	3	2	0	1	2	1	1	2	0
10-12 months	2	2	6	2	1	1	2	1	2	2	0	1	1	0	0
12 months +	15	15	15	16	7	8	16	11	19	13	11	7	9	9	8
Total	24	30	28	27	19	20	28	15	28	26	21	11	14	14	10

TABLE 14: DURATION OF APPROVAL PROCESS 1999-2013 (No.s of approvals) - CRUSHED ROCK

Crushed Rock	1999	2000	2001	2002	2003	2004	2005	2006	2007	2008	2009	2010	2011	2012	2013
0-4 months	1	0	0	1	1	0	2	2	2	1	0	0	1	5	2
4-6 months	2	0	1	4	0	0	1	1	1	1	0	0	0	0	0
6-8 months	0	1	1	0	0	1	0	1	1	0	1	0	0	1	1
8-10 months	0	1	2	1	0	0	0	1	0	0	0	0	1	0	0
10-12 months	1	0	0	1	1	0	0	1	0	0	0	0	0	0	0
12 months +	3	10	6	10	2	2	7	1	4	7	2	4	9	10	5
Total	7	12	10	17	4	3	10	7	8	9	3	4	11	16	8

TABLE 15: ANNUAL AVERAGE DURATION OF APPROVAL PROCESS 1999-2013 - SAND AND GRAVEL (MONTHS)

Sand and Gravel	1999	2000	2001	2002	2003	2004	2005	2006	2007	2008	2009	2010	2011	2012	2013
Pre-App Consultation	10	11	9	8	7	8	8	8	10	17	13	12	13	0	18
Determination Period	21	21	20	19	17	14	23	27	23	17	23	16	25	41	31
Average Total*	31	32	29	27	24	22	31	35	33	34	36	28	38	41	49

TABLE 16: ANNUAL AVERAGE DURATION OF APPROVAL PROCESS 1999-2013 - CRUSHED ROCK (MONTHS)

Crushed Rock	1999	2000	2001	2002	2003	2004	2005	2006	2007	2008	2009	2010	2011	2012	2013
Pre-App Consultation	12	14	13	11	14	16	10	6	9	23	14	10	8	12	14
Determination Period	11	26	20	24	19	24	21	12	13	31	18	26	22	26	20
Average Total*	23	40	33	35	33	40	31	18	22	54	32	36	30	38	34

*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) 1999-2013 (see Chart 4)

All Aggregates	1999	2000	2001	2002	2003	2004	2005	2006	2007	2008	2009	2010	2011	2012	2013
0-4 months	5	5	4	4	4	4	4	4	4	4	4	4	4	4	4
5-12 months	15	14	13	14	13	12	12	11	11	10	10	9	8	7	7
12 months +	25	25	25	24	23	21	22	20	20	19	18	17	17	16	16
Total	45	43	43	42	40	38	38	35	35	33	33	30	29	27	27

TABLE 18: RUNNING AVERAGE TIME FROM PRE-APPLICATION TO APPROVAL (MONTHS) 1999-2013 (see Chart 5)

All Aggregates	1999	2000	2001	2002	2003	2004	2005	2006	2007	2008	2009	2010	2011	2012	2013
Average Time S&G	31	32	29	27	24	22	31	35	33	34	36	28	38	41	49
Average Time CR	23	40	33	35	33	40	31	18	22	54	32	36	30	38	34
Running Average S&G	27	28	28	28	28	27	27	27	29	30	30	30	31	32	35
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) 1999-2013**

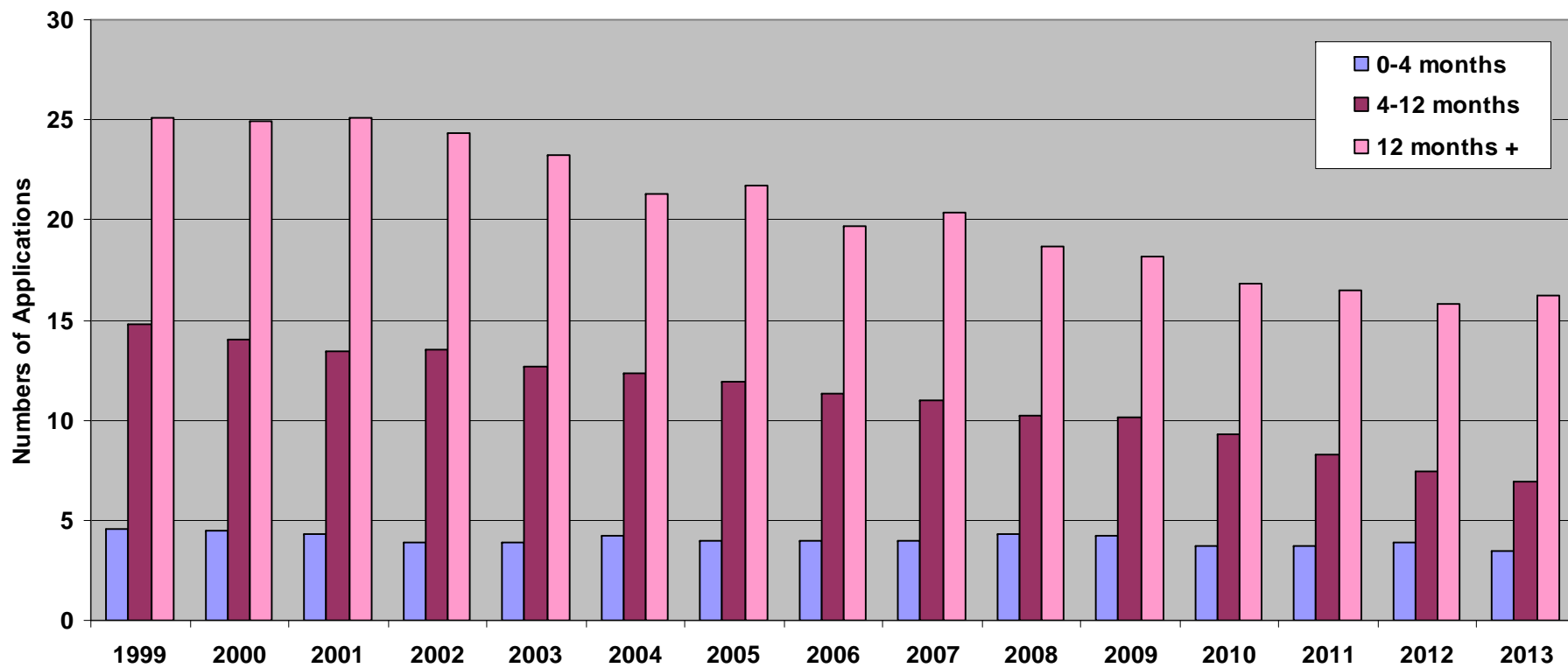


Chart 5: Average Times From Pre-application Consultations to Approval For All Aggregates 1999-2013

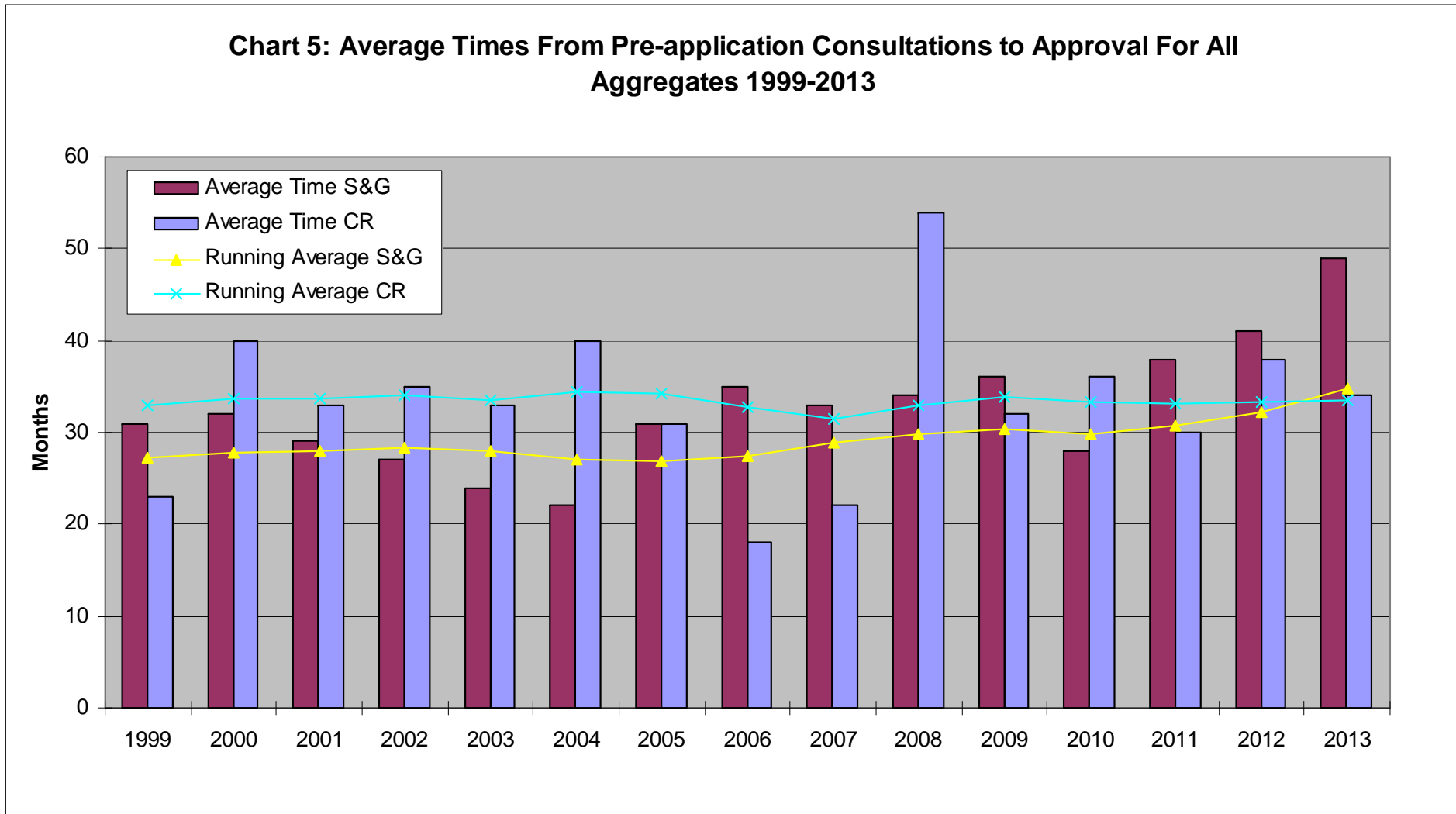
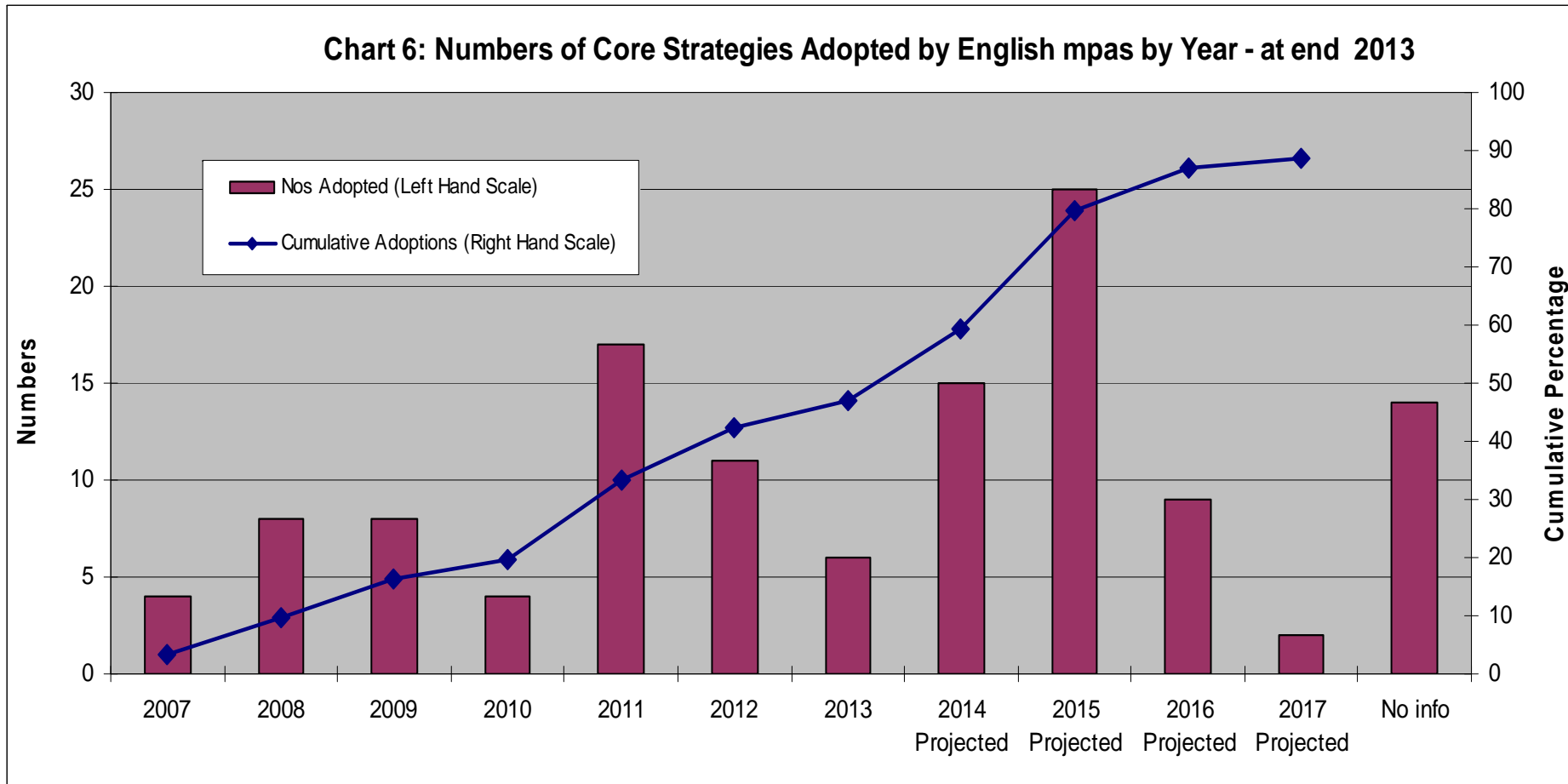


Chart 5 takes data from Table 18 to show that the long term average length of time applications are taking to get through the system to approval has changed over 15 years, with crushed rock consistently remaining around 33-34 months over the 15 year period, whilst sand and gravel applications have increased significantly since 2007 from around 27 months to 35 months exceeding for the first time the long term average for crushed rock. This is significant because sand gravel proposals have traditionally been seen as less

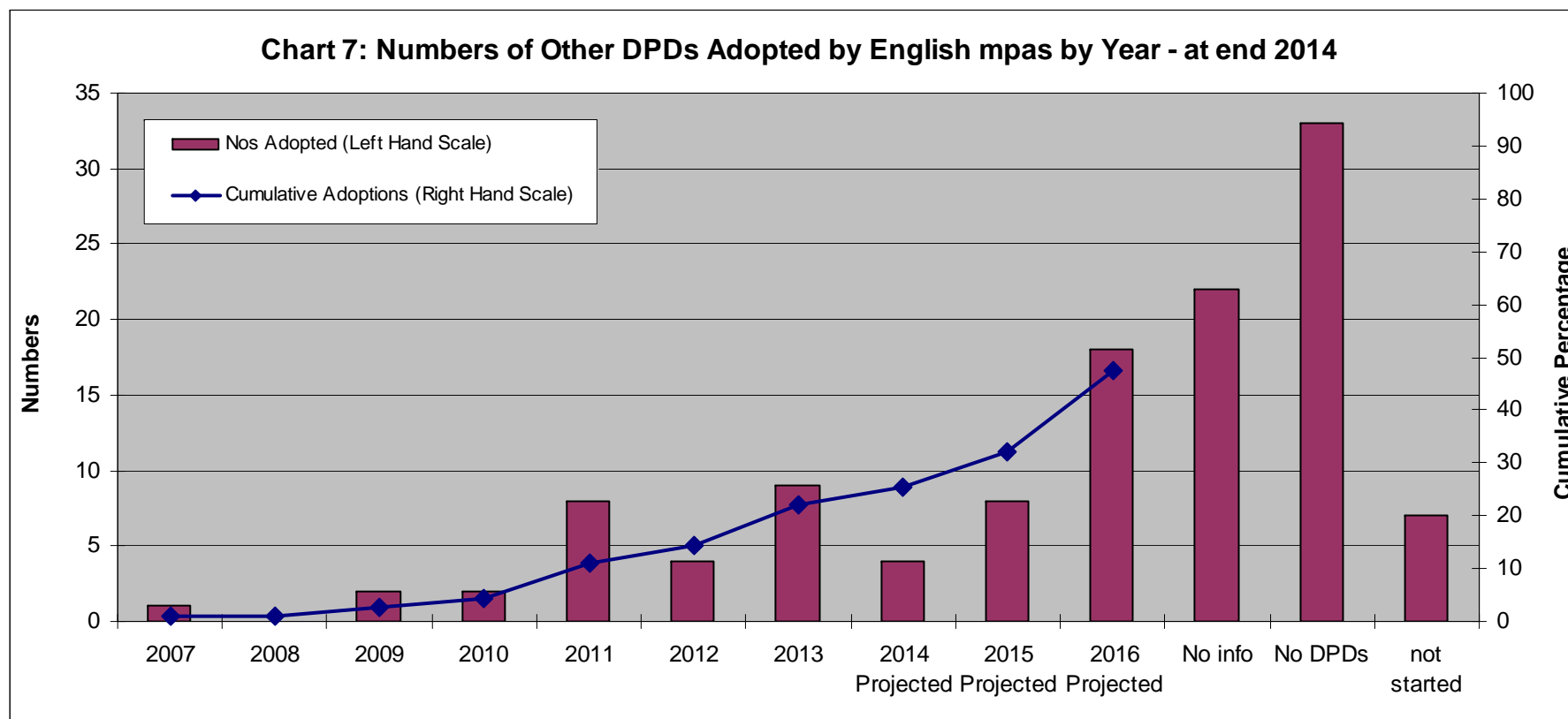
complicated and therefore easier to process than crushed rock applications. Current trends indicate that there is little difference between the two types of proposals in terms of complexity and process time in the future.

SECTION FIVE – DEVELOPMENT PLAN PROGRESS

The MPA monitors 123 mineral planning authorities (mpas) in England and 25 in 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 10 years after the institution of spatial planning and portfolio style plans in England only 47% of relevant plans were adopted. Some authorities have barely started the process and 42 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. 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 22% of such documents were adopted by the end of 2013 and by 2016 this will rise to only 56%. Of the remainder in 22 cases there is no information in Local Development Schemes about authorities' intentions regarding minerals, whilst a further 33 have no intention of producing other documents; all matters regarding minerals to be subsumed within one Local Plan. Seven mpas have not started such documents yet. As a result, there are only 24 complete mineral plan frameworks and only 10 of those are significant aggregates producers.



In Wales the situation is much clearer. Of the 25 unitary authorities in the principality, 56% have been adopted and by the end of 2013 80% had reached the Deposit stage.

SECTION SIX – ANALYSIS OF ALL APPROVALS 2006-2013

This year the survey analysed all approvals in the eight year period between 2006 and 2013 for a more detailed look at a larger sample. This comprised a sample of 175 planning permissions and over a Billion tonnes of material in all parts of the United Kingdom.

TABLE 19: METRICS FOR MINERAL PLANNING AUTHORITY APPROVALS 2006-2013

All Aggregates	Total Approved	Tonnage Approved	Area (Ha) Approved	% Approved	% Tonnage Approved	% Area (Ha) Approved	Average Tonnage Approved	Average Yield per Ha Approved
Crushed Rock Extensions	52	937,142,000	1,780.5	29.7	83.4	23.3	18,022,000	526,331
Crushed Rock New Sites	0	0	0.0	0.0	0.0	0.0	N/A	0.0
Sand & Gravel Extensions	107	158,008,000	5,173.4	61.1	14.1	67.7	1,477,000	30,542
Sand & Gravel New Sites	16	28,450,000	683.4	9.1	2.5	8.9	1,778,000	41,633
Total	175	1,123,600,000	7,637.3	100.0	100.0	100.0	6,421,000	147,121

TABLE 20A: LOCAL PLAN STATUS OF APPROVALS 2006 - 2013

Allocation in a Development Plan	Numbers Approved	% Numbers Approved
Allocated	77	44.0
Not Allocated	92	52.6
Not Stated	6	3.4
Total	175	100.0

TABLE 20B: OFFICER RECOMMENDATION OF APPROVALS 2006 - 2013

Officer Recommendation	Numbers Approved	% Numbers Approved
Approval	158	90.3
Not Stated	16	9.1
Called In	1	0.6
Total	175	100.0

TABLE 21: REGIONAL ANALYSIS APPROVALS ALL AGGREGATES 2006-2013

Region	Tonnage Approved	Numbers Approved	% Tonnes Approved	% Numbers Approved
East England	43,650,000	23	3.9	13.1
East Midlands	168,048,000	27	15.0	15.4
London	820,000	2	0.1	1.1
North East	13,135,000	9	1.2	5.1
North West	19,496,000	7	1.7	4.0
South East	50,786,000	30	4.5	17.1
South West	135,920,000	15	12.1	8.6
West Midlands	83,900,000	15	7.5	8.6
Yorkshire Humber	34,719,000	10	3.1	5.7
North Wales	20,966,000	4	1.9	2.3
South Wales	25,490,000	8	2.3	4.6
Scotland	506,070,000	21	45.0	12.0
Northern Ireland	19,300,000	3	1.7	1.7
Channel Islands	1,300,000	1	0.1	0.6
Total	1,123,600,000	175	100.0	100.0

TABLE 22: NATIONAL ANALYSIS APPROVALS ALL AGGREGATES 2006-2013

Country	Tonnage Approved	Numbers Approved	% Tonnes Approved	% Numbers Approved
England	550,474,000	138	49.0	78.9
Wales	46,456,000	12	4.1	6.9
Scotland	506,070,000	21	45.0	12.0
Northern Ireland	19,300,000	3	1.7	1.7
Channel Islands	1,300,000	1	0.1	0.6
Total	1,123,600,000	175	100.0	100.0

TABLE 23: ANALYSIS BY YEAR APPROVED ALL AGGREGATES 2006-2013

Year	Tonnage Approved	Numbers Approved	% Tonnage Approved	% Numbers Approved
2006	36,216,000	21	3.2	12.0
2007	479,711,000	32	42.7	18.3
2008	81,774,000	29	7.3	16.6
2009	27,118,000	21	2.4	12.0
2010	56,168,000	15	5.0	8.6
2011	229,129,000	25	20.4	14.3
2012	145,833,000	14	13.0	8.0
2013	67,651,000	18	6.0	10.3
Total	1,123,600,000	175	100.0	100.0

TABLE 24: AVERAGE TIME TO APPROVAL ALL AGGREGATES 2006-2013

Average Periods (months)	Submission – Registration	Registration - Determination	Determination - Issued	Submission- Issued	Pre-application- Issued
Crushed Rock Extensions	0.5	16.5	5.1	22.2	24.4
Crushed Rock New Sites	0.0	0.0	0.0	0.0	0.0
Sand & Gravel Extensions	0.8	16.6	7.0	24.4	24.7
Sand & Gravel New Sites	0.4	21.0	8.5	29.8	30.0
All Permissions	0.7	17.0	6.6	24.3	25.1

TABLE 25: REPLENISHMENT RATES 2006-2013

All Aggregates	Tonnage Permitted	MPA Output (Tonnes)	Replenishment Rate
Crushed Rock Extensions	937,142,000	729,000,000	128.6
Crushed Rock New Sites	0	N/A	N/A
Sand & Gravel Extensions	158,008,000	388,000,000	48.1
Sand & Gravel New Sites	28,450,000	N/A	N/A
Total	1,123,600,000	1,117,000,000	100.6

Of the 175 permissions granted between 2006 and 2013 30% were for crushed rock and 70% for sand and gravel (Table 19). Of the latter there were 16 new sand and gravel sites which mean that extensions represent 90% of all approvals (Table 19). There were no new crushed rock sites in the period; indeed these are very rare. There have probably only been a handful of new crushed rock sites permitted since the inception of the planning acts in 1947.

The tonnage permitted was over 1.1 Billion tonnes, 83% of which was for crushed rock (Table 19). These figures are heavily influenced by a few permissions; 708 Million tonnes (75% of crushed rock tonnage) was permitted at just four sites (Glensanda, Torr, Bardon Hill & Duntilland). All permissions covered an area of 7,637 ha, 77% of which was in sand and gravel sites (Table 19). The average tonnage was over 18 Million tonnes for crushed rock sites, and between 1.4 and 1.7 Million tonnes for sand and gravel approvals (Table 19). In addition, the average yield per ha of crushed rock permissions at over 500,000 tonnes per ha was an order of magnitude higher than the yield per ha from sand and gravel sites (Table 19). In practice, there is a wide variation in yields from extensions to crushed rock sites reflecting their geology and what is intended to be achieved. Thus gross yields varied from 5 Mt per ha in Scotland to 7,000 tonnes per ha in the Midlands. In contrast, new sand and gravel sites yielded mineral at a rate of about 40,000 tonnes per ha, and for extensions about 31,000 tonnes per ha (Table 19). This is significantly lower than might be expected and is probably a reflection of the additional land which is required in sand and gravel sites to accommodate environmental mitigation and restoration objectives. Nevertheless, these figures confirm that it is much more efficient to extract from hard rock sites in terms of yield per ha and areal coverage, although sand and gravel will still be needed to maintain sustainable mineral supplies when rock is unavailable or can only be sourced at a distance.

Approvals continue to demonstrate the parlous state of development planning, particularly in England. Only 44% of approvals were allocated sites despite having a plan-led system (Table 20A). However, over 90% of applications attracted a recommendation from officers of approval, which reflects the care with which sites and proposals are chosen and applications put together to be acceptable environmentally (Table 20B).

A regional analysis shows that Scotland accounted for 45% of approved tonnage which reflects the size of the crushed rock permissions granted; a trend which is also evident in the tonnages granted for the South West and the East Midlands (Table 21). However, in terms of industry activity measured by numbers of approvals the East of England, South East and East Midlands represent the centres of market activity. In particular, the South East with 30 approvals and over 50 Million tonnes of reserves permitted still represents a vitally important market despite the challenges of declining resources and the difficulties of gaining planning permission (Table 21). The national analysis mirrors the regional picture with Scotland and England taking the lion's share of permitted reserves (Table 22).

The analysis by year shows spikes of permitted reserves in 2007, 2011 & 2012, and particular lows in 2006 and 2009. If the large one-off permissions are excluded there is a steady stream of applications coming to determination each year which shows signs of a long term decline from around 30 per year to 20 per year (Table 23).

Table 24 shows the time to determination of all approvals. There was a marked difference between the time that extensions took to process compared with new sites and not much difference between crushed rock and the majority of sand and gravel applications. New sand and gravel sites took around 30 months to consent from pre-application discussion which probably reflects the often higher number of objections to new sites. This figure is in considerable excess of the statutory timescale for major applications subject to an EIA which is 16 weeks (4 months).

During the eight year period the output from member sites was 99% of the mineral permitted and so in total there would appear to have been parity in replenishment (Table 25). However, this masked the fact that sand and gravel replenishment continues to be at levels of less than half of what is extracted (Table 25). This probably reflects the fact that the industry is finding it difficult to identify and pursue sites which will be acceptable to the planning system, and in an increasing number of locations, to overcome resource limitations which in some parts of the country are becoming acute