BLACK COUNTRY CORE STRATEGY

INDEPENDENT EXAMINATION

MINERALS MONITORING UPDATE - JUNE 2010

Provisional annual monitoring data for the year 2009/10 (1 April 2009 – 31 March 2010) is set out in the following data tables.

Core Output Indicator M1 (COI M1):
Production of Primary Land Won Aggregates by Mineral Planning Authority

Table M1 below summarises primary land won sand and gravel sales in the West Midlands County during 2008, the latest year for which monitoring data is available. It is not possible to provide data for Walsall/ the Black Country as there are only two production sites, so the data is regarded as commercially sensitive.

Table M1a: Production of Primary Land Won Aggregates in the West Midlands County: Aggregate Sales 2008 by Aggregate Type (tonnes)

Crushed Rock Apportionment	Crushed Rock Sales	Sand & Gravel Apportionment	Sand & Gravel Sales	Total Sales
N/A	0	506,000	500,000	500,000

Source: Provisional data for 2008 from WMRAWP annual survey (2008 Annual Monitoring Report forthcoming). Data relates to calendar year Jan-Dec 2008

Notes: Data covers calendar year, 1 January – 31 December 2008. Crushed rock apportionment for the West Midlands County ceased to apply after 2005

Table M1b below summarises the latest information on the sand and gravel landbank for the West Midlands County, which is the position @ 31 December 2008.

Table M1ba: West Midlands County: Landbank of Permitted Sand and Gravel Reserves @ 31 December 2008

Permitted Reserves Required for 7-year Landbank (tonnes)	Landbank - Permitted Reserves @ 31 December (tonnes)	Landbank Requirement (years)	Landbank - Supply @ 31 December (years)
3,542,000	5,210,000	7.00	10.29

Source: Provisional data for 2008 from WMRAWP annual survey (2008 Annual Monitoring Report forthcoming).

Note: Increase in permitted reserves since 2007 is as a result of a new permission in Solihull; there has been no increase in permitted reserves in Walsall.

Corresponding data for COI M1 in previous years can be found in Walsall's Annual Monitoring Reports 2005 – 2009 and in RAWP Annual Monitoring Reports 1997 - 2007. The Black Country Core Strategy Minerals Background Paper 2 (Revised) Appendices (February 2010) also summarises annual production in the West Midlands County and sand and gravel landbanks 1997 - 2007.

Core Output Indicator M2 (COI M2):
Production of Secondary and Recycled Aggregates by Mineral Planning Authority

Secondary Aggregates

There are no active quarries in the Black Country which are producing aggregates as by-product materials.

Recycled Aggregates

There are a number of **recycled aggregate production facilities** in the Black Country which are producing aggregates from re-used, recovered or recycled waste materials. Table M2a below lists known facilities operating @ April 2010.

Table M2a: Recycled Aggregate Production Sites in the Black Country @ April 2010

Site Name	Operator	Site Location	MPA	Licensed Waste Management Facility?*	Core Strategy Mineral Infrastructure Site Ref	Core Strategy Strategic Waste Site Ref
Bace Groundworks	Bace Groundworks	Aldridge	Walsall	Y	MI1	WSWa1
Branton Hill Quarry	Bliss Aggregates.com Ltd	Aldridge	Walsall	Y	MI2	WSWa2
Dismantling and Engineering Services	Dismantling and Engineering Services Ltd	Willenhall	Wolverhampton		MI3	WSWo4
Ettingshall Asphalt Plant/ Tarmac Recycling	Tarmac Recycling Ltd	Ettingshall	Wolverhampton		MI5	WSWo5
Glenside Recycling	Glenside Recycling	Smethwick	Sandwell		MI6	WSS10
McAuliffe Civil Engineering	Stichacre Ltd	Bilston	Wolverhampton		N/A - at risk	N/A - at risk
Bescot Sidings	Network Rail	Bescot	Sandwell	Y	MI7	WSS1
Tarmac Bescot Depot	Tarmac Recycling Ltd	Bescot	Sandwell	N	MI8	WSS2
Wednesbury Asphalt Plant	Midland Quarry Products Ltd	Rowley Regis	Sandwell	N	MI10	WSS19

* Recorded as a licensed facility on Waste Data Interrogator 2008. N.B. Waste management licences/ permits may relate to other waste management operations, and do not necessarily relate to facilities involved in recycling of CD&EW into aggregate.

We only have limited information on production of recycled aggregates at these facilities. Returns made in response to the 2008 RAWP annual survey indicated that sites in Wolverhampton produced more than 100,000 tonnes of recycled aggregate in 2008. No information is available on sites in Sandwell and Walsall from this survey, as no returns were made. However, if they were producing similar amounts, annual production of recycled aggregate at specific production sites in the Black Country could be as high as 300,000 tonnes per annum.

Inputs and outputs of CD&EW and mineral wastes at licensed waste management facilities also give some indication of the amount of material potentially available for recycling into aggregate. Data for the calendar year 2008 is set out in Table M2b below. However, it should be stressed that not all of this material can, or will be, recycled.

Table M2b: Inputs/ Outputs of CD&EW and Mineral Wastes at Licensed Waste Management Facilities in the Black Country 2008

	Tonnages of CD&EW and Mineral Wastes									
	Dudley		Sandwell		Walsall		Wolverhampton		Black Country Total	
Facility Type	Inputs	Outputs	Inputs	Outputs	Inputs	Outputs	Inputs	Outputs	Inputs	Outputs
Landfill Sites	59,071	0	36,813	0	212,343	28,184	0	0	308,227	28,184
Transfer Facilities	73,479	56,255	208,220	201,148	51,268	53,462	73,904	72,968	406,871	383,833
Recovery/ Treatment	0	0	1,161	26,732	535	86	25,151	10,418	26,847	37,236
TOTAL	**132,550**	**56,255**	**246,194**	**227,880**	**264,146**	**81,732**	**99,055**	**83,386**	**741,945**	**449,253**

Source: Environment Agency Waste Data Interrogator 2008

Note: Data covers the calendar year 1 January – 31 December 2008. Includes wastes in the following SOC2 Categories: Construction and demolition wastes, naturally occurring minerals, various mineral wastes.

On-site recycling of waste on development sites is also likely to be a significant source of recycled aggregate, but we still have no information on production from this source other than the findings of the national Capita Symonds surveys in 2001, 2003 and 2005 which are summarised in the Minerals Background Paper 2 (Revised) Appendices (February 2008), Appendix 1.

Local Output Indicator – Supply of Clay to Brickworks

Since 2007 Dudley MBC and Walsall Council have been monitoring the production and supply of Etruria Marl through annual updates of information obtained from quarry operators and brick manufacturers. This has been done using a classification method agreed with the brick manufacturers and the British Ceramic Confederation. Trend data for 2008 – 2010 is summarised in Table M3a below.

Table M3a: Supply of Etruria Marl to Black Country Brickworks 2008 - 2010

Year	Total Number of Brick & Tile Works	Number of Operational Works	Number of Works by Supply Category			
			Category 1	Category 2	Category 3	Category 4
2008	7	7	1	2	1	3
2009	7	5	0	3	1	3
2010	7	5	0	3	1	3

Source: discussions with operators September – December 2007 and annual updates since April 2009

Note: This table reflects the position @ 1 April each year except for 2008, for which data is based on the position @ 31 December 2007

Supply Categories/ Definitions:

Category 1 = 25 years + supply from adjacent/ linked source
Category 2 = 15 – 24 years' supply from adjacent/ linked sources
Category 3 = less than 15 years' supply from adjacent/ linked sources
Category 4 = no adjacent/ linked supplies - supplied entirely by imports or stockpiles
Adjacent/ linked source = clay pit adjacent to works and/ or in the ownership or control of the manufacturer

The 2008 data set was used to produce Table 21 of the Published Core Strategy.

Table M3b below sets out the current supply situation at each works in more detail, updating the information in the Minerals Background Paper 2 to April 2010 (see Appendix 2, Table A2a for details of the situation @ April 2009).

Table M3b: Existing and Potential Supplies of Etruria Marl to Black Country Brickworks 2010 – 2026

Works	MPA for Works	Operator	Main Source of Supply	MPA for Main Source of Supply	Estimated Supply @ April 2010 (years)	Core Strategy Area of Search	Estimated Supply + Further Resources Identified in Areas of Search (years)	Maximum Imports Permitted (%)	Potential Supply from Imports - Subject to Availability (TPA)	Total Req. for Core Strategy 16 Year Supply 2011 - 2026 (tonnes)	Theoretical Shortfall for 16 Year Supply 2011 - 2026 with Maximum Imports (tonnes)	Comments
Aldridge	Walsall	Ibstock	Highfields South (imports)	Walsall	Less than 5 years	MA5: Stubbers Green	Not known	100	Confidential	Confidential	0	Works is not adjacent to a clay pit and relies on imports. Operator has not yet agreed to public disclosure of consumption and supply data.
Atlas	Walsall	Ibstock	Atlas	Walsall	21.0	MA5: Stubbers Green	Confidential	30	Confidential	Confidential	0	Operator has identified potential additional reserves within Area of Search but has not yet agreed to public disclosure of consumption and supply data. An application for an extension to the quarry is anticipated some time during 2010 or 2011.
Cradley	Sandwell	Cradley Special Brick	Relies on imports from outside the Black Country	N/A	0.0	N/A	0.0	100	7,000	119,000	0	Specialist operator producing small quantities of bespoke bricks. Supplies provided by parent company (Hanson) - operator has confirmed this arrangement is satisfactory.
Dreadnought	Dudley	Hinton Perry & Davenhill	Ketley	Dudley	14.0 - 19.0	MA4: Ketley	14.0 - 19.0	100	32,000	512,000	0	The works uses red clays only and has two main sources of supply: Ketley Quarry (comprising 50% extracted clay and 50% previously stockpiled clay) and imports from South Staffordshire. No new sources of supply identified.

Works	MPA for Works	Operator	Main Source of Supply	MPA for Main Source of Supply	Estimated Supply @ April 2010 (years)	Core Strategy Area of Search	Estimated Supply + Further Resources Identified in Areas of Search (years)	Maximum Imports Permitted (%)	Potential Supply from Imports - Subject to Availability (TPA)	Total Req. for Core Strategy 16 Year Supply 2011 - 2026 (tonnes)	Theoretical Shortfall for 16 Year Supply 2011 - 2026 with Maximum Imports (tonnes)	Comments
Sandown	Walsall	Wienerberger	Sandown and Highfields South	Walsall	4.0	MA5: Stubbers Green	7.0	65	110,500	2,720,000	0	Operator has identified additional resources within Area of Search. Planning application for extension to quarry (The Causeway) was submitted in 2009. The operator estimates there was around 4 years' supply remaining at April 2010, assuming low levels of imports. The extension would double the reserve, giving around 7 years' supply assuming low imports. Maximum imports would give around 16 years' supply.
Sedgley	Staffs CC	Wienerberger	Oak Farm	Dudley	24.0	MA3: Himley/ Oak Farm	24.0	100	50,000	850,000	0	Factory is currently mothballed - operator has confirmed supply is adequate, in the event that the factory re-opens at some point in the future.
Stourbridge	Dudley	Ibstock	Himley (imports)	Dudley	Less than 5 years	MA3: Himley/ Oak Farm	Not known	100	Not known	Not known	Not known	Factory is currently mothballed. Works is not adjacent to a clay pit and relies on imports. Operator has identified potential additional reserves within Area of Search. Otherwise no information available.

Residual Supply Requirements for LDFs – Update and Errata

During the gathering of data on brick clay for 2009/10, an error was identified in the supply estimates for Walsall in the Minerals Background Paper 2 (see Minerals Background Paper 2 (Revised) (February 2010), Appendix 2, Table A2c). This was due to accidental double-counting of reserves at one site. A corrected version of Table A2c is set out below, with amended figures highlighted in green. Table M3c which follows updates the position to April 2010.

It should be stressed that the tables below set out the supply requirements for Black Country brick and tile works (including the two factories which are currently mothballed), and estimated reserves available within the Black Country only. They do not include any allowance for importation of clays. Table M3b above shows how much clay each factory may import, subject to availability.

Table A2c (Correction): Residual Etruria Marl Supply Requirements for Dudley and Walsall LDFs @ April 2009

MPA	Total Estimated Annual Supply Requirement (tonnes per annum)	Total Estimated Residual Core Strategy Supply Requirement 2010 - 2026	Total Estimated MPS1 Supply Requirement 2010 - 2035 (25 Year Supply)	Total Estimated Permitted Reserves @ April 2009 (tonnes)	Estimated Resources within Areas of Search (tonnes)	Total Supply Identified in Core Strategy - Permitted Resources + Resources in Areas of Search (tonnes)	Additional Resources Required for Core Strategy Supply 2010 - 2026 (tonnes)	Additional Resources Required for 25-Year Supply 2010 - 2035 (tonnes)
Dudley	82,000	1,400,000	2,100,000	1,600,000	500,000	2,100,000	0	0
Walsall	310,000	5,300,000	7,800,000	3,300,000	1,400,000	4,700,000	600,000	3,100,000

Notes: Figures rounded. Data does not include any allowance for imports and relates only to factories for which we have information (data for Stourbridge Factory in Dudley and Aldridge Factory in Walsall is missing).

Table M3c: Residual Etruria Marl Supply Requirements for Dudley and Walsall LDFs @ April 2010

MPA	Total Estimated Annual Supply Requirement (tonnes per annum)	Total Estimated Residual Core Strategy Supply Requirement 2011 - 2026	Total Estimated MPS1 Supply Requirement 2011 - 2036 (25 Year Supply)	Total Estimated Permitted Reserves @ April 2010 (tonnes)	Estimated Resources within Areas of Search (tonnes)	Total Supply Identified in Core Strategy - Permitted Resources + Resources in Areas of Search (tonnes)	Additional Resources Required for Core Strategy Supply 2011 - 2026 (tonnes)	Additional Resources Required for 25-Year Supply 2011 - 2036 (tonnes)
Dudley	82,000	1,300,000	2,100,000	1,500,000	500,000	2,000,000	0	100,000
Walsall	310,000	5,000,000	7,800,000	3,100,000	1,400,000	4,500,000	500,000	3,300,000

Notes: Figures rounded. Data does not include any allowance for imports and relates only to factories for which we have information (data for Stourbridge Factory in Dudley and Aldridge Factory in Walsall is missing).