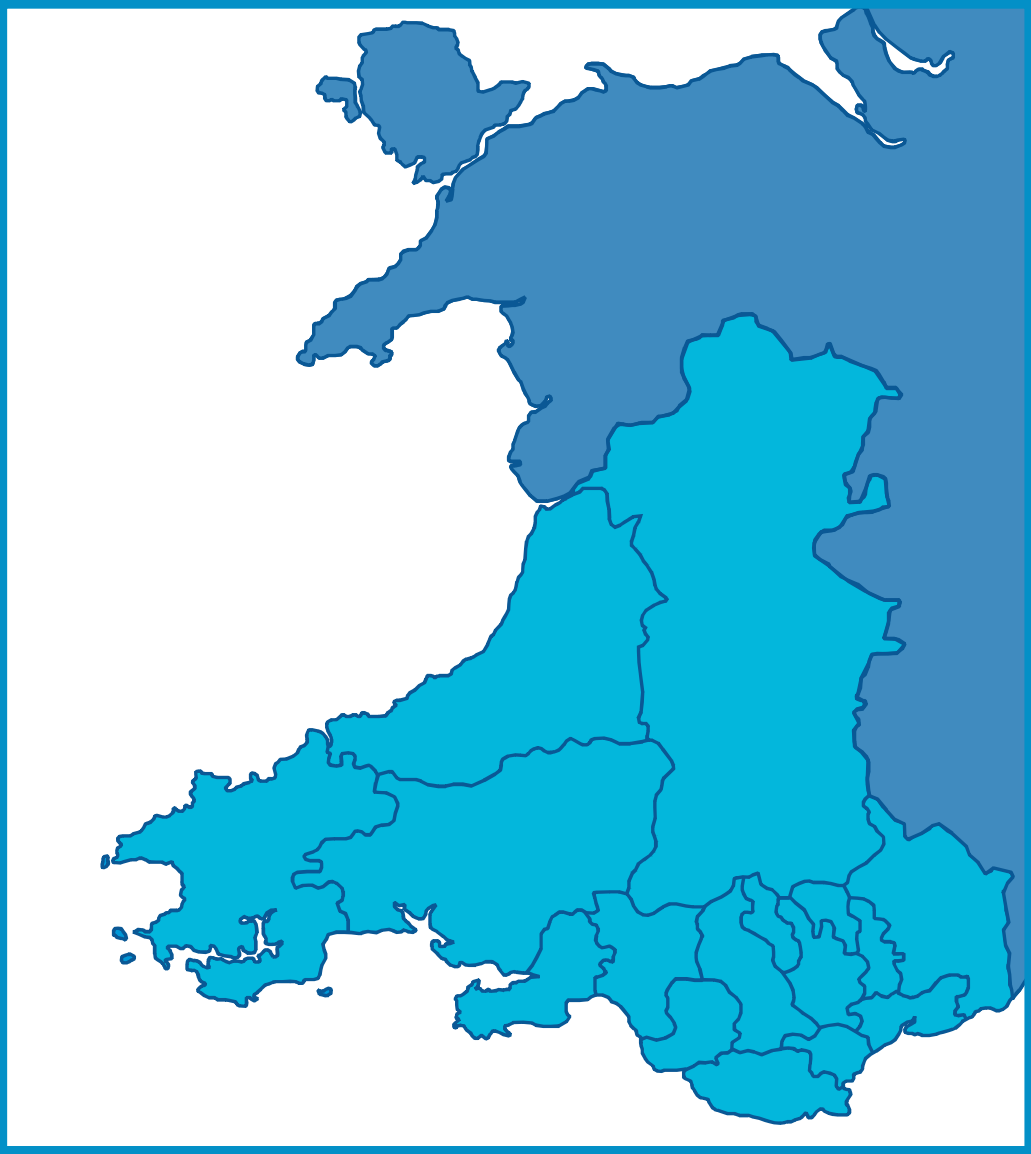

South Wales Regional Aggregates Working Party

Annual Report 2009

This report contains statistics on aggregate sales in the calendar year 2009

The statistics and statements contained in this report are based on information from a large number of sources and are compiled to an appropriate level of accuracy and verification. Readers should use corroborative data before making major decisions based on this information.

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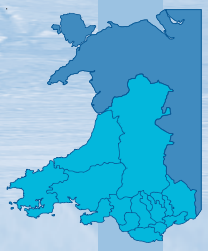

South Wales Regional Aggregates Working Party - Annual Report 2009

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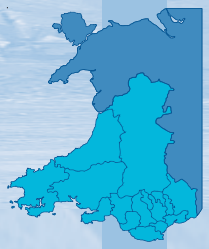
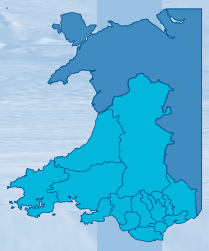


1. INTRODUCTION

1.1. This report has been prepared by the South Wales Regional Aggregate Working Party (SWRAWP) and gives the results of the Annual Survey for the calendar year of 2009 in the South Wales region. Each year, the SWRAWP co-ordinates the aggregate sales information received from all mineral operators via the eighteen mineral planning authorities which make up the South Wales region (see Appendix B). The work of the SWRAWP has been funded by the Welsh Assembly Government (WAG) since April, 2002. A new 4 year contract has just been signed to 2014.

1.2. The collated information in this report is used as a major contribution to the ongoing study of supply and demand patterns, which provides a vital input to the monitoring and review of the Welsh Assembly Governments' supply and demand policy for aggregates which is enshrined in the Minerals Technical Advice Note (MTAN 1). This underpins the management supply of aggregates approach to sustain the economy. Such information is also useful to Mineral Planning Authorities in carrying out their statutory functions in respect of the preparation of local development plans and the determination of planning applications. The information is also made available to the general public and industry, the latter of which use it to plan new developments and investments.

1.3. The MPA (formerly QPA), on behalf of its members, have relaxed the longstanding three company confidentiality rule and indeed are giving further consideration currently to this issue. The BAA have also followed suit but their membership is relatively small. This rule ensured that data would not be published if it related to less than three companies, unless the companies concerned had given written permission otherwise. Nonetheless, as non-MPA members are still protected by the old rule, it has still been necessary to amalgamate a large amount of data to maintain confidentiality. This is particularly so in relation to areas like Carmarthen, Ceredigion and Powys, where there are a significant number of small operators.



2. SOUTH WALES REGIONAL AGGREGATES WORKING PARTY

2.1. The twelve Regional Aggregates Working Parties (RAWPs) in England and Wales provide information and advice to the Department of Community and Local Government and to the First Secretary of the Welsh Assembly Government in the supply of and the demand for, aggregate minerals. The National Co-ordinating Group (NCG) provides a national forum of discussion of work undertaken by the RAWPs.

2.2. The South Wales Regional Aggregates Working Party is a technical working group with membership drawn from officers of the 18 Mineral Planning Authorities, representatives of the Mineral Products Association (MPA - which is the new name for the trade association of the aggregates/cement industry), the British Aggregates Association (BAA), the construction/demolition industry, the DCLG and Welsh Assembly Government, the Crown Estate, the Farming and Rural Conservation Agency, Environment Agency Wales, CCW, National Ash, and the British Geological Survey. A list of current members is shown in Appendix B.

2.3. Two meeting's of the South Wales RAWP were held in 2009. One sub-committee meeting was held to discuss the issue of mineral extraction in the National Parks/ AONB's. No elected Member Forum meetings were held. The RTS was finally issued after a 3 year long process period in October 2008.

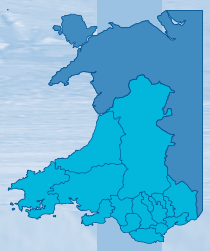
2.4. The Secretary of SWRAWP attended a number of steering group meetings relating to:-

Site waste management plans (EAW);

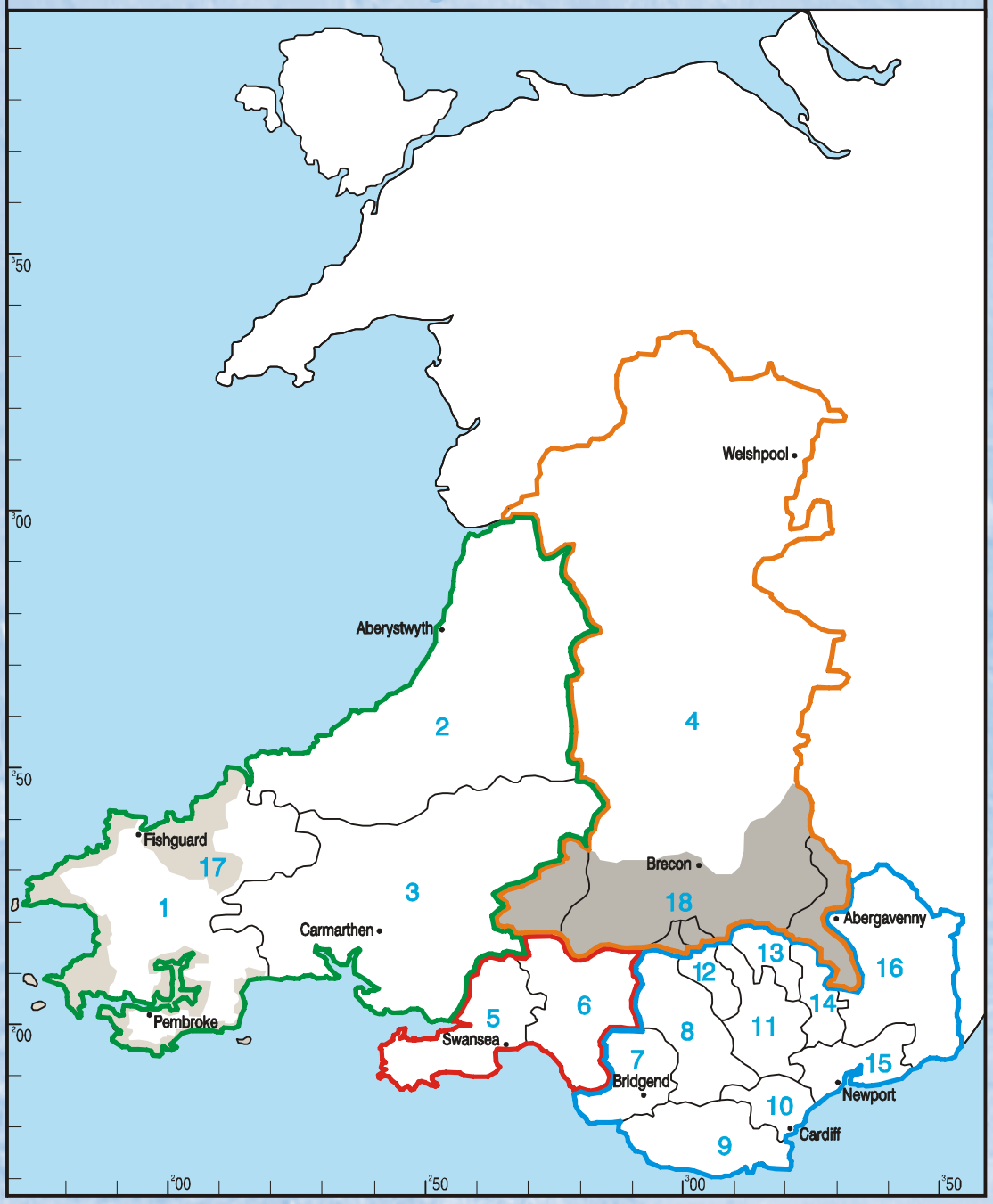
and AM2009.

An informal meeting was held with the MPA to discuss current issues.

Meetings were also held with NWRAWP secretary and WAG to discuss RAWP contract work.



MAP 1
S.W.R.A.W.P. Mineral Planning Authorities



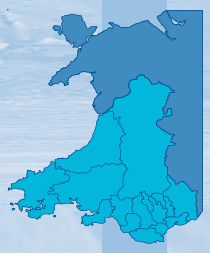
Unitary Authorities

1. Pembrokeshire
2. Ceredigion
3. Carmarthenshire
4. Powys
5. Swansea
6. Neath-Port Talbot
7. Bridgend
8. Rhondda-Cynon-Taff
9. Vale of Glamorgan
10. Cardiff
11. Caerphilly
12. Merthyr Tydfil
13. Blaenau Gwent
14. Torfaen
15. Newport
16. Monmouthshire

Old County Collation Boundaries

- West Glamorgan
- Dyfed
- Powys (incl Brecon Beacons.N.P.)
- Mid & South Glamorgan and Gwent

17. Pembrokeshire Coast National Park
18. Brecon Beacons N.P.



3. CRUSHED ROCK

3.1. The results of the 2009 survey are as follows:-

Table 1
Crushed Rock Sales By End Use (million tonnes) 2009

	Coated Roadstone	Uncoated Roadstone	Concrete Aggregate	Fill/Other Construction Aggregate	Rail Ballast	Total Aggregate [1]	Building Stone	Non Aggregates [2]
Limestone	0.37	0.69	1.21	2.32	-.--*	4.49	0.03	-.--**
Sandstone	7.89		0.26	0.86		2.62	0.02	-.--**
Igneous	0.61					1.02		
Total	**2.54**	**0.95**	**1.47**	**3.18**	**-.--***	**8.13**	**0.05**	**1.71**

[1] Includes unknown end uses. [2] Includes Building Stone.

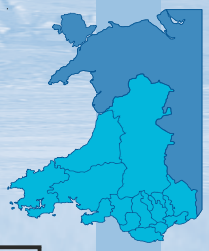
Figures may not balance exactly due to rounding off, and the lack of information regarding the breakdown of end-use.
* Confidential ** Unavailable

Table 2
Crushed Rock Aggregate Sales & Reserves (million tonnes)

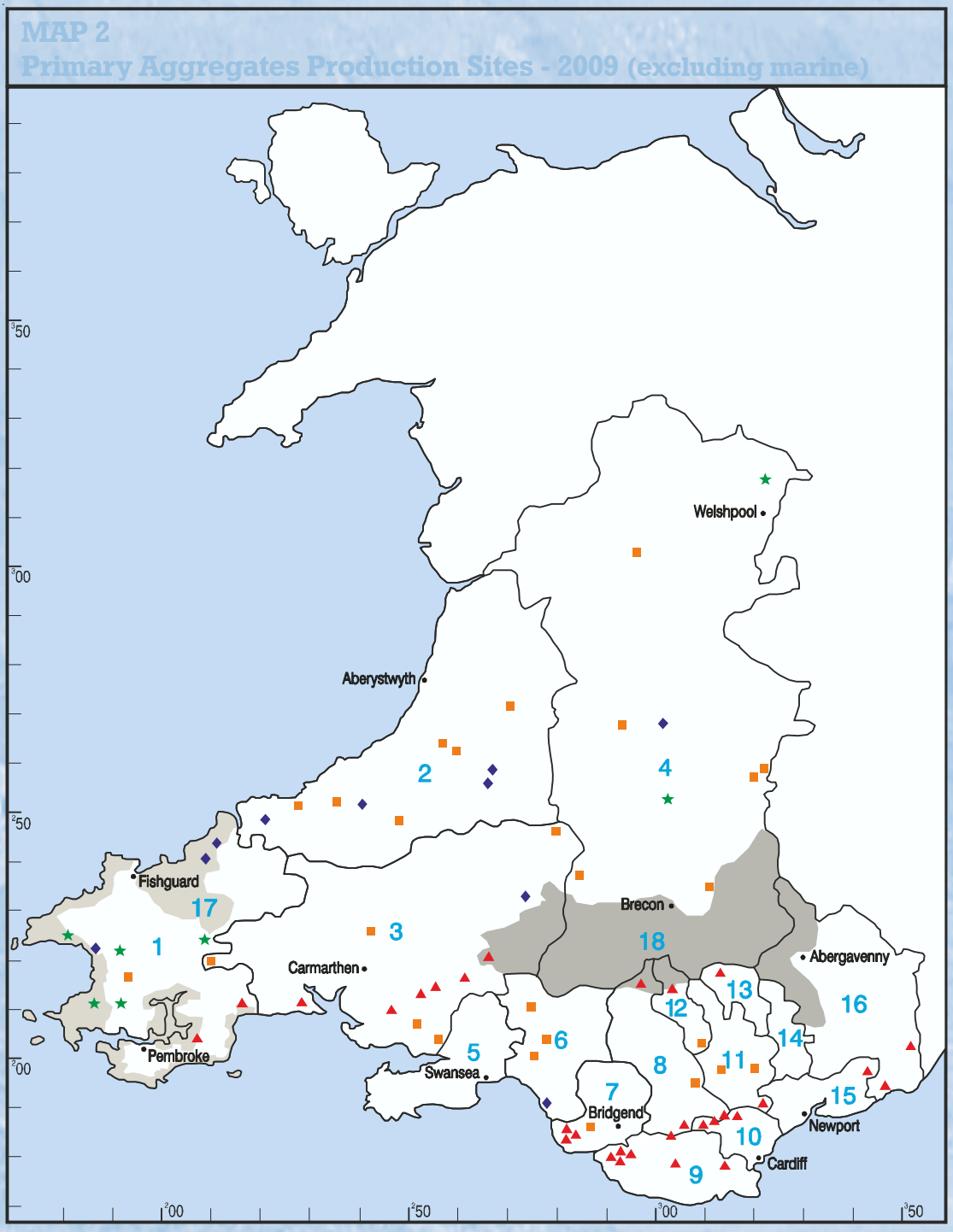
Former County (approx.)	Mineral Planning Authority	Crushed Rock Sales 2007	Crushed Rock Sales 2008	Crushed Rock Sales 2009	Reserves at 31.12.09 [1]	Landbank of [2] Reserves
Powys	Brecon Beacons National Park	3.20	3.90	2.58	180.60	(years) 142
	Powys					
Dyfed	Carmarthenshire	3.27	2.85	2.47	50.70	50
	Ceredigion				13.50	54
	Pembrokeshire County Council				18.00	22
	Pembrokeshire Coast N.P.				7.12	24
West Glamorgan	Neath-Port Talbot				124.05	6
	Swansea					0
Mid & South Glamorgan And Gwent	Blaenau Gwent	1.80	1.32	0.66	105.17	13
	Merthyr Tydfil					279
	Monmouthshire					270
	Newport					0
	Torfaen					0
	Bridgend	6.04	4.60	3.08	214.99	56
	Caerphilly		0.77	0.50	34.10	49
	Cardiff		0.77	0.56	40.80	49
	R.C.T.		0.84	0.75	12.45	15
	Vale of Glamorgan		1.02	0.62	21.22 [1]	17
Total		**12.51**	**10.35**	**8.13**	**519.64** [1]	**1031**

[1] The majority of non-aggregate reserves are located in the Vale of Glamorgan and these have been excluded from reserve figures. In other authorities, aggregate reserve figures may include some non-aggregate reserves. It is important to note that some non-aggregate reserves may contain aggregate reserves and vice versa, and the end-use changes with the market.

[2] Crushed rock landbanks are determined using the average production figures over the last 3 years 2007-2009, and dividing the reserves by the annual average production.



MAP 2
Primary Aggregates Production Sites - 2009 (excluding marine)



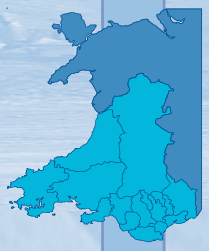
Unitary Authorities

1. Pembrokeshire
2. Ceredigion
3. Carmarthenshire
4. Powys
5. Swansea
6. Neath-Port Talbot
7. Bridgend
8. Rhondda-Cynon-Taff
9. Vale of Glamorgan
10. Cardiff
11. Caerphilly
12. Merthyr Tydfil
13. Blaenant Gwent
14. Torfaen
15. Newport
16. Monmouthshire

Primary Aggregates

- Limestone
- Igneous
- Sandstone (including shale)
- Sand & Gravel

17. Pembrokeshire National Park
18. Brecon Beacons N.P.



LANDBANKS

3.2. A landbank is a stock of planning permissions for the winning and working of minerals. The landbank figures have been calculated according to the method set out in MTAN 1(Wales), except that no allowance has been made for the demand trend i.e. they have been calculated using the average of the last three years production. The RTS confirms the apportionment figures per mineral planning authority for the next 15 years. The permitted reserves are those estimated to be available for the production of saleable aggregates, including low quality fill. Where operators did not provide information on aggregate sales, best estimates have been made from the local knowledge of mineral planning officers and any past returns.

3.3. Caution must be exercised in using these landbank figures. The landbank calculation does not take account of geographical or operational aspects which may restrict the availability of certain types of reserves. Also the reserves in many cases, have been estimated using limited sampling and testing information and the marketing conditions prevailing at the time and may be subject to revision.

3.4. A survey of inactive/dormant sites to ascertain the likelihood of reactivation was carried out in 2005. A number of criteria were used to determine whether or not the sites may usefully be ignored for the purposes of defining an active landbank. The results indicate that there were 128 million tonnes of reserves in this category of which 47 million tonnes (37%) could be considered unlikely to reactivate. These results were incorporated into the RTS process.

3.5. It is important to note that reserves earmarked as being suitable for aggregates may also be suitable for non-aggregates. Many carboniferous limestone hard rock quarries produce significant amounts of rock suitable for both uses and these may change from year to year with market demand. Whilst many quarries may have less than 10% non-aggregates, some may have up to 50%. Reserve figures have also for the majority of cases been based on annual survey returns from operators or in the absence of returns, estimates have been made.

CRUSHED ROCK SALES

3.6. Sales of crushed rock have decreased by 2.22 million tonnes (-21.4%). Limestone sales decreased by 1.50 million tonnes (-21.4%); Sandstone sales decreased by 0.51 million tonnes (-16%); and Igneous sales decreased by 0.21 million tonnes (-17%). Total sales in 2009 amount to 8.13 million tonnes, the smallest sales figure for 6 years. Limestone sales have reduced significantly but still continue to dominate the sales figures accounting for 58% of the market. Sandstone sales account for 30% of the market.

SALES OF ROCK BY END USE

3.7. Coated roadstone accounted for 28% of the market; Uncoated roadstone 13%; Concrete 23% and Fill 15%.

Table 3
Sales of Primary Aggregates by end use

Primary Aggregate	Tonnage	Percentage
Coarse/Fine Concrete Aggregate	2,024,000	22.6
Building/Asphalting Sand	188,000	2.2
Roadstone/Gravel (coated)	2,520,000	28.2
Roadstone (uncoated)	1,119,000	12.5
Other Screened and Graded Aggregates	998,000	11.1
Railway Ballast	30,000	0.3
Armourstone/Gabion Stone	66,000	0.6
Other Construction Uses (including fill)	1,308,000	14.6
Undifferentiated Aggregate Use	690,000	7.9
Total	**8,942,000**	**100.0**

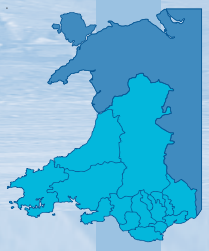
SAND AND GRAVEL BY END USES (LAND-WON)

3.8. The overall sales tonnage has decreased to approximately 0.14 million tonnes from 0.30 million tonnes in 2008. Concreting sand sales have increased to 55,000; sand used for mortar is 40,000; but the overall tonnage is still relatively low. Carmarthenshire and Ceredigion generate the majority of sales.

3.9. It should be noted that the main sources of land won sand and gravel are in West Wales with the main sources being Ceredigion, Carmarthenshire and Pembrokeshire (including the Pembrokeshire Coast National Park).

MARINE SAND AND GRAVEL

3.10. A comparison of the statistics for 2008/2009 indicate there was a 26% decrease in the tonnage of sand and gravel landed in 2009 (from 0.84 million tonnes to 0.62 million tonnes). There were significant decreases in tonnages landed at all ports, except for Burry Port.



4. SAND AND GRAVEL

4.1. The results of the 2009 survey are as follows:-

Table 4
Sand and Gravel (Land Won) Total Sales (million tonnes) 2009

Former County(approx)	Mineral Planning Authority	Land Won Aggregates	Reserves
Dyfed	Carmarthenshire County Council	0.13	2.90
	Ceredigion C. C.		
	Pembrokeshire County Council		
	Pembrokeshire Coast National Park		
West Glamorgan	Neath-Port Talbot County Borough Council	0.01	0.54
Powys	Powys CountyCouncil		
Mid & South Glamorgan And Gwent	Bridgend County Borough Council		
Total		**0.14**	**3.44**

Table 5
Sand and Gravel (Land Won) Sales by end use (million tonnes) 2009

Building/Soft Sand for Coating for Asphalt/Mortar	0.04
Concreting/Sharp Sand	0.05
Gravel - Concrete Aggregates, Other Uses	0.01
As Raised Material for Constructional Fill/Unknown	0.04
Total	**0.14**

Table 6
Port Statistics For Marine Dredged Aggregates 2009
(Source: Crown Estate: Summary of Statistics 2009)

Mineral Planning Authority	Landing Port	2008 Tonnages	2009 Tonnages
Vale of Glamorgan Council	Barry	2,103	0
Neath-Port Talbot County Borough C.	Briton Ferry/Port Talbot	104,850	80,532
Carmarthenshire County Council	Burry Port	86,103	91,451
Cardiff Council	Cardiff Docks	256,991	170,115
Pembrokeshire County Council	Pembroke Docks	42,494	38,413
Newport County Borough Council	Newport	240,233	189,314
Monmouthshire	Newport/Chepstow	[1]	[1]
Swansea City County Council	Swansea	113,684	51,745
Total		**846,458**	**621,570**

[1] No statistics as not within Crown Estate area.

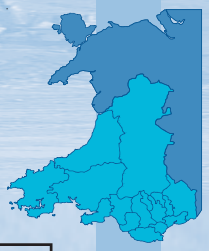


Table 6a
Sand and Gravel (Marine Won) Sales by End Use (million tonnes) 2009

Sand - Asphalt	2,472	(0.4%)
Sand - Mortar (building sand)	169,131	(25%)
Sand - Concreting	474,788	(70%)
Gravel (suitable for concrete aggregate)	4,051	(0.5%)
Sand and Gravel (suitable for construction fill)	23,450	(3.5%)
Undifferentiated Aggregate Use	5,407	(0.7%)
Total	**679,299**	

As expected, sand used for concreting purposes constitutes the dominant end use by a significant margin (70%). Sand used for mortar (building sand) constitutes the next highest use at a level of 25%. The remaining percentage is split into relatively small end uses including asphalt, fill and unknown use.

5. SECONDARY AGGREGATES

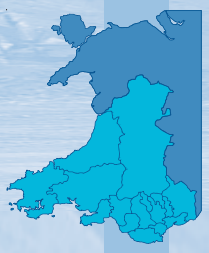
Table 7
Secondary Aggregate Sales (million tonnes) 2009

Mineral Planning Authority	Type	Roadstone Coated/ Uncoated, Concrete Aggregate, Artificial Aggregate	Other Construction Uses (incl. cement)	Total	Reserves at 31.12.09
Newport Neath-Port Talbot Cardiff	Steel/Blast Furnace Slag	0.18	0.85	1.03	16.30
Vale of Glamorgan	PFA/FBA				
Pembrokeshire County	Slate Waste				

1 Reserve figures do not include all waste materials or industrial by-products suitable and available for aggregate uses in 2009 but only statistics on the reserves of material saleable as aggregates in stockpiles and waste tips with planning permission for extraction.

5.1. Responses were received from only six of the fifteen local highway authorities throughout South Wales on the arisings/recycling of road planings. This represents a 43% response rate. 46,705 tonnes of arisings were recorded of which 35,558 tonnes (76%) was recycled. Most of this recycled material was used for low grade end uses such as improvements to roads in rural areas, cycle tracks, sub-base fill, farm lanes, play areas, private roads and footpaths. The majority of the material recycled was asphalt. Very little material was kept in stock (1,150 tonnes). Most authorities achieved a high rate of recycling and none of the arisings went to landfill.

5.2. No reasonable comparison can be made with previous years due to the lack of the responses from all authorities and no clear trends are evident other than no material is landfilled.



6. REGIONAL TECHNICAL STATEMENT (RTS)

6.1. Since the RTS was issued in October, 2008, emerging LDP's from MPA's have been scrutinised to confirm if issues relating to the provision and safeguarding of aggregates have been implemented in accordance with the RTS. Such issues comprise:

(a) the safeguarding of mineral resources including limestone, sandstone, igneous and sand & gravel;
(b) the safeguarding of wharves and rail depots; and
(c) satisfying the regional apportionment for the provision of primary aggregates in each MPA as appropriate.

6.2. Whilst no deposit plans were issued within the calendar year 2008, four authorities have now reached this stage in the early part of 2010. Hence, it was considered appropriate to refer to these as they are the first deposit stage plans to emerge since the issue of the RTS in October, 2008. They are therefore, seen as particularly important to ascertain how the RTS has been interpreted and incorporated into the new plans.

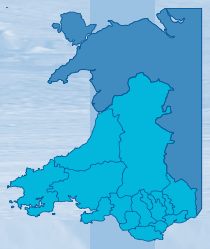
6.3. The four plans to reach deposit plan stage have been prepared by Merthyr Tydfil CBC, Rhondda Cynon Taf CBC, Caerphilly CBC and Pembrokeshire CC. All four plans have attempted to satisfy issue (a) regarding the safeguarding of known mineral resources. Such safeguarding has been defined on the proposals map and/or on a separate constraints map. The latter has been used in an attempt to differentiate between allocations which are seen as specific proposals appropriate for the proposals map and safeguarding areas which are not allocations but may pose a constraint on development depending on the nature of the safeguarding resource. It is noted however, that some authorities have not safeguarded all mineral resouces specified in the RTS for one reason or another. This discrepancy has been identified and the WAG are advising authorities as appropriate.

6.4. Regrettably, the extent of some safeguarding areas are not consistent when they cross unitary authority boundaries. This anomaly has been drawn to the attention of the relevant authorities to ensure consistency of interpretation.

6.5. Whilst there is a requirement to protect rail depots and port wharves in 6.1 (b) above, there are some instances where this has not been carried out. Such facilities are considered sustainable and do need protection although their capacity may be an issue together with their use by other forms of development such as waste.

6.6. With respect to apportionment, none of the four authorities have been required to carry out any apportionment. This is because they already have sufficient permitted reserves to satisfy the minimum 10 year landbank for hard rock during the plan period.

6.7. In summary therefore, the majority of authorities have complied with all of the requirements of the RTS, but some will need to carry out further work on safeguarding to ensure all aspects of the plan are sound.



6.8. In the absence of the new Mineral Map for Wales safeguarding maps, which are due to be issued in early 2011, the resource maps have formed the basis for defining safeguarding areas shown on the LDP Proposals maps.

6.9. Another issue relating to dormant quarries is the need for a clear strategy to deal with this category of quarry. Prohibition orders and/or other orders, need to be considered as part of a positive approach to achieve a meaningful landbank for the region. A list of prohibition orders issued is shown below.

6.10. Some authorities, notably Torfaen, Blaenau Gwent, Newport and Monmouthshire, have joint funded an aggregate safeguarding study for the four authority areas. This approach, is consistent with the collaborative approach advocated by the RTS to achieve the necessary apportionment fot future supplies of aggregate and should be commended as good practice.

6.11. As the review of the RTS is scheduled to be completed by 2013, consideration is being given to what research is necessary to underpin such a review. This may include a re-assessment of the demand for aggregates and the way in which environmental capacity can be assessed as part of a sustainable mineral planning process for the future. A MIRO reserach project, currently ongoing in England only, may shed some light on a different approach to this issue.

6.12. List of Prohibition Orders issued:-

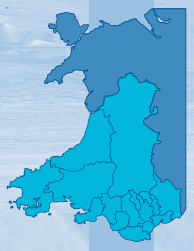
MPA	No.	Name of Site	Reserves (mt)	Operator/ Landowner
Carmarthenshire	6	Capel Graig Castle Cross Hands Hengoed Nantyrhyddod Pleasant View		

6.13. List of dormant* sites (for AS2009)

* Not necessarily as defined by the Planning & Compensation Act 1991, and Environment Act 1995.

MPA	No.	Name of Site	Reserves (mt)	Operator/ Landowner
Blaenau Gwent	0		*	
Brecon Beacons NP	0		*	
Bridgend	1	Stormy Down	0.1	Hobbs Holdings
Caerphilly	1	Cefn Onn	5.2	Wyndham Lewis Trust
Cardiff	0		*	
Carmarthenshire	13	Capel	*	P Jones
		Castle	*	Hobbs Holdings Ltd
		Hengoed	*	Mr Lloyd
		Limestone Hill	*	Mr D R Williams
		Llwynyfran	*	Hobbs Holdings Ltd
		Maesdulais	*	Hobbs Holdings Ltd
		Penybanc	*	Mr S Davies
		Pwllymarch	*	Mr Wilkins
		Ty'r Garn	*	G Morgan
		Cynghordy	*	D Roderick
		Garn	*	Mrs Hibbert
		Cerrig yr Wyn	*	F H Gilman Ltd
		Glantowy	*	D A Lewis
Ceredigion	0			
Merthhyr	0			
Monmouthshire	0			
Neath	0			
Newport	0			
Pembrokeshire NP	1	Penberry	*	Jamieson
Pembrokeshire CC	2	Treffgarne	*	*
		Gilfach	*	Mrs Davies
Powys	3	Rhayader	34.0	Tarmac
		Berwyn Granite	*	Powis Estate
		Garreg	*	Powis Estate
Rhondda Cynon Taff	0			
Swansea	0			
Torfaen	0			
Vale of Glamorgan	4	Argoed Isha	0.5	*
		Cnap Twt	0.0	Duchy of Lancaster
		Ruthin	6.0	Lafarge
		St Andrews	0.7	T J Bowles

* Unknown



7. PRODUCTION OF AGGREGATES IN SOUTH WALES

7.1. Table 8 illustrates the tonnages of aggregates produced in South Wales in the calendar year 2009. The total volume of crushed rock sales has decreased by 2.22 million tonnes (-21.4%). Limestone tonnages have decreased by 1.50 million tonnes (-25%); Sandstone tonnages have decreased by 0.51 million tonnes (-16%); and Igneous tonnages have decreased by 0.21 million tonnes (-17%).

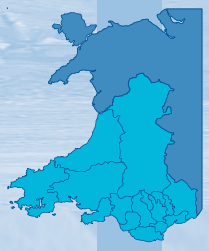
Table 8
Production of Aggregates in South Wales (million tonnes) 2004 - 2008

Type		2005	2006	2007	2008	2009
Limestone		6.13	6.99	7.80	5.99	4.49
Sandstone		3.49	3.35	3.39	3.13	2.62
Igneous		1.23	1.12	1.32	1.23	1.02
Total Crushed Rock		10.85	11.46	12.51	10.35	8.13
Sand & Gravel	**Land Won**	0.44	0.28	0.24	0.30	0.14
	Marine	1.00 [1]	0.95 [1]	1.07 [1]	0.84 [1]	0.62 [1]

[1] Crown Estate-Summary of Statistics. * Estimate.

7.2. Land won sand and gravel does not contribute a significant volume to construction in the region of South Wales, but is important locally in the rural area of West Wales. Production in 2009 totalled approximately 0.14 million tonnes, a decrease of 0.16million tonnes. As the figures for the region as a whole are relatively small they are subject to influence by large local projects.

7.3. Marine-won sand and gravel continues to provide a very important contribution to aggregate sales/production in the region. Overall, tonnages produced have remained fairly consistent over the last 6 years with 846,848 tonnes being dredged in 2008. The 2009 figure of 621,570 represents a 20% decrease in landings (224,133 tonnes) compared with 2008.



8. AGGREGATES - RESERVES

Table 9
Aggregate Reserves: Active, Inactive and Dormant (million tonnes) 2009

MPA	Active	Inactive	Dormant	Total
Brecon Beacons NP	122.01	24.66	41.20	293.47
Powys				
Carmarthenshire	57.93	52.80		
Ceredigion				
Pembrokeshire CC				
Pembrokeshire NP				
Neath - Port Talbot				
Swansea				
Blaenau Gwent	34.40	88.75	7.60	226.17
Merthyr				
Monmouthshire				
Newport				
Torfaen				
Bridgend				
Caerphilly	90.29			
Cardiff				
Rhondda Cynon Taff				
Vale of Glamorgan				
TOTAL	**304.63**	**166.21**	**48.80**	**519.64**

Notes: Some of these reserve figures include some non-aggregate reserves and estimated tonnages.

8.1. The figures shown in this table need to be used with some degree of caution, particularly the dormant sites, as rough estimates have had to be made where accurate reserve assessments are unavailable. Nonetheless, the table does highlight the distribution of reserves throughout the area and the contribution each category makes to the overall landbank.

Table 10
Applications for Quarries Awaiting Decision (AD) and approved in the year 2009

Mineral Planning Authority	Site Name	Type of Developmnet	Decision	Tonnage (mt)
Vale of Glamorgan	(i) Wenvoe (ii) Forest Wood	Lateral extension (Limestone/Dolomite) Lateral extension (Limestone/Dolomite)	AD AD	5.0 3.30
Carmarthenshire	Garn Bica	Lateral extension (Limestone/Dolomite)	Approved	0.08
Neath	Gilfach	Lateral extension (Sandstone/Greywacke)	AD	8.40
Caerphilly	Bryn Quarry, Nelson	Lateral extension (Sandstone/Greywacke extraction)	Approved	0.25
Pembrokeshire CC	(i) Keeston (ii) Tangiers Farm (iii) Bolton Hill	New quarry (Shale) New quarry (Shale) Lateral extension (Limestone/Dolomite)	Approved Approved Approved	0.01 0.10 8.80

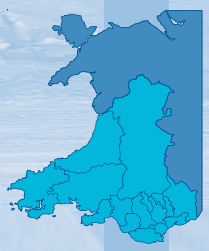
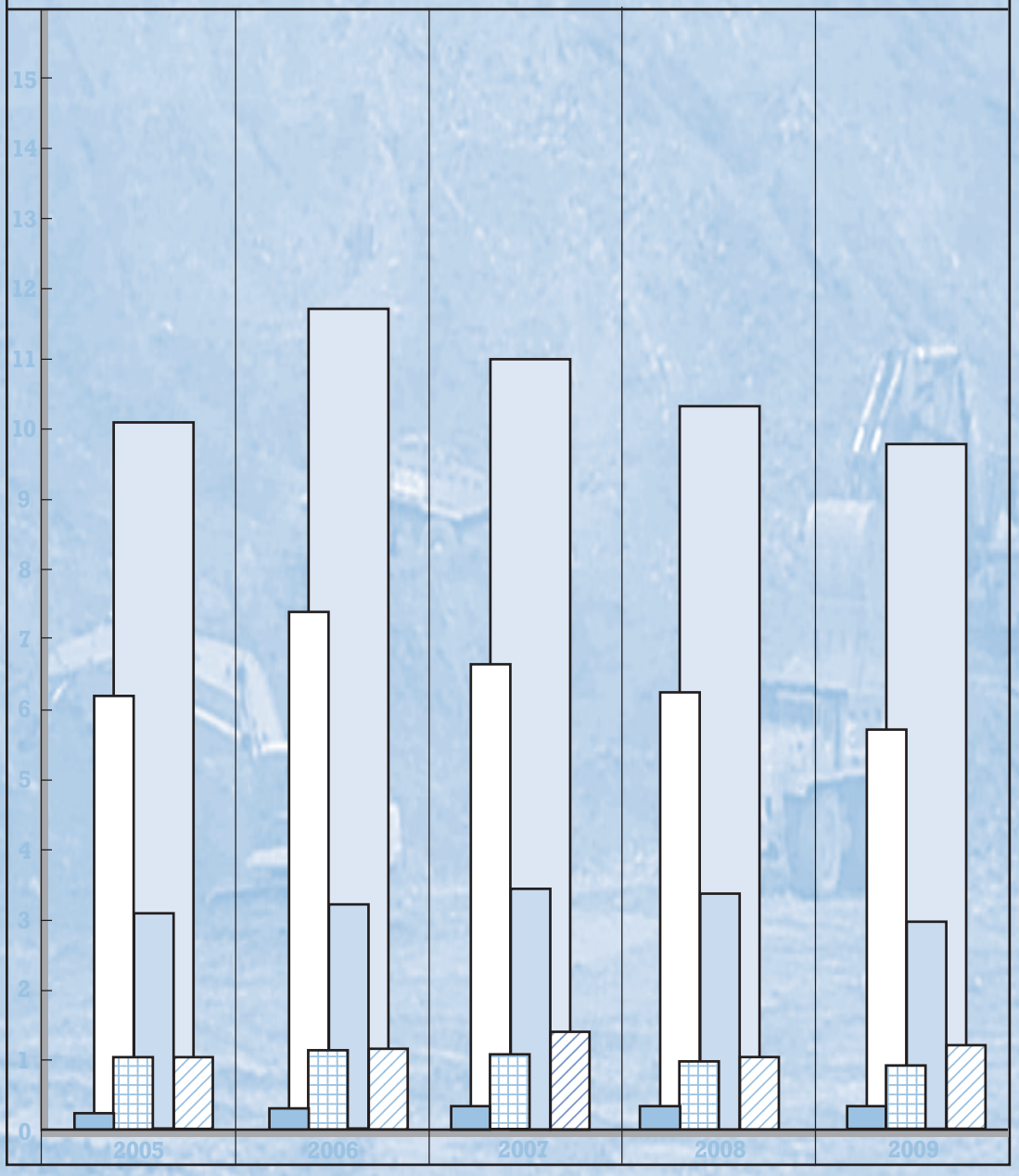
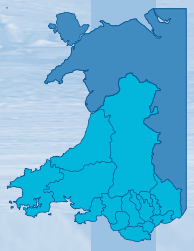


Table 11
Aggregate Sales 2005-2009 (in millions of tonnes)



KEY

- Limestone
- Sandstone
- Igneous
- Total Crushed Rock
- Sand & Gravel - Land won
- Sand & Gravel - Marine (excluding materials for Cardiff Bay Barrage)
- Secondary Aggregates (not shown 1.03mt Approx)



9. Destination, Consumption and Mode of Transport of Aggregates in South Wales

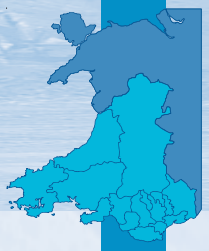
9.1. As expected, the bulk of aggregates produced, 9Mt, was mainly transported by road. The remaining tonnage of 68,000 was transported by rail and 7,000 by water.

The overall volume of aggregates exported from South Wales to other regions was approximately 3Mt. The bulk of this figure consists of crushed rock with a small amount of sand and gravel (24,000). Sandstone constitutes 1.25Mt, igneous 0.69Mt and limestone 52,000 tonnes. The exported aggregate was predominantly sourced from Powys, Neath and Ceredigion. The destination of the exported rock was spread between the West Midlands, the South West and Greater London. It should be noted that approximately 700,000 tonnes of aggregates in the survey was categorised as 'unallocated' (i.e. no destination was given).

Imports to South Wales were relatively small. 155,000 tonnes of sand and gravel was imported from the South West and east/West Midlands and 168,000 tonnes of hard rock was imported from the South West.

The consumption of primary aggregates i.e. those aggregates used in South Wales (including imports but excluding exports) was 6.6Mt. This includes the use of marine sand and gravel.

Since 2005, approximately 32Mt of reserves of hard rock were granted planning permission from 11 sites. Planning permission was also granted for sand and gravel reserves but this figure is confidential as it is from one non MPA site.



APPENDIX A

SITES INCLUDED IN 2009 AGGREGATES MINERAL SURVEY

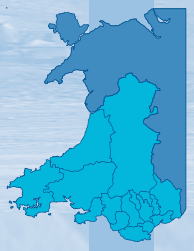


Table 12
Sites Included in 2009 Aggregates Minerals Survey

MPA (Former County)	Site * Inactive: no output ** Estimated data § Dormant	Mineral Type	Operator
Blaenau Gwent C.B.C. (Gwent)	Trefil	Limestone ST120130	Gryphonn Quarries Ltd
Brecon Beacons National Park (Powys, Mid Glam, Dyfed & Gwent)	Ammanford*	Limestone SN654178	Hanson Aggregates
	Penwyllt*	Limestone SN856157	Tarmac Ltd
	Penderyn	Limestone SN956095	Hanson Aggregates
	Blaen Onneu*/**	Limestone SN155170	Hanson Aggregates
Bridgend C.B.C. (Mid Glamorgan)	Cornelly	Limestone SS832800	Cambrian Stone-Tarmac
	Gaens	Limestone SS822805	T S Rees Ltd
	Grove*	Limestone SS822798	Tarmac Ltd
	Cefn Cribbwr*	Sandstone SS874828	T S Rees Ltd
	Stormy Down** §	Limestone SS842805	Hobbs Holdings Ltd
Caerphilly C.B.C. (Gwent & Mid Glam)	Machen	Limestone ST225885	Hanson Aggregates
	Hafod	Sandstone ST224965	Larfarge Aggregates
	Bryn (Gelliargwellt Uchaf)	Sandstone ST126964	A Price & Co
	Cefn Onn*** §	Limestone ST175852	Wyndham Lewis Trust
	Cwm Leyshon***	Limestone ST210868	Hanson Aggregates
Cardiff C.C. (South & Mid Glam)	Blaengwnlais*	Limestone ST146841	Tarmac Ltd
	Creigiau*	Limestone ST087817	Tarmac Ltd
	Cefn Garw*	Limestone ST146841	Mr E Bassett
	Taffs Well	Limestone ST122822	Cemex Ltd
	Ton Mawr*	Limestone ST118829	T S Rees Ltd
	Roath Basin	Marine Sand ST188732	Cemex Ltd
	Brassways Wharf	Marine Sand ST188732	Hanson Aggregates
	Rover Way	Slag/Secondary ST208760	Sims Metal
Carmarthenshire C.C. (Dyfed)	Blaen-y-Pan*	Limestone SN455115	RMC Aggregates S Wales Ltd
	Cilyrychen & Glanwenlais*	Limestone SN613165	Tarmac Ltd
	Coygen**	Limestone SN286092	F H Gilman Ltd
	Crwbin*	Limestone SN476137	RMC Aggregates S Wales Ltd
	Torcoed/Torcoed Fawr	Limestone SN495140	Tarmac Ltd
	Capel* §	Limestone SN560153	P Jones
	Castle* §	Limestone SN534150	Hobbs Holdings Ltd
	Garn Bica***	Limestone SN518146	Mr Jones
	Hengoed*** §	Limestone SN447102	Mr Lloyd
	Limestone Hill*** §	Limestone SN468125	Mr D.R. Williams
	Llwynyfran* §	Limestone SN257216	Hobbs Holdings Ltd
	Maesdulais* §	Limestone SN518145	Hobbs Holdings Ltd
	Penybanc*** §	Limestone SN470130	Mr S Davies
	Pwllymarch* §	Limestone SN259216	Mr Wilkins
	Ty'r Garn*** §	Limestone SN502141	G Morgan
	Ty Hywel**	Sandstone SN598446	Messrs Williams & Sons
	Foundry Road*	Sand & Gravel SN634121	Mr A R Llewellyn
	Coedmoelon	Sandstone SN250212	Mr N Richards
	Capel Graig	Shale SN245202	Msrs KMD + AW Gower

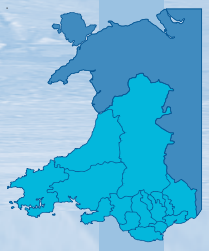


Table 12 (continued)
Sites Included in 2009 Aggregates Minerals Surveys

MPA (Former County)	Site * Inactive: no output ** Estimated data § Dormant	Mineral Type	Operator
Carmarthenshire C.C. (Dyfed)	Pennant	Sandstone SN483069	Phil Bowen
	Alltygam***	Sandstone Silica SN587157	Bardon Aggregates
	Cynghordy***§	Sandstone/Shale SN794403	D Roderick
	Dinas*	Sandstone SN627354	Tarmac Ltd
	Foelfach	Sandstone SN391257	Elvet Jones
	Garn***§	Sandstone SN499136	Mrs Hibbert
	Garn Wen***	Igneous SN167286	F H Gilman Ltd
	Cerrig yr Wyn***§	Igneous SN337160	F H Gilman Ltd
	Llwynjack	Sand & Gravel SN754331	Towy Sand + Gravel Ltd
	Glantowy***§	Sand & Gravel SN746323	D A Lewis
	Burry Port	Marine Sand SN462007	Llanelli Sand Dredging Ltd
Ceredigion C.C. (Dyfed)	Allt goch/Foelbryn**	Sandstone SN490483	F H Gilman Ltd
	Ystrad Meurig	Sandstone SN720695	Hanson Aggregates
	Esgair Newydd	Shale SN284502	I L Jones
	Wstrws*	Shale SN380508	D R Powell
	Cwm Nant Yard*	Shale SN648812	Mr Gouboum
	Cnwcsaeson/Llwynllwd	Sand/Gravel SN200484	Cardigan Sand & Gravel Co Ltd
	Crug yr Eryr	Sand/Gravel SN420503	D R Powell
	Pant*	Sand/Gravel SN662560	D R Davies
	Tylau	Gritstone/Shale SN588606	W J Evans
Merthyr Tydfil C.B.C. (Mid Glam)	Vaynor (part in Brecon Beacons National Park)	Limestone SO039097	Hanson Aggregates
	Gelligaer	Sandstone ST115995	Hanson Aggregates
	Morlais Castle***	Limestone SO055098	None
Monmouthshire C.C. (Gwent)	Ifton	Limestone ST463888	Hanson Aggregates
	Livox*	Limestone ST540975	Hanson Aggregates
	Newport Dock (Newport)	Marine Sand ST320850	Severn Sands Ltd
	Fairfield Wharf (Chepstow)	Marine Sand ST538934	Severn Sands Ltd
Neath-Port Talbot C.C. (West Glam)	Cwm Nant Leici	Sandstone SN728075	Aggregates Industries
	Gilfach	Sandstone SN752999	Cemex
	Gwrhyd Uchaf	Sandstone SN737088	Marshalls
	Port Talbot Steelworks (Margam)	Sand SS780870	Associated British Ports
	Port Talbot & Steelworks	Slag/Secondary SS780870	Tarmac/Cambrian Stone Ltd
	Briton Ferry Riverside Wharf	Marine Sand SS734940	Lafarge
	Bwlch Ffos OCCS	Sandstone SN868024	Tarmac

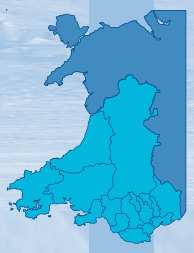
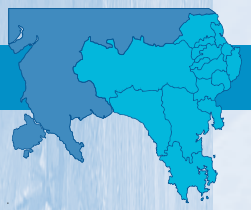


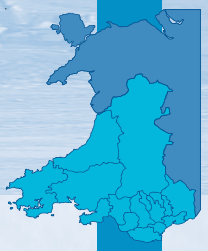
Table 12 (continued)
Sites Included in 2009 Aggregates Minerals Surveys

MPA (Former County)	Site * Inactive: no output ** Estimated data § Dormant	Mineral Type	Operator
Newport C.B.C. (Gwent)	Penhow Quarry*	Limestone ST423913	Hanson Aggregates
	Eastern Wharf	Marine Sand ST322873	Cemex
	Felnex Wharf	Marine Sand SS322873	Hanson Aggregates
	Great Western Wharf	Marine Sand SS322873	United Marine Aggregates
	Llanwern Works	Slag/Secondary ST395861	Cambrian Stone Ltd
	Llanwern	Blast Furnace Slag ST380860	Civil & Marine Slag Cement Ltd
	Maesglas (Mon Bank Sidings)	Railway Ballast ST330186	Tarmac Ltd
	North Park	Marine Sand	Severn Sands
Pembrokeshire Coast National Park (Dyfed)	Bottom Meadow*	Limestone SN037058	E Morgan
	Kiln/Carew	Limestone SN049043	T Scourfield & Sons
	Penberry§	Igneous SM804259	Jamieson
	Rhyndaston	Igneous SM893236	Mason Bros Quarry Products Ltd
	Syke Walwyns Castle*	Igneous/Sandstone SM872106	F H Gilman Ltd
	Pantgwyn**	Sand & Gravel SN124424	L & D Rees
	Trefigin**	Sand & Gravel SN149437	Trefigin Quarries Ltd
	Middle Mill	Igneous	F H Gilman Ltd
Pembrokeshire C. C. (Dyfed)	Cefn	Slate, Stone & Fill SN204428	A D Plant
	Gelli Halog	Limestone SN178197	RMC Materials (UK) Ltd
	Bolton Hill	Igneous SM5201084	F H Gilman Ltd
	Plascwrt Farm**	Igneous SN118274	M Evans
	Slade Hall Farm**	Shale SM932168	Messrs EA & NW Jones
	Wogaston Farm*	Sandstone/Shale SM090010	Mr Woods
	Brawdy Farm	Sand & Gravel SM850240	Mason Bros Quarry Products Ltd
	Glogue	Slate/Secondary SN220328	Mansel Davies & Sons Ltd
	Pembroke Dock Wharf	Marine Sand SM958039	United Marine Aggregates Ltd
	Blaencilgoed	Limestone SM215210	Harries & Sons
	Trefigin*	Sand & Gravel SM150430	Trefigin Quarries Ltd
	Treffgarne§	SN141436	
	Penlan Clunderwen	Sandstone/Shale SN086186	S Griffiths
	Gilfach§	Sandstone/Shale SN130271	Mrs Davies
	Pope Hill (Halfway House)	Shale/Mudstone SM946126	Lawrence Bros
Powys C. C. (Powys)	Cribarth	Sandstone SN953525	Aggregate Industries (UK) Ltd
	Gore	Sandstone SO259592	Tarmac Ltd
	Strinds/Dolyhir	Sandstone/Shale SO242582	Tarmac Ltd
	Tan-y-Foel**	Sandstone SJ014015	H V Bowen & Sons
	Tredomen	Sandstone SO118304	K Jones
	Rhayader*	Sandstone SN198169	Tarmac Ltd
	Criggion	Igneous SJ289142	Hanson Aggregates
	Llanelwedd, Builth	Igneous SO050521	Hanson Aggregates
	Little Wernwilla	Sandstone SO218535	R Mills
	Buttington Brickworks	Sandstone SO326531	Border Hardcore & Rockery Stone
	Borrow Pits	Sandstone/Shale	Alun Griffiths Contractor
	Berwyn Granite§	Igneous	Powis Estate
	Garreg§	Igneous	Powis Estate
	Caerfagu	Sand & Gravel SO045654	Caerfagu Products Ltd

Table 12 (continued)
Sites Included in 2009 Aggregates Minerals Surveys

MPA (Former County)	Site * Inactive: no output ** Estimated data § Dormant	Mineral Type	Operator
Rhondda-Cynon-Taff C.B.C (Mid Glam)	Forest Wood	Limestone ST015798	Hanson Aggregates
	Hendy	Limestone ST054810	Tarmac Ltd
	Craig yr Hesg	Sandstone ST079919	Hanson Aggregates
Swansea City C.C. (West Glam)	Barland***	Limestone SS576895	Cuddy
	Swansea Docks	Marine Sand SS673924	British Dredging Aggregates Ltd
	Swansea Docks	Marine Sand SS 673924	United Marine Aggregates Ltd
Torfaen C.B.C. (Gwent)	---------	----------	---------
Vale of Glamorgan C. (South & Mid Glam)	Aberthaw	Limestone (Lias) ST037672	Lafarge Cement Ltd
	Garwa Farm	Limestone SS978798	Lafarge Cement Ltd
	Lithalun	Limestone SS899765	Hanson Aggregates
	Pantyffynnon	Limestone ST046740	Seth Hill & Son Ltd
	Wenvoe	Limestone ST130741	Cemex Ltd
	Forest Wood (see RCT)	Limestone ST015798	Hanson Aggregates
	Argoed Isha**§	Limestone SS992790	T Pritchard/J Rosser
	Ewenny	Limestone SS902768	Lafarge Aggregates/Minimix
	Cnap Twt**§	Limestone SS911753	Duchy of Lancaster
	Longlands	Limestone SS928772	Green Circle Ltd/Viggars Bros
	Pant	Limestone SS895760	Tarmac Ltd
	Ruthin**§	Limestone SS975792	Lafarge
	St Andrews**§	Limestone ST143714	T J Bowles
	Barry Docks	Marine Sand ST127667	Cemex Ltd
	Aberthaw Power Station	PFA/FBA (Sec) ST038660	RWE nPower

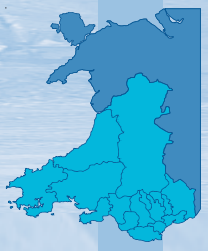




APPENDIX B

MEMBERS OF THE SOUTH WALES REGIONAL AGGREGATES WORKING PARTY

(as at August, 2010)



M J Hooker
(Chairman)

S J Bool
(Secretary)
Mineral Officer
Bridgend County Borough Council

G Jones
Chief Regeneration Officer
(Development Services & Private Sector Housing)
Blaenau Gwent County Borough Council
(represented by Ms L Healey)

John Cook
Chief Executive/National Park Officer
Brecon Beacons National Park
(represented by C Morgan)

P Mears
Chief Planning Officer
Caerphilly County Borough Council
(represented by Mrs R Amundsen)

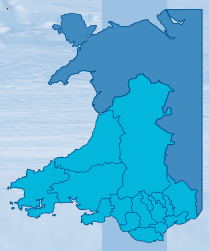
J Stedman
Strategic Planning Manager
Cardiff County Council
(represented by S Williams)

B Thomas
Director of Planning Services
Ceredigion County Council
(represented by G Dorrington)

E Bowen
Head of Planning, Environment
& Economic Development Department
Carmarthenshire County Council
(represented by H Towns)

N Davies
Planning Manager
Merthyr Tydfil County Borough Council

G Ashworth
Head of Planning & Regeneration
Monmouthshire County Council
(represented by M Davies)



G White
Head of Planning Services
Neath Port Talbot County Borough Council
(represented by N Morgan)

S Wild
Head of Planning & Economic Regeneration Services
Newport County Borough Council
(represented by Ms L Christian)

Dr Steven Jones
Director of Development
Pembrokeshire County Council
(represented by Stephen Hurr)

Ifor Jones
Head of Conservation
Pembrokeshire Coast National Park
(represented by Mrs Julie Kirk)

Gareth W Thomas
Director of Planning & Economic Development
Powys County Council
(represented by S Packer)

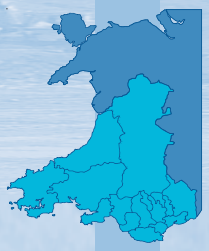
Jane Cook
Director of Regeneration & Planning
Rhondda-Cynon-Taff County Borough Council
(represented by Owen Jones)

B Graham
Head of Planning Services
City & County of Swansea
(represented by Mrs R Henderson)

Duncan Smith
Chief Officer
Planning & Public Protection
Torfaen County Borough Council
(represented by A Wilcock)

R Thomas
Head of Planning & Transportation
Vale of Glamorgan
(represented by M Lucas)

K Hobden
Planning Officer
Mineral Products Association



K Seaman
Representative MPA
Mineral Products Association

M M Frampton
Representative MPA
Mineral Products Association

M Lawer
Representative MPA
Mineral Products Association

B Hollington
Farming & Rural Conservation Agency
(Agricultural & Rural Affairs Department)

S Martin/J Smith
Welsh Assembly Government

M Wrigley
Crown Estate

to be confirmed
British Geological Survey

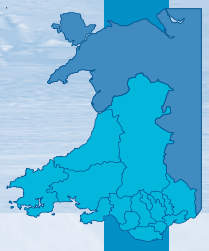
J Cuddy
Cuddy Demolition & Dismantling

A Wilkes
Environment Agency Wales

Karen Maddock-Jones
Countryside Council for Wales

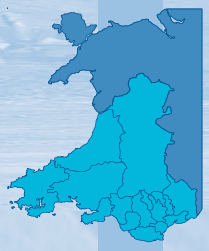
P Huxtable
British Aggregates Association

I Fox
RWE npower



APPENDIX C

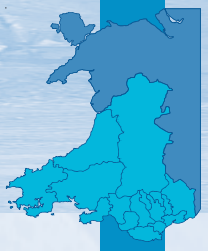
REPORTS PRODUCED BY THE SOUTH WALES REGIONAL AGGREGATES WORKING PARTY



REPORTS PRODUCED BY SOUTH WALES REGIONAL AGGREGATES WORKING PARTY

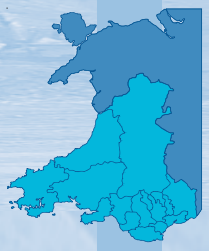
The following reports are available free on our website:
www.swrawp-wales.org.uk

1.	**Annual Report 2003**	*August 2004*
2.	**Annual Report 2004**	*June 2006*
3.	**Annual Report 2005**	*March 2007*
4.	**Annual Report 2006**	*October 2007*
5.	**Annual Report 2007**	*December 2008*
6.	**Annual Report 2008**	*October 2009*
7.	**Annual Report 2009**	*November 2010*



APPENDIX D

-AIMS & OBJECTIVES-
OF THE
SOUTH WALES
REGIONAL AGGREGATES
WORKING PARTY



-AIMS & OBJECTIVES-
OF THE SOUTH WALES R.A.W.P. (2010-2014)

Aim

The core aims will be to provide an honarary Chairman to be supported by a dedicated secretariat and technical services necessary for the effective functioning of the Regional Aggregates Working Party (RAWP) in South Wales.

The specific objectives to be delivered are set out below.

Objective 1: Administration and Liaison

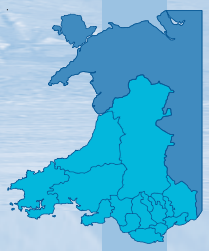
1(i) **Honorary Chairman:** to chair a minimum of 2 meetings each year of the South Wales RAWP, together with sub-group meetings as required and to attend the National Co-ordinating Group (NCG) in London. The NCG is chaired by a senior official in Communities and Local Government and comprises the Chairs of the RAWPs and representatives of the industry.

1(ii) **RAWP meetings:** the seretariat to organise a minimum of 2 meetings each year of the South Wales RAWP, together with sub-group meetings as required in liaison with the Chairman and members, including:

- arranging date and venue of the meeting, and providing appropriate refreshments;
- circulating the agenda and papers;
- drafting related correspondence and papers as necessary;
- providing and circulating a draft minute of the meeting within 2 weeks of the meeting;
- revising and circulating minutes to take account of members comments;
- ensuring minutes are placed on the website and made available to the public for inspection.

1(iii) **Liaison:** the secretary to:

- liaise with the Mineral Planning Officers in the region, to include meetings at the MPA offices as appropriate;
- facilitate regional or group working by providing supporting technical aggregates advice as appropriate;
- liaise with RAWP secretaries in Wales and England and where possible to attend meetings of the North Wales RAWP and relevant English RAWPs by invitation;
- attend the regular national meetings of the 10 RAWP Secretaries;
- attend at least 4 meetings with the nominated officer of the WAG per year;
- draft related correspondance as required;
- attend Planning Officers Society for Wales (POSW) Minerals and Waste meetings in the capacity of RAWP secretary.



1(iv) **Input into national guidance on aggregates provision:** to help the RAWP make an appropriate contribution to the preparation of national guidance by advising on the demand for and supply of aggregates in the region. It will be expected that the Technical Secretary will attend appropriate and relevant seminars and conferences that may assist in the development of RAWP work (in cases of doubt the approval of attendance will be confirmed by the Assembly's nominated officer). Costs relating to overnight accommodation or travel outside the UK to be agreed prior to the costs being incurred.

1(v) **Default arrangements:** to ensure that regular liaison with other mineral planning officers is undertaken to secure progress on monitoring and reporting work. In the event of inadequate progress, it may be necessary for additional work to be undertaken by the RAWP Technical Secretary in consultation with the nominated officer and RAWP members.

1(vi) **A South Wales RAWP or joint South/North Wales RAWP website:** separately funded over the period of this grant, will be maintained and kept up to date by the secretariat to include RAWP publications and final RAWP meeting minutes. The website should be developed further in discussion with the Assembly nominated officer, to include isues of interest e.g. significant ALSF projects funded in the area, links to WAG relevant research etc.

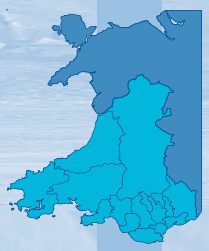
Objective 2: Research – Monitoring

2(i) **Annual primary aggregates surveys:** to organise, co-ordinate and collate annual surveys of the production of primary aggregates (including marine dredged) and reserves undertaken by MPAs. In years when the 4-yearly Aggregates Monitoring (AM) Surveys are carried out, the normal annual surveys will not be necessary but an annual report will still be produced;

2(ii) **AM2009/2013:** to support AM2009 by distributing survey forms to MPAs and ensuring that forms are forwarded to operators, and that returns are timely, accurate and collated as required, and to assist in preparations for the AM2013 survey as necessary.

2(iii) **Road planings:** to carry out an annual survey of the arisings and re-use of road planings, to include information from the Trunk Roads Agency.

2(iv) **Alternative materials:** to identify and monitor the key regional sources of alternative material with potential for use as aggregates (other than C and D waste and road planings, but including minerals used as non-aggregates), identify key contacts, maintain an up-to-date list of sources of materials with potential for aggregates use, and collect reliable information on arisings and actual potential use of such material as aggregates through liasion with the Environment Agency Wales with a view to promoting and reporting on the use of alternative materials to primary aggregates to RAWP meetings and in the annual reports;



2(v) **Development plans:** to monitor UDPs/LDPs and future development programmes and major proposals to determine regional demand for aggregates and any potential shortfall of supply.

2(vi) **Planning decisions:** to monitor mineral planning decsions determined since the previous RAWP report; to record permissions, refusals, POMP decisions and the decisions on Prohibition Orders. For permissions granted the size, output, end-date and end-use should also be recorded in the Annual Reports.

Objective 3: Research - Assessment

3(i) **Demand /supply of aggregates:** to assess the projects for changes in the demand and supply of all types of aggregates in the region;

3(ii) **Landbanks:** to assess reserves of primary aggregates in active and dormant sites at a regional and MPA level, and the likelihood of dormant reserves being activated.

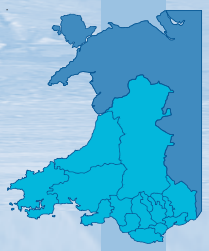
3(iii) **Alternative materials:** to assess the use of secondary and recycled materials (including C and D waste) as aggregates, to consider ways of improving data collection and increasing use of such materials as aggregates, including anassessment of each unitary authority's capacity and success in recycling materials as aggreagtes.

3(iv) **Environmental capacity:** to assess the need for further strategic environmental assessment, such as IMAECA, to provide base data for any review of the Regional Technical Statement.

Objective 4: Reporting

4(i) **Annual report:** to prepare and publish an annual report that takes account of the comments of RAWP members, as hard copy and electronic versions, and to be published on the web site (3 hard copies to be supplied to WAG). The minimum content should be as follows:

- a report on the assessments undertaken in relation to Objectives 2 and 3;
- a calculation of the regional and individual MPA land bank based on reserves, production and scale of apportionment in the Regional Technical Statement as at 31 December each year (subject to compliance with agreements relating to confidentiality of information);
- information on alternative sources of aggregates;
- a summary of progress and relevant content in relation to the provision of aggregates in the preparation of development plans in the region;
- a comprehensive list of active and inactive sites producing aggregates in the region;
- a list of dormant sites in the region;
- a list of prohibition orders confirmed in the region to date;
- a list of mineral planning appliactions and permissions determined (including those relating to mineral review applications) since the previous RAWP report);



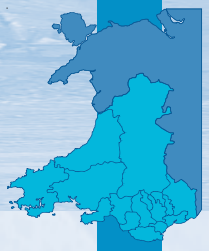
- a list of planning proposals and permissions approved for major construction projects and an appraisal of how these may have a regional influence on the demand for aggregates;
- a summary of monitoring, review and effectiveness of the implemenattion of the Regional Technical Statement drawing on information provided by MPAs in the region in relation to aggregates issues;
- a summation of the policy for aggregates in UDPs and LDPs for the region to set out the current strategy for the provision of aggregates in the region;
- advice on the potential in the region for increasing the use of alternative materials in place of primary aggregates.

4(ii) Regional Technical Statement - Review: by the beginning of 2012, to produce a strategy to inform the review of the Regional Technical Statement, setting out the timetable and work required to complete the review focussing on the section relating to aggregates provision in local authority Local Development Plans.

Objective 5: Contract Monitoring Objectives

Monitoring will consist of:

- a minimum of three-monthly meetings with WAG officials in Cardiff, at which the progress against the core and intermediate objectives is reviewed and appraised (one of these meetings will be arranged jointly with the North Wales RAWP Secretary);
- submission of a brief monitoring report at the year end, to incorporate evidence-based assessment of work carried out. The report at the end of the contract period shall include a summary of the objectives achieved throughout the contract period, the steps taken to achieve them and any difficulties which have limited or prevented their achievement;
- submission of mid-year progress report to show the extent the objectives are being achieved (or reasons for any shortfall) and an interim income and expenditure account and forecast;
- all claims for payment shall set out clearly what work has been undertaken including details of the time dedicated to the work and what has been achieved in the period to which the invoice relates.



NOTES

Reports which are still in print may be purchased from:-
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