Sector Analysis: Minerals and aggregates

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1. Introduction

1.1 This analysis describes the characteristics and scale of the minerals and aggregates sector, and its impacts on the delivery of nature conservation objectives in England. It gives English Nature's objectives for the sector, and sets out our four priority actions for 2003-2004. We also identify the key organisations and actions needed to influence policy and its delivery

1.2 We outline the roles of the key players and shapers within the sector. The dominant influences in this sector are:

- government,
- the minerals industry,
- mineral planning authorities,
- local authorities, and
- specialist interest groups.

1.3 We examine the key socio-economic and political factors that shape the sector. We look at the economic impacts of the sector, and the way in which extraction activity is distributed and managed both nationally and locally.

1.4 We analyse the positive and negative impacts of the sector on nature conservation. Whilst the analysis identifies the range of impacts on biodiversity, such as the loss, degradation and fragmentation of habitat and the reduction in species numbers, it also recognises that there is a huge potential for environmental gains through sensitive operation and site restoration.

2. Characteristics and scope of the sector

2.1 The minerals sector is an important nature conservation issue because:

- Around 114,000 hectares of land in England are covered by minerals planning permissions, of which just under a third are in SSSI, SAC, SPA, Ramsar sites, National Parks or AONB.

- Past experience tells us that there is a real risk that mineral extraction can severely damage nature conservation interests through the loss, degradation and fragmentation of valuable habitat areas and a reduction in biodiversity.

- On the whole, the industry is mindful of its environmental obligations, and is already making a significant contribution to bio-and geodiversity at a national level through site restoration, and through involvement in the wider environment.

2.2 The extraction of minerals forms a distinct sub-sector of industry based on the Earth's mineral resources. For the purposes of this analysis, the extraction of energy minerals - coal, oil, peat, gas and offshore aggregates are treated as part of the sector. The downstream impacts are dealt with separately as part of the construction sector analysis and energy policy.

2.3 The processing of minerals produces the products which are essential to our modern lives, including aggregate for homes, schools and hospitals; ball clay for our sinks and

baths; silica sand for the production of glass; as well as the vital oil and gas upon which we all depend. It therefore follows that the extraction and processing of these minerals is a national priority. It is the job of English Nature to ensure that we put sustainable development at the heart of the planning system which decides what minerals are extracted from where, and that where possible the environment is enhanced as part of this process.

2.4 Whether extracted by deep mining, opencast/quarrying or dredging, there are often significant environmental impacts from modern mineral extraction. The road haulage of minerals means the impacts of quarrying are widespread.

2.5 Although in financial terms the oil and gas industry is nationally the most important, the vast majority of this wealth is generated in Scotland. However, Wytch Farm in Dorset is the largest onshore oil field in Western Europe.

2.6 Both in resource and environmental terms, the industry is ultimately unsustainable. The impacts of mineral extraction on nature conservation vary with the type of mineral extracted, and the process used to extract that mineral. For example, oil and gas extraction generally have a relatively small impact on the environment compared with, say, open cast coalfields or the impacts on wet heath and bog of gravel extraction.

2.7 Restoration of used sites may have significant benefits in terms of increasing habitats and contributing to biodiversity action. However, less than 66% of quarries have restoration conditions. As well as biodiversity benefits, the production of rock exposures in quarries is important for geological conservation.

2.8 The minerals industries are tightly regulated through a range of Planning, Health and Safety, and Mines and Quarries legislation. Other pertinent environmental regulations include Environmental Assessments, the Environmental Protection Act (1990), the Environment Act (1995)(Review of Old Mineral Permissions), various wildlife and countryside legislation and offshore licensing by the Crown Estate Commissioners (through what is known as the Government View procedure). This Government view procedure is about to change with the introduction of Environmental Impact Assessment and Habitats (Extraction of Minerals by Marine Dredging) Regulations. This will require consultation with both statutory and non-statutory consultees and, if necessary, public inquiry. On the whole the offshore dredging industry is relaxed about the implementation of these regulations, as it believes it will introduce a transparent system of resource management. It does, however, believe that some aspects, such as monitoring, will need to be carefully managed.

2.9 Mineral distribution is related to geology, and can therefore link to English Nature's Natural Areas and Marine Natural Areas. Widespread minerals like sand and gravel are extracted across the country, but hard rocks such as limestone are limited mostly to an area northwest of a line between the Humber and the Exe. There is a significant concentration of hard rock extraction sites in the East Midlands Region (the White Peak and Charnwood Forest in particular). Other minerals are more limited in extent. For example, ball and china clay are unique to the Southwest Region, and salt is mined in the Northeast and Northwest Regions only. In 2001 around 23 million tonnes of sand and gravel were dredged from licensed areas around the coast. This represents around 10% of the national aggregate requirement. In the Southeast, marine aggregates represent one-third of the total supply. Nationally, the use of marine aggregates is equivalent to the production of around 50 medium sized

quarries. As with terrestrially sourced sand and gravel, the demand for marine aggregates is driven primarily by the housing and construction market. However, the demand for beach re-nourishment material is becoming an important market, with around 22% of marine aggregate being used for fill and beach feeding. The move towards softer engineering in our coastal zone means this will continue to be an important market.

2.10 One important element of the marine aggregate industry is the high percentage, around 20%, that is exported to the continent.

3. Key shapers and players

Shapers - defining the rules of the game

3.1 ODPM sponsors the industrial extraction of material used in the construction industry, including aggregates, gypsum, cement (and its raw materials), brick clays and dimension stone. They control the planning system for supply of most minerals, produce minerals planning policy, legislation and guidance, and are considered to be a planning and policy setter rather than an arbiter. In the past supply was forecasted using data based on construction activity. According to ODPM figures between 2000 and 2011 annual aggregate consumption is expected to increase by about 5%. ODPM have indicated that they wish to see a 19% reduction in the provision of primary aggregates in England. This reduction is based on an assumption that recycled and alternative sources of aggregate will account for 23% of the total demand in England. This switch to recycled aggregate is prompted by the aggregates levy which makes recycled aggregate relatively cheaper, government procurement which will encourage the use of recycled material and an increase in the willingness of industry to use recycled material as they become more confident in its ability to deliver a high quality product.

3.2 In 2002 the government indicated that it wanted to see a change in the way minerals allocation was managed. Minerals Local Plans will now be replaced by Minerals Development Frameworks that would be consistent with Community Strategies. Mineral Planning Authorities will still be the decision makers on all aspects of planning control, plan making, and revisions of permissions under the Environment Act 1995. Mineral planning is a specialised sub-discipline within Town and Country Planning, and is usually dealt with by the County Council or Unitary Authority.

3.3 The Department of Trade and Industry's (DTI) Engineering, Automotives and Metals Division sponsors energy and non-construction minerals including metallic ores, china clay, ball clay, fuller's earth, barytes, fluorspar, industrial limestone, silica sand, potash and salt. DTI also cover the oil and gas industry.

Key players - seeking to influence the rules of the game

3.4 Individual companies tend to concentrate on one type of extraction such as coal or aggregates, but the multi-nationals have interests across the sector and related downstream sectors. In aggregates alone, there are over a hundred smaller operators and numerous major companies, particularly: Hanson Plc, Tarmac, Lafarge, RMC, Aggregate Industries and Foster Yeoman.

3.5 The interests of individual companies of all sizes are covered by representative trade federations who function primarily as representatives and lobbyists, but also have a

self-regulatory function for parts of the industry. The main federations are: the Quarry Products Association (QPA) (aggregates), the British Cement Association, British Ball Clay Producers Federation, the Silica and Moulding Sands Association which although independent works through QPA, and the Brick Development Association. In 1999 the British Aggregates Association (BAA) was formed, partly in response to the Quarry Products Association's work with Government on the 'New Deal' as an alternative to the Aggregates Levy, and generally represents the views of smaller operators who produce around 10% of the national aggregate output.

3.6 The Confederation of British Industry's Minerals Committee functions as an executive body for the minerals-producing sector, with representatives from all trade federations. It represents a powerful voice for the industry.

3.7 There is an increasing trend in the minerals industry to lease (rather than buy) land for extraction and return it to the landowner upon restoration. This is an important factor in negotiating site-specific environmental conditions and restoration agreements, as the landowner's wishes (rather than the operator's) will control the final restoration design and long-term management agreements.

3.8 Because of close business contacts, operators in related sectors of industry such as energy, construction and waste are influential.

3.9 Non-governmental organisations such as the Royal Society for the Protection of Birds, the Council for the Protection of Rural England, Friends of the Earth, the Council for National Parks and the Wildlife Trusts have great influence, not only at community level, but increasingly at a national level where they are involved in national policy making. These groups work together through Wildlife and Countryside Link.

3.10 Statutory agencies such as the Countryside Agency, the Environment Agency and English Heritage are involved in legislation and guidance through the mineral planning system, environmental legislation and conservation designations, as part of their statutory duties.

3.11 Although there is little trade (less than 3%) in aggregates between the UK and the rest of Europe, other minerals are traded internationally. These include china clay, for which the UK is a major world producer, and coal imported from France and Belgium (amongst others). The aggregate market is showing signs of internationalisation through superquarries, particularly in Norway.

3.12 Trade in coal is a key administrative duty of the European Commission under the European Coal and Steel Community (ECSC) which established a common market in steel and coal. Like all industry functions in the EU, this is administered through the EC Directorate General, (DG) Enterprise. The ECSC is funded directly by a levy from the various producers, and ECSC loans are available to fund improvement schemes for areas affected by declining coal production. Importantly, ECSC also deals with restrictive practices and discriminatory tax practices which extend to powers in connection with common policies such as environment, agriculture and fisheries. Under subsequent treaties, this role for DG Enterprise extends to other areas of the minerals industry such as aggregates.

4. Socio-economic and political factors

4.1 Mining and quarrying involves some of the UK and Europe's largest companies. The UK minerals sector in 2001 had a total market value of £26.5bn. Around 90% of this value comes from the oil and gas industries. The majority of the remainder is sand and gravel, and limestone products. Although the number of workers has decreased with the closure of deep coalmines, the industry nationally still employs around 300,000 people. Understandably the majority of these are involved in the offshore oil and gas industry, although the quarrying industry is significant with around 40,000 people, and another 2,500 employed in the offshore aggregate industry.

4.2 It is important to remember that there are often significant numbers of people involved in the processing and selling of products associated with extraction. For example, ball clay in Devon and Dorset accounts for all the ball clay produced in the UK, with some 650 employees in Devon generating around £30m of income per year. However, the ceramic industry, which is partly dependant on this extraction, has a turnover of £1,000 million per annum and 30,000 jobs.

4.3 Currently, large companies that consolidate to increase reserves and acquire downstream product companies dominate the minerals market. There is an increasing internationalisation in the market place through companies such as Hanson and Lafarge. Companies tend to be linked strongly by their market strategies to downstream activities such as construction and chemicals. Tarmac, for example, has interests in housing and road building as well as aggregate extraction. Other companies such as Hanson are conglomerates with wider interests. Although the largest part of the market is taken by large companies, smaller and family interest firms still form a substantial part of the sector overall, particularly in sand and gravel, and in the smaller production minerals such as metallurgical minerals.

4.4 Historically, the industry has had a poor public environmental image in spite of planning regulations concentrating on cleaning up transport dust, noise and screening operations from surrounding areas. Recent research by London Economics for the Department of Transport, Local Government and the Regions reported that people living close to quarries view them as 'blots on the landscape'. Impacts on wildlife, nature and landscape are cited amongst the main reasons for this.

4.5 There is increasing emphasis on environmental issues in UK legislation and business. Current areas of interest include the potential revocation of mineral permissions due to the Habitats Regulations and the Aggregates Levy.

4.6 The Aggregates Levy, which came into effect on 1 April 2002, stands at £1.60 per tonne for sand, gravel, including marine aggregates, and crushed rock. Coal, clay and building stone are not taxed. The government set up the levy in an attempt to address the environmental impacts of quarrying. 10% of the revenues raised are set aside for use as the Aggregates Levy Sustainability Fund (ALSF), which aims to deliver environmental benefits that can offset the costs of aggregate extraction.

4.7 The industry campaigned hard against the levy. They feel that their industry is being taxed unfairly, and that the tax will not deliver the social or environmental gains effectively. In November 2003 the Chancellor announced that the Aggregates Levy Sustainability Fund would be extended for a further three years, and English Nature has been advised that we will be responsible for disbursing £3.3m of grants under the scheme in 2004/05.

4.8 The funds that have become available through the ALSF have contributed to biodiversity and geodiversity projects throughout England. They have contributed to the restoration of heathland, the re-exposure of geological faces, the examination of offshore biodiversity, and a number of projects with specific benefits to local communities.

4.9 Internationalisation of the marketplace for bulk construction materials such as aggregates has led to greater import and export, and pressure to open superquarries to supply these markets. It is highly unlikely that a superquarry will locate in England under the present planning and environmental climate.

4.10 Recent announcements by the government relating to construction and road building suggests that there will be strong demand for aggregates over the foreseeable future - for example, each 1km lane of motorway requires 45,000 tonnes of aggregate.

4.11 Traditionally the minerals industry used to be heavily involved in waste disposal. Many companies are now withdrawing from this market to concentrate on extraction. Despite the impact of the Landfill Tax, recycling, incineration and composting, which all reduced the amount of waste sent to landfill, demand for landfill sites remains high with demand outstripping supply.

5. Impacts on nature conservation

5.1 Mineral extraction can impact land and marine conservation. Habitats are lost directly through land-take in opencast mineral extraction, with consequent impacts on species populations and movements. Similar effects can arise with sub-surface mining and marine aggregate dredging. Mineral extraction also has secondary effects on nature conservation through dust, noise, dumping of mineral wastes and transport infrastructures. Many natural features such as hydrological and landform systems can be degraded through mineral extraction. These effects can range from the very short term to permanent. Quarry waste from larger scale operations such as opencast coal, may be transported to other disused quarries and used as landfill. Potential waste donor sites may include Sites of Special Scientific Interest (SSSIs) and other sites of nature conservation value. In a recent study, around 80 SSSIs were identified as being under threat from extant planning permissions for mineral extraction. Supported by the People for Nature programme English Nature has recently purchased two quarries, one in Aldermaston, Berkshire and the other in Cocknowle, Dorset. These SSSIs both had planning permission to expand which would have had serious consequences for the nature conservation interest. The sites will be passed to the local Wildlife Trust to be managed. Although expensive, the purchase of the sites has avoided a lengthy legal process that may not have delivered the desired result.

5.2 Further nature conservation impacts arise which are specific to mineral and/or mineral products. The most significant onshore effect is air pollution from cement and brick making processes. Offshore extraction of sand and gravel can impact directly upon seabed communities and fisheries through loss, disturbance and increased sediment loading in the water column. Impacts upon soft coastlines, dunes, shingle features and associated habitats are also a concern if not managed correctly.

5.3 On the positive side, the restoration of quarries by the industry represents one of the biggest single opportunities to increase biodiversity and geodiversity. The large land holdings which the industry has, combined with their increasing expertise in restoring quarries to biodiversity and geodiversity, means that restoration provides a great

nature conservation opportunity. This work has been drawn together into joint English Nature, Quarry Products Association (QPA) and Silica and Moulding Sand Association (SAMSA) publications on biodiversity and geodiversity associated with mineral extraction, entitled "Geodiversity and the Minerals Industry - Conserving our Geological Heritage".

5.4 65% of English Nature's Natural Area objectives have mentioned the minerals industry specifically. Of the other 35%, casework demonstrates that minerals are a major concern, such as the Dorset Heaths, where ball clay and sand and gravel extraction takes place.

5.5 A rough analysis of Natural Area objectives identifies the key area of concern as being the need for adequate restoration to and management of sites for nature conservation, both through the planning process and liaison with the minerals industry. 64 objectives specify geological conservation after-uses rather than wildlife. A large proportion of objectives are concerned with positive management of disused sites, although the prevention of further mineral working and the consequent damage to sites of nature conservation value are also important.

5.6 The major operators manage a significant number of SSSIs in England. For example, RMC manage around 39 SSSIs, Lafarge manage around 23 SSSIs, including a National Nature Reserve, and Aggregate Industries manage around 20 sites. Hanson manage over 40 SSSIs, guided by a joint Memorandum of Understanding. Plans are underway with Hanson, Lefarge and Aggregate Industries to get site units they control into favourable condition, thereby helping us reach the SSSI PSA target.

5.7 The sector could make a substantial contribution to nature conservation through site selection and the reassessment of ongoing operations to avoid important habitats. In addition, there is potential positive involvement by contributing worked and adjacent landholdings for the delivery of Habitat and Species Action Plans (HAPs and SAPs). Key habitats include limestone pavements, and upland heathland. English Nature's *Research Report 279*, prepared jointly with the QPA and SAMSA, has led to a handbook promoting involvement of the industry with local biodiversity steering groups and HAPs, along with associated SAPs. This handbook *Biodiversity and Minerals: extracting the benefits for wildlife* can be found on English Nature's Website. Other potential actions with the industry include promotion of survey and monitoring, training, and input of capital to wider projects.

5.8 Active working of quarry sites in most instances provides continually changing exposures of rock, potentially of geological conservation value. Site after-uses need to take account of important rock faces, and build their maintenance into restoration plans.

5.9 As stated above, the industry has the potential to make a huge contribution to biodiversity and geological conservation. This is, in part, encouraged through the QPA restoration award that recognizes the contribution of the industry. We have successfully lobbied for a nature conservation category to be included. These awards are highly prized within the industry, and are an effective tool for influencing long-term management of sites. However, the system needs to shift from one which sees after-use as outside the quarry process, to an all encompassing system which integrates the potential nature conservation benefits from the start to finish of the operation. We need to continue to influence companies to promote the importance of

reassessing the impacts of ongoing operations, and to move them away from seeking permission to work land of nature conservation importance.

6. Sectoral objectives

6.1 Work with the minerals sector contributes directly to a number of objectives in English Nature's strategy. The sector also contributes to several corporate priorities set out in our Corporate Plan. Through its restoration programme, the minerals industry contributes to the wider environment programme through involvement in Biodiversity Action Plan (BAP) work. As an example, once restored, Needingworth Quarry in Cambridgeshire will lead to the creation of a 700 ha wetland site including around 460 ha of reedbed. Bearing in mind there are only 5000 ha of reedbed in the UK, and only 50 of these have more than 20 ha, this is a significant contribution to BAP targets for which English Nature is the lead partner. Our work on enhancing designated sites, influencing policy changes, and encouraging high standards of environmental protection among statutory agencies and businesses, all helps to promote our *People and Policies* and *Designated Sites* programmes. Similarly, our minerals related work with the industry and other statutory bodies helps raise our profile nationally as an effective nature conservation body delivering clear and consistent messages. The plan also contributes directly to objectives set out in our *Geological Conservation Strategy*.

6.2 We have three nature conservation objectives for this sector:

6.2.1 no damage to critical parts of our natural environment from mineral extraction. There should be full mitigation for any loss of function of other nature conservation capital;

6.2.2 minimisation of the negative impacts (actual and potential) of mineral extraction and maximisation of area of SSSI in favourable condition;

6.2.3 work towards a significant increase in the number of mineral sites with nature conservation and geological after-uses, including:

- Delivery of after-uses which contribute to geodiversity and BAP targets, are consistent with Natural Area objectives, and which support local priorities.
- Maximise the opportunities for geological and biological conservation afforded by mineral extraction.

6.3 We want to promote effective management of the impacts of mineral extraction on the natural environment, and we will take a partnership-based approach aimed at ensuring that the nature conservation resource is enhanced.

6.4 To ODPM Minerals and Waste Division and Mineral Planning Authorities, we will advocate the need for changes to the planning system, to ensure that all future extraction is sited away from vulnerable natural features. We will do this through our Position Statements *Aggregate extraction and nature conservation* and *Non-aggregate mineral extraction,* by active liaison with key shapers, and consultation responses on research, legislation and policy guidance.

6.5 Until such changes are achieved, we will continue to work through the current system to minimise damage to wildlife and natural features, and to oppose mineral

developments that have a significant adverse impact on SSSIs or Natura 2000 sites. We will seek revocation, or in exceptional places buy-out, of planning permissions where aggregate working is likely to harm or destroy irreplaceable natural sites. We will continue to provide advice to national, regional and local government on consultations affecting wildlife and geology .

6.6 We will work with the minerals industry to develop policies which avoid critical sites voluntarily, re-assess sites where ongoing operations are damaging nature conservation interests, and play a full part in contributing to a sustainable approach to mineral extraction. We will achieve this through the Statement of Intent, and its associated Action Plan, agreed with the QPA and SAMSA. We will work with the very successful Minerals Industry Forum to ensure we have effective lines of communication with the industry.

6.7 The demand for primary aggregate must be managed in ways which reduce long-term pressures on our environment. We will advocate the use of economic instruments, such as the Aggregates Levy, as useful tools in managing both demand and supply.

6.8 We seek to prevent pollution arising from mineral working and processing. We will encourage the industry to mitigate for its damaging impacts on wildlife, and aim for environmental management to the standards of ISO 14001 and Eco-management Audit Scheme.

6.9 With all parts of the sector, we will promote the importance of biological and geological afteruses for mineral extraction sites, within the framework of reversing habitat fragmentation, increasing biodiversity, and contributing to BAP targets.

6.10 We will promote the Aggregates Levy as a tool for reducing the production of primary aggregate. We will liaise with the industry to ensure we understand their concerns over the tax, and communicate with them over this sensitive issue in a constructive manner. We will ensure government decision makers and others understand how effective the ALSF has been as a mechanism for increasing biodiversity and geodiversity, and the benefits that have accrued to local communities and nature conservation from it.

6.11 Environmental Impacts Team will coordinate links within English Nature between staff with relevant experience of the aggregates sector.

7. Regional analysis

7.1 As the distribution of minerals is a function of geology there is a strong regional dimension to the minerals sector. This is reflected in the way minerals are managed. For the purposes of the current system, the aggregates market is divided into areas equivalent to the Government Regions. Each Region has to supply an apportioned part of the overall forecast figure for aggregate demand by means of a ‘landbank’ of aggregate permissions. Regional Aggregate Working Parties (RAWPs) are assigned to calculate and agree apportions. A National Coordinating Group (NCG) acts as arbiter and makes initial apportionments. At present there are eight RAWPs in England.

Region	Issue	Action	Key Partners	English Nature Action
North West	Around 50% of England's silica sand production comes from the NW. Nationally important mineral often in important areas for nature conservation.	1. New applications should, where possible, be sited away from these most vulnerable areas. 2. Ensure that these resources are not sterilised by other development.	SAMSA ODPM Mineral planning authorities	Ensure local team officers are aware of the importance of these minerals, and the strategies for dealing with applications to enhance nature conservation benefits.
SE England	Large demand for aggregates, many of which are imported from other regions.	1. New developments should look to use aggregate, especially primary materials wisely. 2. Support targets to reduce demand, and encouraging greater use of alternative and recycled materials.	ODPM Industry QPA British Aggregates Association Mineral planning authorities	Ensure Conservation Officers are aware of the impacts that quarrying can have, and the benefits that can accrue from a sustainable system of aggregate use.

Region	Issue	Action	Key Partners	English Nature Action
South West	Regional Minerals such as ball clay present in areas of high nature conservation importance Large number of quarries, so restoration to nature conservation is a major opportunity.	1. Exploitation should be concentrated in areas of existing extraction where possible. 2. Ensure that these resources are not sterilised by other planned development. 3. Restoration should target those habitats and species characteristic of the area.	ODPM QPA Industry Mineral planning authorities	Ensure local team officers are aware of the importance of these minerals, and the strategies for dealing with applications to enhance nature conservation benefits.
Yorkshire and Humber	Large proportion of aggregate comes from National Parks, which can affect nature conservation and landscapes	1. Ensure new sites are located away from vulnerable locations. 2. Work to minimize environmental impacts.	ODPM QPA National Park Authorities	Ensure good liaison with National Park Authorities, who act as the Minerals planning authority.
Marine	English Nature may come into conflict with the industry if designated sites are proposed in areas where they dredge.	1. Open dialogue with industry so they are aware of progress, and can feed into the discussions.	British Marine Aggregates Producers Association JNCC ODPM	Ensure good liaison between industry, JNCC and English Nature.

8. Summary of priority actions for 2004 to 2005

Priority action and key messages	Key shapers	Key players	English Nature lead teams/individuals
M1 Co-ordinate the Minerals Industry Forum and its examination of the Industries contribution to bio and geodiversity (including transport impacts), and its work to ensure the industry is delivering favourable condition on sites it controls (around 100 SSSI). Expected nature conservation gains include: • Better liaison between regulators and industry • Increased understanding of the impacts, positive and negative, of mineral extraction on bio and geodiversity • Delivery of PSA target	ODPM Minerals Industry MPA DTI ECNC, Steering Group	Minerals Industry, particularly • Lafarge • Hanson • Aggregate Industries Mineral Planning Authorities NGO's	Director- designated sites Senior Minerals Policy Advisor, Senior Planner, Head of Geology, Area Manager - Derbyshire & Peaks Local teams, especially, East Midlands and Dorset
M2 Influence national government policy on the development of ALSF Expected nature conservation gains: • PSA delivery • Continued benefits for local communities, bio and geodiversity gains • Reduction in amount of primary aggregate quarried and/or amount of aggregate won from environmentally unacceptable areas • Increase the role of recycled aggregate in industry	ODPM Minerals and Waste Planning HM Treasury QPA	Mineral Planning Authorities QPA NGO's Minerals Industry Wildlife Link	Chief Executive Director - Keith Duff Senior Planner, Head of Geology Senior Minerals Policy Advisor External Relationships Team Local teams

Priority action and key messages	Key shapers	Key players	English Nature lead teams/individuals
M3 Influence national, regional and local minerals policy development through • MPG6 - Guidelines for Aggregates Provision in England • Regional Aggregate Working Parties • Supporting Community Strategies Expected nature conservation gains: • PSA Delivery • Development of a long-term sustainable strategy for the provision of aggregates including recycled aggregate at national, regional and local level.	ODPM Minerals and Waste Planning QPA RAWPS NCG LPA	Mineral Planning Authorities QPA NGO's Minerals Industry Wildlife Link	Head of Geology Senior Planner, Senior Minerals Policy Advisor Local teams