



**Northfleet
Harbourside**

MINERALS INFRASTRUCTURE ASSESSMENT

SEPTEMBER 2022



NORTHFLEET CENTRAL 1 LIMITED

ROBIN'S WHARF, NORTHFLEET

MINERALS INFRASTRUCTURE ASSESSMENT

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NORTHFLEET CENTRAL 1 LIMITED

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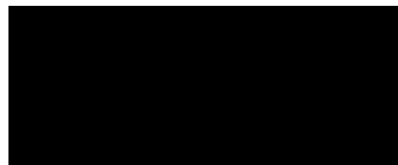
MINERALS INFRASTRUCTURE ASSESSMENT

SEPTEMBER 2022

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DRAWINGS TITLE

ST19719 – 001 Robins Wharf

ST19719 – 002 Robins Wharf relative to planning redline boundary

ST19719 - 003 Minerals Infrastructure Safeguarding Plan (Kent Minerals and Waste Local Plan 2021-2030)

ST19719 - 004 Safeguarded Wharves in proximity to Robins Wharf (Kent Minerals and Waste Local Plan 2021-2030)

1 INTRODUCTION

- 1.1 This report has been prepared in accordance with instructions from Northfleet Central 1 Limited to prepare a minerals infrastructure assessment in support of a planning application for proposed mixed use development on land at Northfleet, Swanscombe, Kent.
- 1.2 The area subject to a proposal for mixed use development is located within a Minerals Safeguarding area and also encompasses Safeguarded Minerals Infrastructure within the 19 hectare application area in the form of a protected wharf, known as Robins Wharf (drawing ST19719 – 001), and associated readymix concrete and asphalt plants. Where added value plants such as readymix concrete plants and asphalt plants are located in a safeguarded wharf, those plants are also afforded the protection of safeguarding during the life of the safeguarded host facility.
- 1.3 Kent County Council has confirmed during pre-application discussions with the developer that a mineral resource assessment is not required. Given the current urban nature of the proposed development site, safeguarded minerals have been addressed in the Planning Statement rather than in a separate report on the basis that the site's location within the designated Urban Area nullifies the designation. Consequently, the scope of this report is limited to a mineral infrastructure assessment only.

Site location

- 1.4 The site, consisting of some 19 ha includes Robins Wharf, albeit part of the landing crane and the actual landing stage are not included, and is located approximately 1.5km north-east of Swanscombe. The site is shown on drawing ST19719 – 002. Existing access to Robins Wharf is via Grove Road off the A226 London Road.

Proposed Development Site in Relation to robins Wharf

- 1.5 The proposed development site is bound to the northwest by Lower Road and the Northfleet Industrial Estate and to the southeast by Grove Road. To the south, the site straddles the A266 and is bounded by the railway (as shown on drawing ST19719 – 001). To the north, the boundary extends to the River Thames and includes Robins Wharf. The protected wharf and associated plant extends to approximately 3.85 ha of the total site area.

Description of Development

- 1.6 An Outline planning application with all matters reserved (apart from access into and out of the site) to allow the demolition of all existing buildings and structures and the phased construction of a mixed use development comprising residential units, a hotel, a new football stadium with associated business and leisure facilities, a range of commercial, business and service uses including retail and food and beverage uses, community uses and a range of sui generis uses, with associated public realm and hard and soft landscaping, highways works, car parking, access and servicing arrangements, infrastructure and ancillary works and associated works.

2 SITE DESCRIPTION

Mineral Operators

- 2.1 Robins Wharf is occupied by Brett Aggregates and Aggregate Industries. For the purpose of this report both parties shall be referred to jointly as the “Operator”. The wharf is a shared facility jointly used by the Operator for the importation of aggregates for direct sale or supply into added value products. At this location the Operator’s tenants, CPI Mortars and North Kent Roadstone, produce readymix concrete and asphalt for sale into local markets.
- 2.2 Aggregates, concrete and asphalt are transported to the end user by Heavy Goods Vehicles which utilise the local and strategic road network to arrive at their location.

Wharf Throughput and Capacity

- 2.3 Kent County Council’s Local Aggregate Assessment 2021 confirms that the County has a total of 11 safeguarded wharves (drawing ST19719 – 003) under Policy CSM6 of the Kent Minerals and Waste Local Plan, of which 9 are active/semi active. Albeit Policy CSM 6 lists 12 safeguarded wharves.
- 2.4 Data obtained from the Port of London Authority Terminal Maps (see Table 1) indicates that all wharves in proximity to Robins Wharf (see drawing ST19719 – 004) have similar characteristics in terms of the number of available berths, between 1 and 2, access to the surrounding highway and motorway network. Robins Wharf is one of only two wharves with a length of 100m, the other wharves range in length from 149m to 298m.

2.5 Wharf capacity in adjoining Counties falls outside the scope of this assessment which relates purely to wharf capacity in Kent.

Wharf	Berths	Length	Depth of Water (MHWS)	Access	Material
Robins Wharf	1	100m	9.01m	A2/M25	Aggregates
Northfleet Wharf	1	100m	10.21m	A2/M2/M25	Aggregates (sand, gravel and marine)
42 North Terminal	1	298m	16.06	A2/M25	Bulk Powder & Cement
Clubb's Marine Terminal	2	100m	11.41	A2/M2/M25	Aggregates (marine)
Johnson's wharf	1	n/a	11.16m	A2/M2/M25	Aggregates (marine)
North Sea Terminal	1	149m	11.4m	A2/M2/M25	Aggregates (marine)
Red Lion Wharf	1	240m	14.06m	A2/M25	Aggregates & Type 1
Tower Wharf	2	200m	17.61m	M25	All products. Aggregates not specified.

Table 1. Wharf characteristics and capacity in proximity to Robins Wharf (source Port of London Authority Terminal Maps)

- 2.6 For reasons of commercial confidentiality, the exact tonnage imported and sales from Robins Wharf is not within the public domain. The document "Marine Aggregates, The Crown Estate Licences Summary of Statistics 2021" provides information on the regional landing statistics via wharves, broken down by region, county and individual wharf. The report states that in 2021 Kent imported 1,694,537 tonnes of marine aggregate via its wharves. This figure is marginally higher than reported in (Table 4), which shows data derived from the County Council's Local Aggregate Assessment 2021. Of that total figure 712,121 tonnes were imported via Northfleet, which includes Northfleet, Robins Wharf and Brett Northfleet.
- 2.7 The importance of safeguarding wharves is highlighted in Kent's Local Aggregate Assessment 2021 given the decreasing reliance on land-won sharp sands and gravels.
- 2.8 The total capacity for aggregate importation per annum according to figures reported in the Kent Local Aggregate Assessment 2021 was 5.6 million tonnes even with the closure of Dunkirk Jetty (the site remains safeguarded), albeit the theoretical capacity is recorded at 7.3 million tonnes. At present, Kent's Local Aggregates Assessment reports wharves to be operating at 54% capacity.
- 2.9 The two aggregates companies that comprise the Operator at Robins Wharf have capacity at other safeguarded locations in Kent. Table 2 lists the safeguarded wharves and the operators. Brett Aggregates operates from 4 out of 12 of the safeguarded wharves, Aggregate Industries from 2.

Wharf Name	Operator
Ridham Dock	Brett and Tarmac
Johnsons Wharf	Lafarge
Robins Wharf	Aggregate Industries and Brett
Clubbs Marine Terminal	Clubb
East Quay, Whitstable	Brett
Red Lion Wharf	Stema Shipping
Ramsgate Port	Brett
Dunkirk Jetty, Weston Docks	Brett
Wharf 42	Lafarge
Northfleet Wharf	CEMEX
Sheerness	Aggregate Industries
Old Sun Wharf*	Fleetmix Ltd.

Table 2. Safeguarded Wharves and Operators (Kent Minerals and Waste Local Plan 2013 to 2030). *Old Sun Wharf – unable to locate any information via Port of London Authority

- 2.10 In terms of length and depth of water, mean high water springs (MHWS), Robins Wharf is at a slight disadvantage over neighbouring wharves with one of the shorter lengths and shallowest MHWS. This will limit the size of vessel and the volume of aggregate capable of being discharged via the wharf. This would suggest that the Northfleet Wharf has a higher capacity for unloading aggregates than Robins Wharf. If imports of aggregates were at say 60:40 split from the total between Northfleet and Robins Wharves, imports at Robins Wharf are estimated to be 284,848 tonnes.
- 2.11 Between Kent's 9 active/semi active (a total of 11 safeguarded wharves under Policy CSM 6) there is sufficient capacity within the County to absorb aggregate imports of ca. 284,848 tonnes resulting from the loss of Robins Wharf as illustrated in Table 3
- 2.12 At current rates of importation via wharves there is surplus capacity to land aggregates of between 2.57 to 3.36 million tonnes (Table 3).

10-Year Aggregate Production (excludes recycled aggregate)	10-Year Average import via Wharves: Crushed Rock, Sand and Gravel*	Kent's Wharf Capacity (million tpa)	Surplus Wharf Capacity (million tpa) at 54% Capacity	Surplus Wharf Capacity (million tpa) if TOTAL Aggregate production was supplied via Wharves
4,537,285	2,524,000	5.6 to 7.3 Mt	2.57 to 3.36 Mt	0.57 to 1.36 Mt

Table 3. Kent's 10-Year average Aggregate Production in tonnes, importation via Wharves, Wharf Capacity and Surplus Capacity. *Note: the figures do not include imports of cement

3 MINERALS PRODUCTION

Source

- 3.1 Kent has demand for soft sand, sharp sand and gravel and hard rock. These materials are supplied from land-won and marine-won sources or imported by road or via wharves and railheads. There are two hard rock quarries in Kent and a number of sharp sand and soft sand quarries.

Supply

- 3.2 Kent County Council's Local Aggregate Assessment 2021 provides the most recent data on the County's demand for and the supply of aggregates. The report states that demand for aggregates is met from both imported aggregate (rail and marine) and land-won sources within the County.
- 3.3 The LAA records 10-year average for total Aggregate Production in Kent (see Table 4); figures given in tonnes. Recycled and secondary aggregates have been excluded for the purpose of this report as it is unlikely that this product would ever be imported via a wharf.

Annual Production	Soft & Sharp Sand & Gravel	Crushed Rock	Marine imports Sand, Gravel land-won & dredged	Marine Imported Crushed Rock	Rail Depot: Sand, Gravel and Crushed Rock	Total
10-Year average	711,118	829,935	1,680,000	844,000	472,232	4,537,285

Table 4. Total Aggregate Production in Kent: 10-year average 2011 to 2020. The figures includes marine won via wharves and land-won and imports via Railhead (source KCC LAA 2021). Recycled aggregates are excluded.

4 IMPACT OF NON MINERAL DEVELOPMENT ON SAFEGUARDED INFRASTRUCTURE

- 4.1 The proposed development includes the demolition of all buildings and structures within the redline boundary (drawing ST19719 – 001). Consequently, this would include the loss of operations concerned with the safeguarded wharf and all of the associated minerals related activity, readymix concrete and asphalt plants. The wharf's landing stage would remain in situ.

5 MINERALS INFRASTRUCTURE GUIDANCE AND POLICY

Guidance

- 5.1 Kent County Council has produced an “Updated Mineral and Waste Safeguarding Supplementary Planning Document” which was adopted in March 2021 and is to be read alongside the Kent Minerals and Waste Local Plan 2013-30 (adopted September 2020). This document sets out how the relevant policies are applied in respect of the safeguarding of minerals infrastructure and land within 250m of safeguarded sites that is subject to a proposal for non-minerals related development. The information requirements for planning applications affecting safeguarded minerals infrastructure are also set out in the SPD.

Policy

- 5.2 The relevant planning policies are contained in the Kent Minerals and Waste Local Plan 2013 to 2030, adopted in 2020 (the MWLP). The MWLP sets out the vision and strategic objectives associated with minerals supply developments in Kent.
- 5.3 The MWLP includes strategies for mineral planning and use-specific policies to deliver those strategies, together with generic development management policies against which proposals for minerals development will be assessed. Local Planning Authorities consult the Minerals Planning Authority (Kent County Council) in respect of any non-minerals related proposal for development that may adversely affect the operation of a safeguarded facility.
- 5.4 “Policy CSM 6: Safeguarded Wharves and Rail depots”, which is attached in full at Appendix 1, states that proposals for non-minerals development will not be permitted should said development adversely affect safeguarded minerals infrastructure facilities. Robins Wharf, Northfleet is identified as a safeguarded site within the policy text.
- 5.5 “Policy CSM 7: Safeguarding Other Mineral Plant Infrastructure”, which is attached in full at Appendix 2, states that added value plant such as concrete and coated materials plant are safeguarded for ongoing use where situated in a safeguarded wharf for the life of the host site. The Operators Tenant’s readymix concreting plant and asphalt plant are therefore safeguarded by Policy CSM7 for the lifetime of Robins Wharf.
- 5.6 “Policy DM 8: Safeguarding Minerals Management, Transportation Production & Waste Management Facilities”, which is attached in full at Appendix 3, states that proposals for development that are incompatible with safeguarded minerals

management facilities will only be granted planning permission where it is demonstrated that either:

- i. the proposal constitutes minor applications; reserved matters, change of use etc; or
- ii. the proposal is allocated in the adopted development plan; or
- iii. a suitable alternative minerals infrastructure site has been identified; or
- iv. the proposed development is for a temporary period; or
- v. the existing facility is not viable; or
- vi. the need for the proposed development overrides the presumption for safeguarding; or
- vii. the capacity of the minerals infrastructure facility to be lost is not required.

5.7 Policy DM8 is clear that only one of the specified criterion needs to be satisfied; they are expressed as being 'either/or' requirements.

Compliance with adopted safeguarding policy

Policy DM 8: Criterion 3 – whether a suitable alternative minerals infrastructure site has been identified

5.8 The scope of this report does not extend to locating replacement sites. The Operator views any replacement as being a single site shared between the two aggregates companies that occupy the site. The Operator would require a replacement site with the same operational potential that exists at Robins Wharf, i.e. a wharf, land for aggregate storage and siting of added value plant.

5.9 The need for a replacement site should therefore be considered against Policy DM 8: Criterion 6 or 7.

5.10 *Policy DM 8: Criterion 6 – whether the need for the proposed development overrides the presumption for safeguarding*

5.11 The demolition of all existing buildings and structures, including Robins Wharf would facilitate the construction of a significant mixed use development. This development would comprise of residential units, a hotel, a new football stadium with associated business and leisure facilities, a range of commercial, business and service uses including retail and food and beverage uses, community uses and a range of sui generis uses, with associated public realm and hard and soft landscaping, highways works, car parking, access and servicing arrangements, infrastructure and ancillary works and associated works.

5.12 The socio-economic assessment of the proposed scheme has identified a number of benefits arising from the scheme, which are in addition to the much needed supply of housing given the Council's undersupply and pressures within north-Kent arising from nitrate neutrality matters. The benefits of the proposed development are discussed further within the planning statement accompanying the application, but are in summary:

- During construction, the Proposed Development is expected to generate at least:
 - o 6,755 person years of employment
 - o ...which is equivalent to an average of 846 Full Time Equivalent jobs sustained for the entire duration of the build (estimated at 8 years)
 - o An additional 820 indirect and induced jobs (FTE) – created / supported within the construction supply chain and in the wider economy for the duration
 - o Approx. 120 apprenticeship starts and other on-the-job training opportunities
 - o £429m in Gross Value Added for the regional economy
- On completion, it is expected to generate a minimum of:
 - o 2,250 direct jobs across a wide range of sectors – a net increase of around 1,750 on the estimated number of jobs currently based on site
 - o 925 net additional jobs for local (Gravesham) residents, taking into account leakage, displacement and multiplier effects
 - o £69m per annum in additional local (Gravesham) GVA
 - o £20m per annum in resident retail and leisure expenditure
 - o £5.6m per annum in additional council tax receipts, plus an uplift of c. £1.1m per annum in business rates compared with existing uses

5.13 It is anticipated that the proposed development would provide significant benefits to the area and local communities, including funding for school places, Health Service, the regeneration and improvement of public spaces and access affordable and family housing. Consequently, the benefits of the proposed development should be carefully weighed against Policy DM 8: Criterion 6.

5.14 *Policy DM 8: Criterion 7 – whether the capacity of the minerals infrastructure facility to be lost is required*

5.15 There are a number of wharves in close proximity to Robins Wharf, listed in Table 1 of this document. In the absence of published importation and sales figures for this

facility, it is not possible to determine the exact proportion of aggregate imported and its importance and individual contribution to the overall tonnage of aggregate imported via Kent's safeguarded wharves. However, it is clear from the County Council's Local Aggregate Assessment that the wharves within Kent are operating at a level far from total productive capacity. Based upon the available records which identifies that there is circa 46% capacity within the wharfs in Kent, it is expected that the loss of the individual site capacity of Robins Wharf can be accommodated by the other safeguarded facilities within close proximity.

6 CONCLUSION

- 6.1 The proposed non-minerals development would include the total loss of all mineral facilities at Robins Wharf.
- 6.2 The proposal should be considered against Policy DM8, and specifically in this case against criteria 6 and 7 (as assessed in this Minerals Impact Assessment). A full exposition of the need for the development and the benefits arising from it is contained within the Planning Statement submitted in support of the application. This, coupled with the significant underused capacity evidenced in the other safeguarded wharves nearby, demonstrates that the need for development should override the presumption for safeguarding. Accordingly, the proposal would accord with both criteria 6 and 7 within Policy DM8 albeit the policy wording is clear that the proposal need only satisfy any one criterion.

APPENDICES

Appendix 1: Policy CSM 6: Safeguarded Wharves and Rail depots

Policy CSM 6

Safeguarded Wharves and Rail Depots

Planning permission will not be granted for non-minerals development that may unacceptably adversely affect the operation of existing,⁽⁶⁷⁾ planned or potential sites, such that their capacity or viability for minerals transportation purposes may be compromised.

The following sites, and the allocated sites included in the Minerals Sites Plan, are safeguarded:

1. Allington Rail Sidings
2. Sevington Rail Depot
3. Hothfield Works
4. East Peckham
5. Ridham Dock (both operational sites)
6. Johnson's Wharf, Greenhithe
7. Robins Wharf, Northfleet (both operational sites)
8. Clubbs Marine Terminal, Gravesend
9. East Quay, Whitstable
10. Red Lion Wharf, Gravesend
11. Ramsgate Port
12. Wharf 42, Northfleet (including Northfleet Cement Wharf)
13. Dunkirk Jetty (Dover Western Docks)
14. Sheerness
15. Northfleet Wharf
16. Old Sun Wharf, Gravesend

67 Existing sites are taken as sites that have permanent planning permission for minerals transportation purposes.

Their locations are shown in Figure 13: Minerals Key Diagram in Chapter 2 and their site boundaries are shown in Chapter 9: Adopted Policies Maps.

The Local Planning Authorities will consult the Minerals Planning Authority and take account of its views before making a planning decision (in terms of both a planning application and an allocation in a local plan) for non-mineral related development (other than that of the type listed in policy DM 8 (clause 1) on all development proposed at, or within 250m of, safeguarded minerals transportation facilities.

5.7 Policy CSM 7: Safeguarding Other Mineral Plant Infrastructure

5.7.1 National policy requires other types of mineral infrastructure to be safeguarded. This includes existing, planned and potential sites for concrete batching, the manufacture of coated materials, other concrete products and the handling, processing and distribution of substitute, recycled and secondary aggregate materials.

5.7.2 As there are many sites within the county, with considerable numbers being located on industrial estates identified in local plans for general industrial and commercial uses, a generic (non-site specific) policy for safeguarding these facilities and their ongoing, overall capacities is necessary. Policy CSM 7 addresses the need to safeguard mineral production infrastructure, while being flexible to the needs of the industry by enabling the loss of capacity (potentially required for the industry to remain competitive and viable) provided there is replacement capacity available elsewhere of a type that is at least equal to that provided by the original facility. Policy DM 8 identifies situations where development at, or in proximity to safeguarded mineral plant infrastructure would be acceptable.

Policy CSM 7

Safeguarding Other Mineral Plant Infrastructure

Facilities for concrete batching, the manufacture of coated materials, other concrete products and the handling, processing and distribution of substitute, recycled and secondary aggregate material in Kent are safeguarded for their on-going use. Where these facilities are situated within a host quarry, wharf or rail depot facility, they are safeguarded for the life of the host site.

Where other development is proposed at, or within 250m of, safeguarded minerals plant infrastructure, Local Planning Authorities will consult the Minerals Planning Authority and take account of its views before making a planning decision (in terms of both a planning application and an allocation in a local plan).

Appendix 2: Policy DM 8: Safeguarding Minerals Management, Transportation Production & waste Management Facilities

Their locations are shown in Figure 13: Minerals Key Diagram in Chapter 2 and their site boundaries are shown in Chapter 9: Adopted Policies Maps.

The Local Planning Authorities will consult the Minerals Planning Authority and take account of its views before making a planning decision (in terms of both a planning application and an allocation in a local plan) for non-mineral related development (other than that of the type listed in policy DM 8 (clause 1) on all development proposed at, or within 250m of, safeguarded minerals transportation facilities.

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Policy CSM 7

Safeguarding Other Mineral Plant Infrastructure

Facilities for concrete batching, the manufacture of coated materials, other concrete products and the handling, processing and distribution of substitute, recycled and secondary aggregate material in Kent are safeguarded for their on-going use. Where these facilities are situated within a host quarry, wharf or rail depot facility, they are safeguarded for the life of the host site.

Where other development is proposed at, or within 250m of, safeguarded minerals plant infrastructure, Local Planning Authorities will consult the Minerals Planning Authority and take account of its views before making a planning decision (in terms of both a planning application and an allocation in a local plan).

Appendix 3: Policy CSM 7: Safeguarding Other Mineral Plant Infrastructure

Policy DM 8

Safeguarding Minerals Management, Transportation Production & Waste Management Facilities

Planning permission will only be granted for development that is incompatible with safeguarded minerals management, transportation or waste management facilities, where it is demonstrated that either:

1. it constitutes development of the following nature: advertisement applications; reserved matters applications; minor extensions and changes of use and buildings; minor works; and non-material amendments to current planning permissions; or
2. it constitutes development on the site that has been allocated in the adopted development plan where consideration of the other criteria (1, 3-7) can be demonstrated to have taken place in formulation of the plan and allocation of the site which concluded that the safeguarding of minerals management, transportation production and waste management facilities has been fully considered and it was concluded that certain types non-mineral and waste development in those locations would be acceptable; or
3. replacement capacity, of the similar type, is available at a suitable alternative site, which is at least equivalent or better than to that offered by the facility that it is replacing; or
4. it is for a temporary period and will not compromise its potential in the future for minerals transportation; or
5. the facility is not viable or capable of being made viable; or
6. material considerations indicate that the need for development overrides the presumption for safeguarding; or
7. It has been demonstrated that the capacity of the facility to be lost is not required.

Replacement capacity must be at least equivalent in terms of tonnage, accessibility, location in relation to the market, suitability, availability of land for processing and stockpiling of waste (and materials/residues resulting from waste management processes) and minerals, and:

- in the case of wharves, the size of the berth for dredgers, barges or ships
- in the case of waste facilities, replacement capacity must be at least at an equivalent level of the waste hierarchy and capacity may be less if the development is at a higher level of the hierarchy

There must also be no existing, planned or proposed developments that could constrain the operation of the replacement site at the required capacity.

Planning applications for development within 250m of safeguarded facilities need to demonstrate that impacts, e.g. noise, dust, light and air emissions, that may legitimately arise from the activities taking place at the safeguarded sites would not be experienced to an unacceptable level by occupants of the proposed development and that vehicle access to and from the facility would not be constrained by the development proposed.

Further guidance on the application of this policy will be included in a Supplementary Planning Document.

7.7 Policy DM 9: Prior Extraction of Minerals in Advance of Surface Development

7.7.1 When development is proposed within an MSA, promoters will be encouraged to extract the mineral in advance of the main development. Policy DM 9 aims to manage situations where built development located on a safeguarded mineral resource is to be permitted, so as to avoid the needless sterilisation of economic mineral resources (in accordance with Policy DM 7).

Policy DM 9

Prior Extraction of Minerals in Advance of Surface Development

Planning permission for, or incorporating, mineral extraction in advance of development will be granted where the resources would otherwise be permanently sterilised provided that:

1. the mineral extraction operations are only for a temporary period; and,
2. the proposal will not cause unacceptable adverse impacts to the environment or communities

Where planning permission is granted for the prior extraction of minerals, conditions will be imposed to ensure that the site can be adequately restored to a satisfactory after-use should the main development be delayed or not implemented.

7.8 Policy DM 10: Water Environment

7.8.1 Minerals and waste development can have significant impacts on flooding and water quantity and water quality. In Kent there are many catchments where there is little or no water available for abstraction during dry periods. Pressures are particularly notable in Kent as it is one of the driest parts of England and Wales, coupled with high population density and household water use (see Figure 21). Areas of mineral excavation

Appendix 4: Marine Aggregates The Crown Estate Licences Summary of Statistics 2021

MARINE AGGREGATES

THE CROWN ESTATE LICENCES

SUMMARY OF STATISTICS 2021

I N D E X

	Page	Confidentiality Rating
Accompanying Notes	1	NC
Summary 2021	2	NC
Summary of Regional Landing Statistics	3-11	NC
Delivery by region/country	12	NC
Reserves and Resources	13	NC
Summary of National Landing Statistics	14-15	NC
Summary of County Landing Statistics	16	NC
Official Port Listings	17-18	NC

NC Non confidential

ACCOMPANYING NOTES

1. These statistics refer to removal of sand and gravel from the bed of the English and Welsh Territorial Sea and Continental Shelf, under licence from The Crown Estate Commissioners. Removals from areas not in The Crown Estate ownership are not included in these statistics, nor are dredged materials removed purely for navigational reasons and not used beneficially.
2. All the statistics relate to royalty returns for the 2021 calendar year.
3. All permitted and actual extraction figures are expressed in metric tonnes. A conversion factor of 1.73 for aggregate and 1.5 for sand, has been applied where necessary, to convert cubic metres to metric tonnes.
4. The reported permitted removal tonnages shown within this report refers to the tonnage permitted within The Crown Estate production agreement. This is correct as at 31 December 2021.
5. The tonnages exclude corrections relating to late declarations and those identified during the audits.
6. The regional landing statistics totals will not equate to the amount dredged from each region, due to the presence of the export market and movement of aggregate to meet differing home market demands.
7. The county landing statistics for England are based on ceremonial counties and preserved counties for Wales.
8. An Official Port Listing is included (pages 17-18), which illustrates the individual landing locations (current and historic) and the standard name used within this document.

Summary 2021

1. Regional Dredging Statistics

Licences to Dredge Marine Minerals

Dredging Area	Permitted Removal * ¹	Primary Aggregates	Rivers and Miscellaneous	Secondary Aggregates		Total Removal
				Beach Nourishment	Reclamation Fill	
Humber	6,875,000	3,502,998	-	739,196	-	4,242,194
East Coast	7,125,000	3,304,010	-	-	-	3,304,010
Thames Estuary	3,800,000	1,601,306	-	515,639	-	2,116,945
East English Channel	9,916,667	4,483,312	-	103,925	-	4,587,237
South Coast	8,125,000	3,986,079	-	1,657	-	3,987,736
South West	3,049,998	1,433,749	-	24,338	-	1,458,087
North West	1,100,000	257,360	-	671,861	-	929,221
Total	39,991,665	18,568,814	-	2,056,616	-	20,625,430

2. Regional Landing Statistics

Humber / North East	1,056,272
East Coast	221,500
Thames Estuary	8,214,791
East English Channel	488,302
South Coast	2,586,312
South West	1,429,624
North West	257,360
Export	4,314,653
Primary Aggregates Total	18,568,814
Beach Nourishment / Reclamation Fill / Rivers and Misc	2,056,616
TOTAL LANDED	20,625,430

3. National Landing Statistics - Primary Aggregate

England	13,554,487
Wales	699,674
Belgium	1,582,030
France	146,069
Netherlands	2,586,554

Primary Aggregates Total	18,568,814
---------------------------------	-------------------

*¹ Relates to Average Annual Tonnages (total tonnage / term). This does not include specific permitted tonnages for Secondary Aggregates only.

Tonnages exclude corrections. See note 5 on page 1.

The Humber region

Landing locations

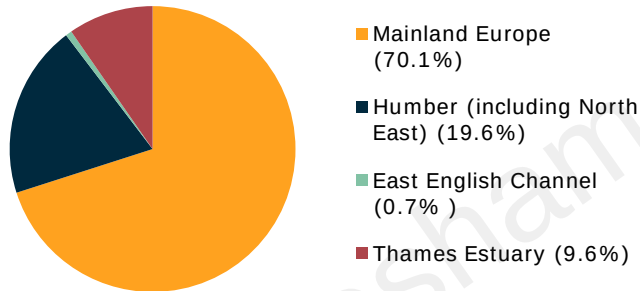
Blyth	17,186
River Humber Wharves	290,341
River Tees Wharves	430,688
River Tyne Wharves	318,057

Humber / North East total

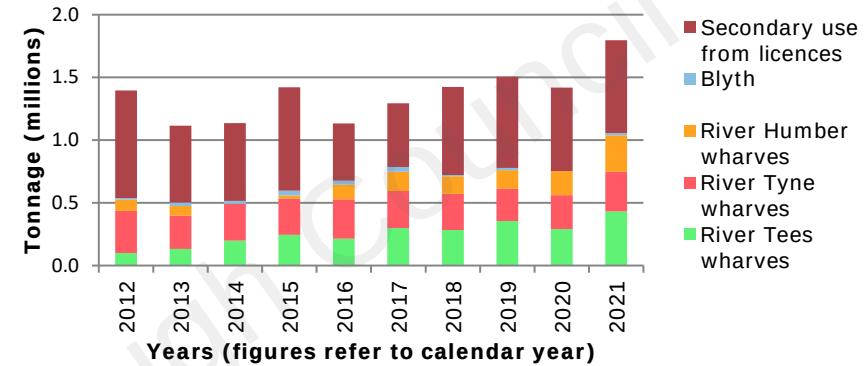
2021 tonnages

17,186
290,341
430,688
318,057
1,056,272

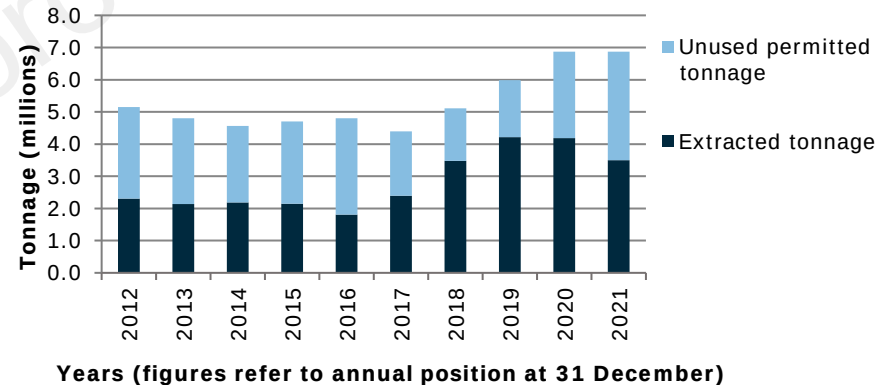
During 2021 material extracted from the region was delivered to:



Delivery of marine aggregates to the region



Permitted and extracted tonnage



6.88

million tonnes can be extracted from **10 licences** annually *

19

Current estimates suggest there are **19 years** of primary aggregate production permitted *

1

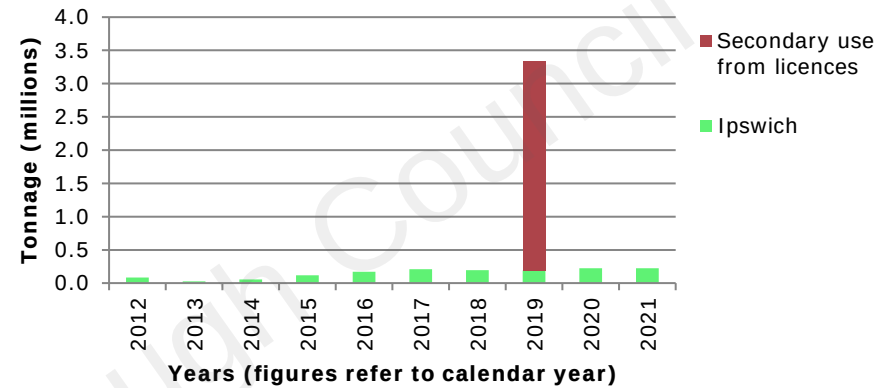
Current application for a licence could, if approved **increase** the permitted tonnage by **0.5 million tonnes** *

* As at April 2022

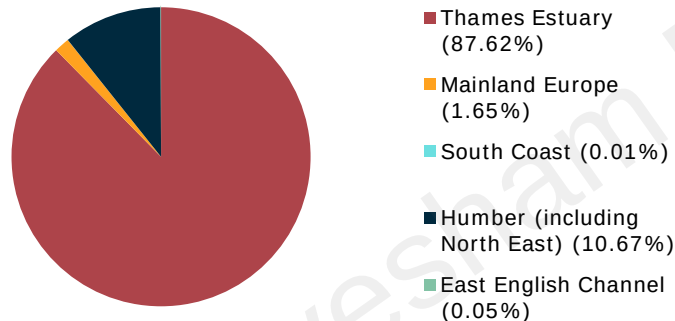
The East Coast region

Landing locations	2021 tonnages
Ipswich	221,500
East Coast total	221,500

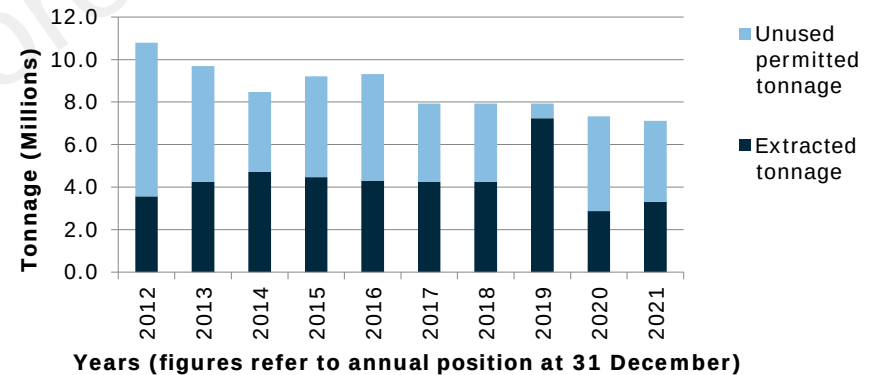
Delivery of marine aggregates to the region



During 2021 material extracted from the region was delivered to:



Permitted and extracted tonnage



7.13

million tonnes can be extracted from **11** licences annually *

11

Current estimates suggest there are **11 years** of primary aggregate production permitted *

1

Current application for a licence could, if approved **increase** the permitted tonnage by **0.65 million tonnes** annually *

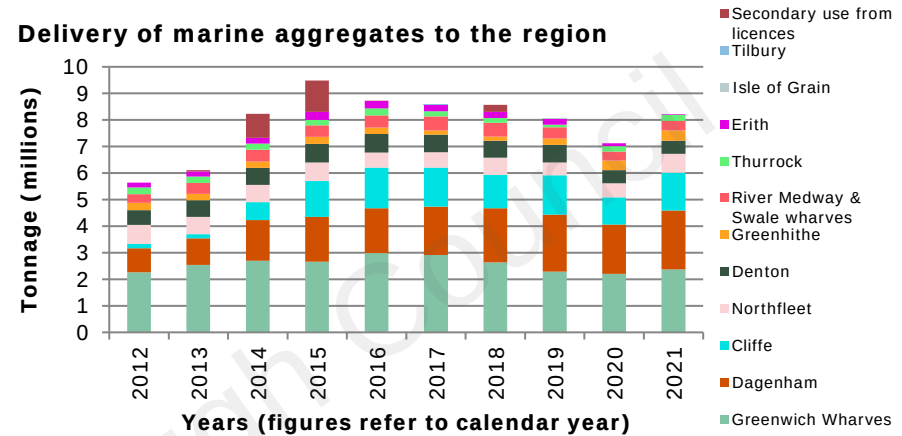
* As at April 2022

The Thames region

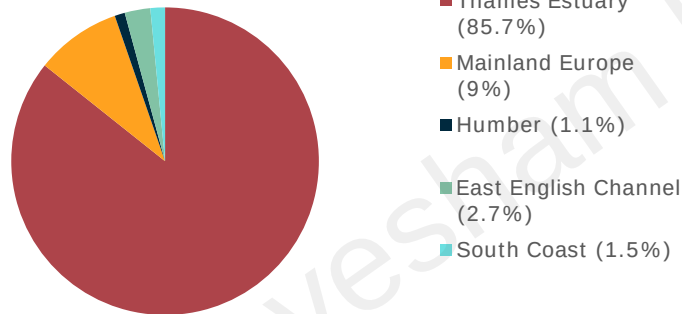
Landing locations 2021 tonnages

Cliffe	1,417,867
Dagenham	2,214,092
Denton	496,693
Erith	19,066
Greenwich Wharves	2,376,516
Greenhithe	386,445
Northfleet	712,121
River Medway Wharves	321,155
Swale Wharves	37,713
Thurrock	233,123
Thames Estuary total	8,214,791

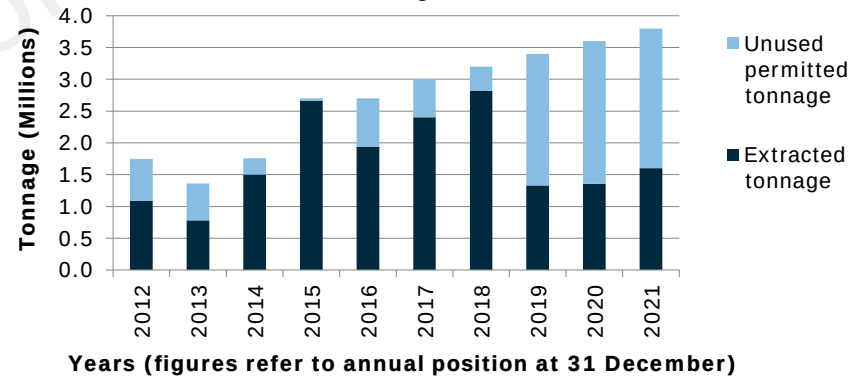
Delivery of marine aggregates to the region



During 2021 material extracted from the region was delivered to:



Permitted and extracted tonnage



4.4

million tonnes can be extracted from **8 licences** annually *

28

Current estimates suggest there are **28 years** of primary aggregate production permitted *

2

Current application for a licence could, if approved **increase** the permitted tonnage by **1.3 million tonnes** annually *

* As at April 2022

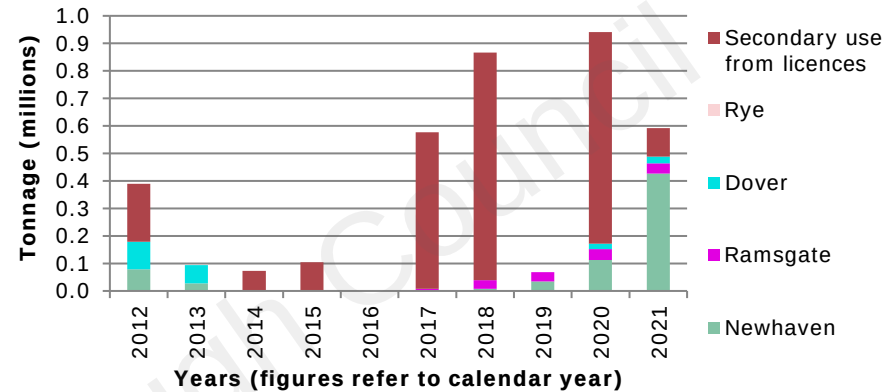
The East English Channel region

Landing locations 2021 tonnages

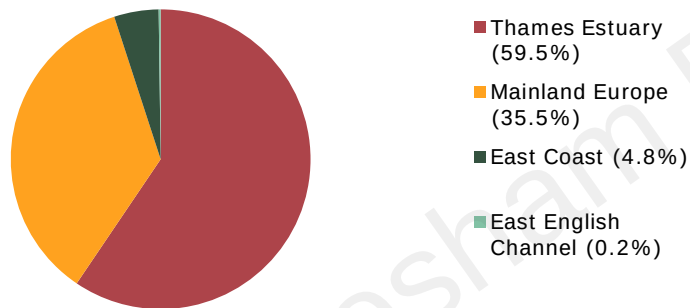
Dover	24,820
Newhaven	426,738
Ramsgate	36,744

East English Channel total **488,302**

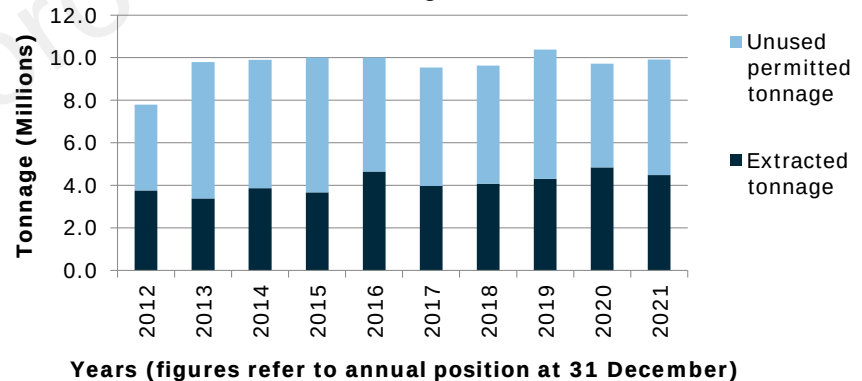
Delivery of marine aggregates to the region



During 2021 material extracted from the region was delivered to:



Permitted and extracted tonnage



9.92

million tonnes can be extracted from **10 licences** annually *

24

Current estimates suggest there are **24 years** of primary aggregate production permitted *

5

Current application for a licence could, if approved **increase** the permitted tonnage by **4.1 million tonnes** annually*

* As at April 2022

The South Coast region

Landing locations

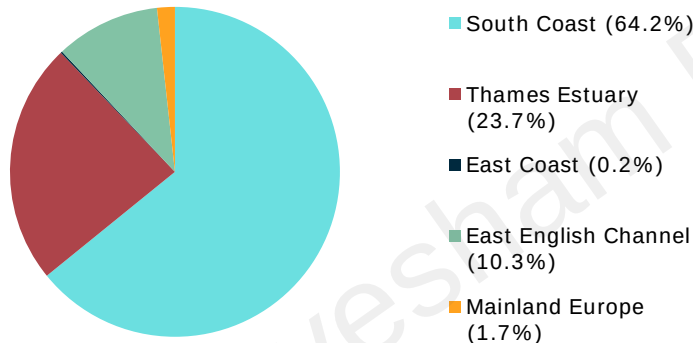
2021 tonnages

Cowes	65,697
Langstone Harbour Wharves	448,029
Poole	104,659
Shoreham Harbour Wharves	1,078,498
Southampton Wharves	889,429

South Coast total

2,586,312

During 2021 material extracted from the region was delivered to:



8.13

million tonnes can be extracted from **16** licences annually *

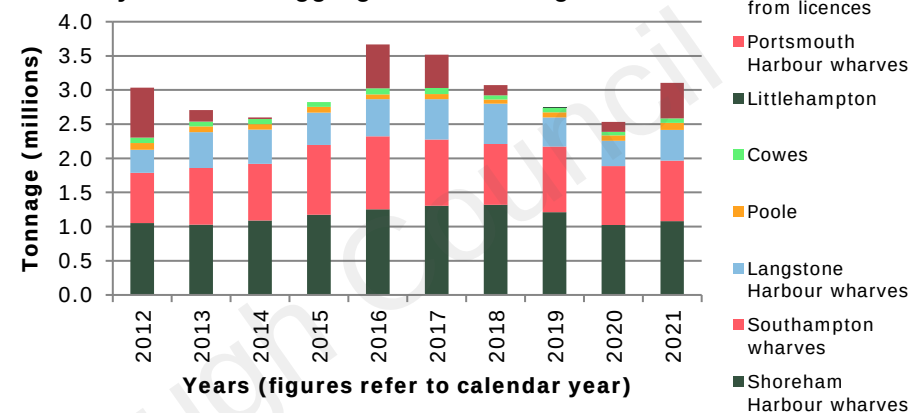
22

Current estimates suggest there are **22 years** of primary aggregate production permitted *

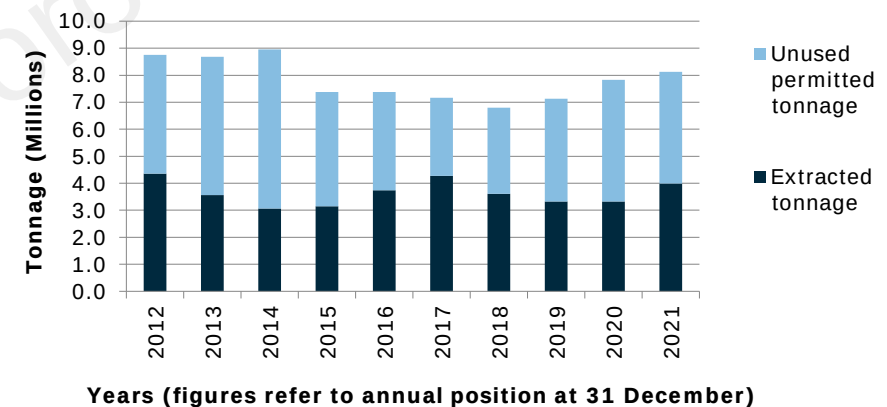
0

There are currently **no applications** for new licences on the South Coast *

Delivery of marine aggregates to the region



Permitted and extracted tonnage



* As at April 2022

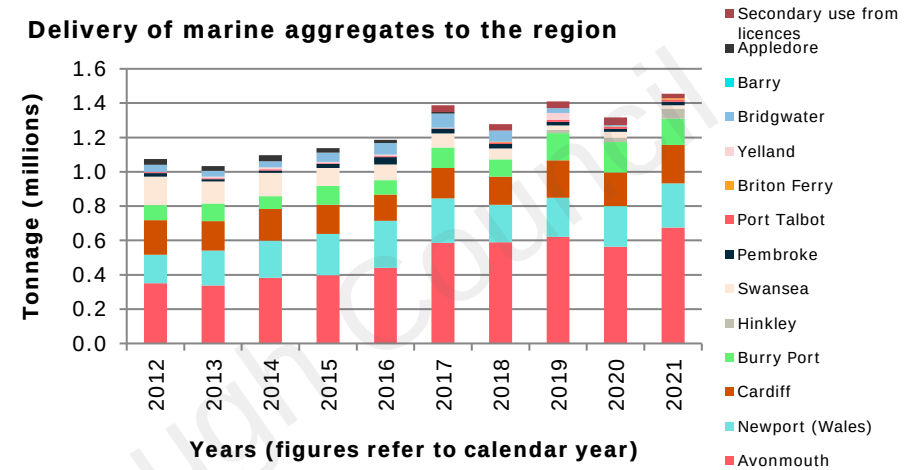
The South West region

Landing locations 2021 tonnages

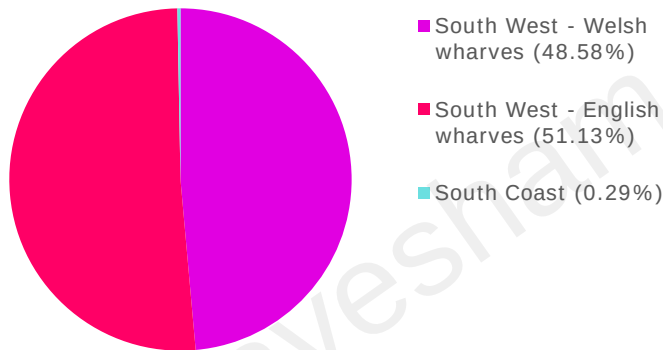
Avonmouth	675,317
Briton Ferry	7,781
Burry Port	152,471
Cardiff	222,873
Hinkley	57,755
Newport	258,202
Pembroke	20,318
Port Talbot	14,113
Swansea	20,794

South West total **1,429,624**

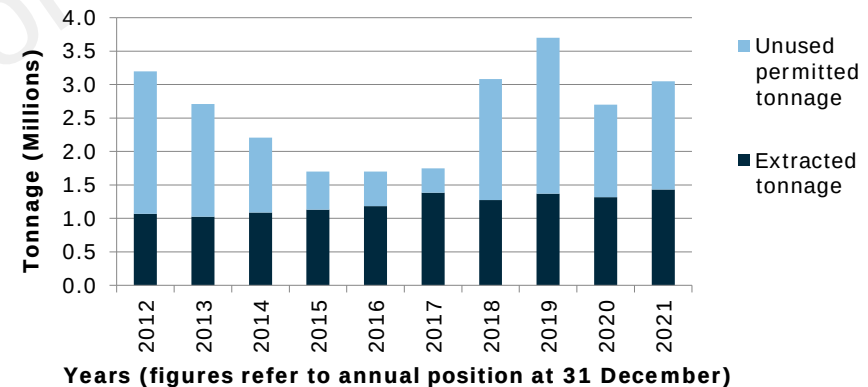
Delivery of marine aggregates to the region



During 2021 material extracted from the region was delivered to:



Permitted and extracted tonnage



3.05

million tonnes can be extracted from **9** licences annually *

27

Current estimates suggest there are **27 years** of primary aggregate production permitted *

0

There are currently **no applications** for new licences on the South Coast *

* As at April 2022

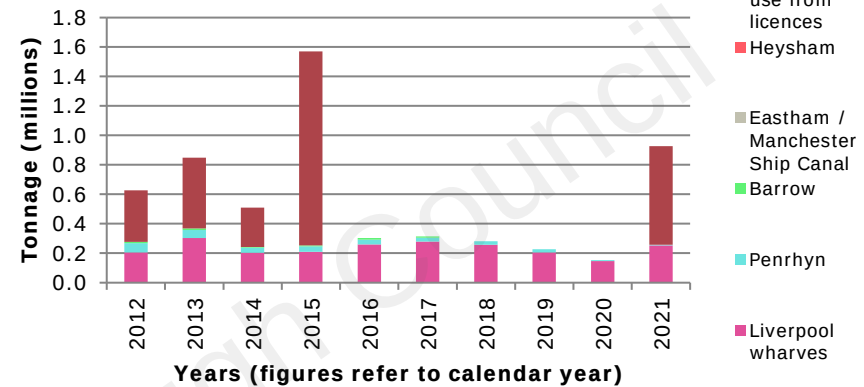
The North West region

Landing locations 2021 tonnages

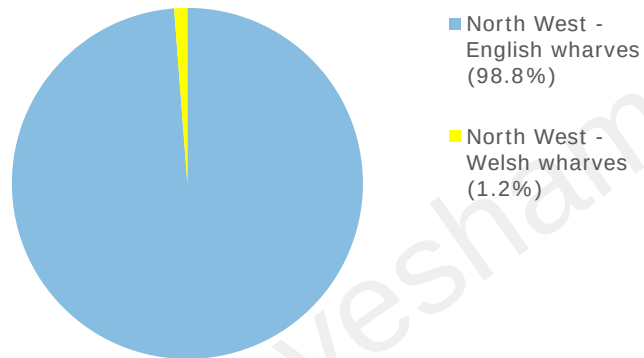
Liverpool Wharves	254,238
Penrhyn	3,122

North West total **257,360**

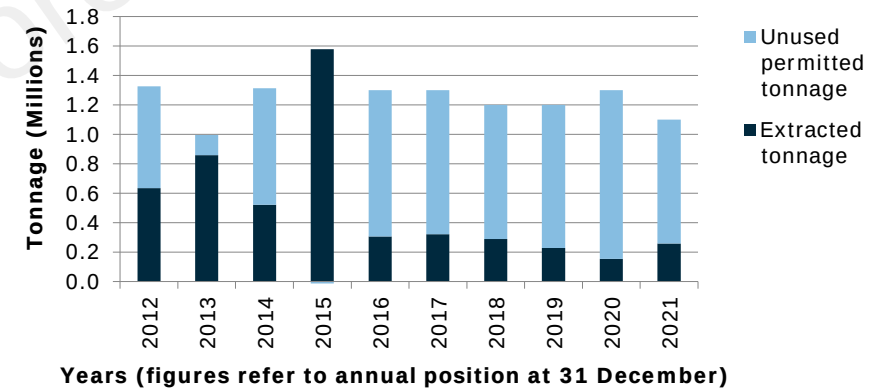
Delivery of marine aggregates to the region



During 2021 material extracted from the region was delivered to:



Permitted and extracted tonnage



1.10

million tonnes can be extracted from **2 licences** annually *

34

Current estimates suggest there are **34 years** of primary aggregate production permitted *

1

Current application for a licence could, if approved **increase** the permitted tonnage by **0.5 million tonnes** annually*

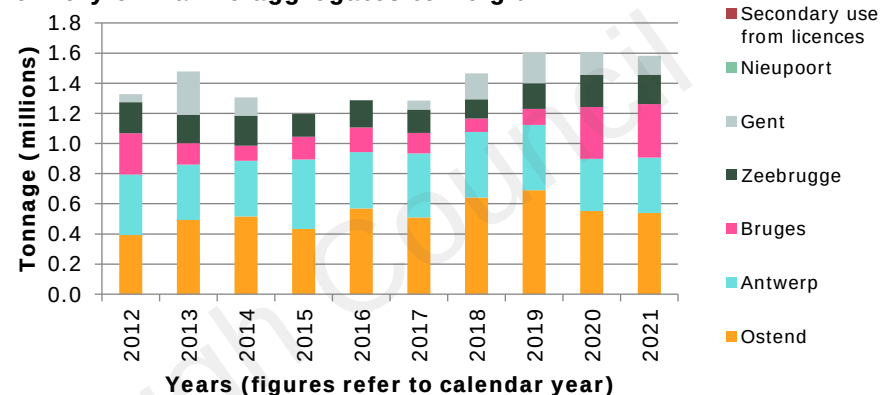
* As at April 2022

Exports

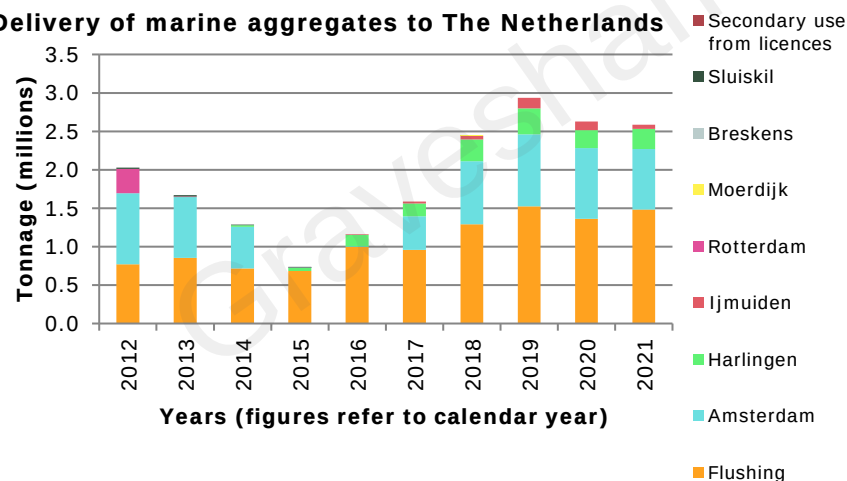
Landing locations 2021 tonnages

Amsterdam	789,906
Antwerp	368,745
Boulogne	19,084
Bruges	355,116
Dunkirk	102,397
Gent	126,128
Harlingen	261,532
Ijmuiden	54,162
Le Havre	855
Ostend	538,111
River Seine Wharves	23,733
Vlissingen	1,480,954
Zeebrugge	193,930
Export Total	4,314,653

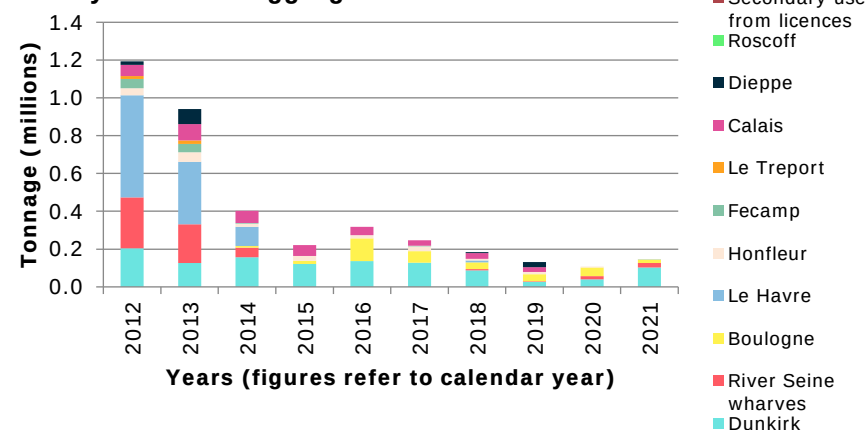
Delivery of marine aggregates to Belgium



Delivery of marine aggregates to The Netherlands



Delivery of marine aggregates to France



Secondary use aggregate

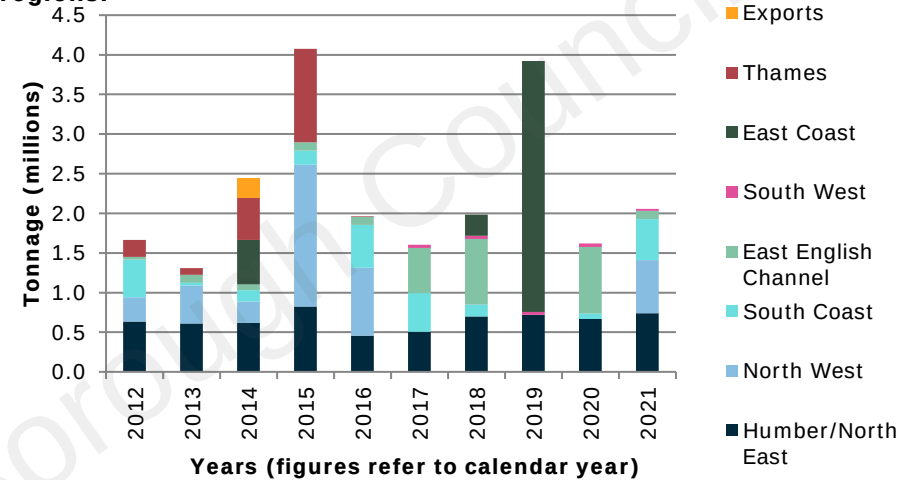
Beach nourishment/reclamation fill/rivers and miscellaneous

Landing locations 2021 tonnages

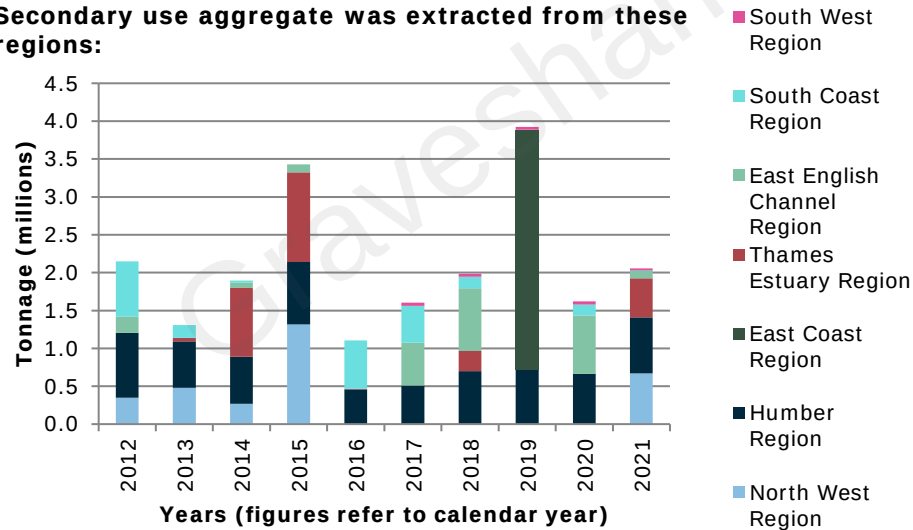
Bournemouth	515,639
Bramley Moore Docks	670,664
Lincshore	739,196
Lydd	103,925
Southsea	1,657
Yelland	25,535

Beach Nourishment Total **2,056,616**

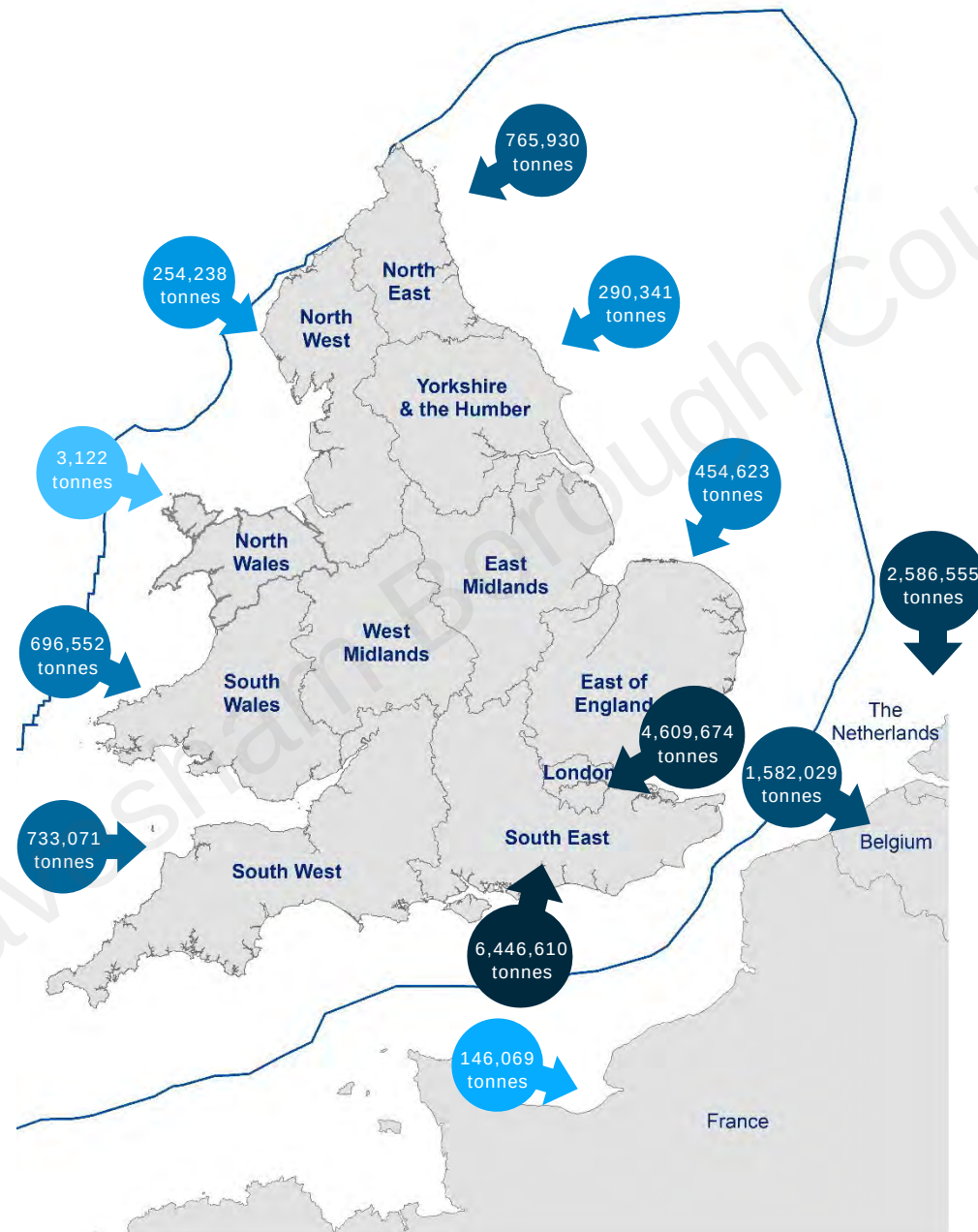
Secondary use aggregate was delivered to these regions:



Secondary use aggregate was extracted from these regions:



Delivery by region / country



Reserves and Resources

Region	Total current primary reserves	10-year average annual offtake	3-year average annual offtake	Peak annual offtake during 10-year period*	Annual permitted offtake (as March 2022)	Regional reserve life @ 10-year average annual offtake
		Primary (construction aggregate)				
Humber	41.88	2.24	3.51	3.52	6.87	18.69
East Coast	44.37	4.01	3.42	4.72	7.12	11.07
Thames Estuary	38.19	1.37	1.43	1.94	3.80	27.77
East English Channel	95.60	3.98	4.28	4.65	9.92	24.03
South Coast	75.97	3.39	3.50	3.99	8.13	22.44
South West	32.55	1.22	1.36	1.43	3.05	26.62
North West	9.28	0.27	0.21	0.38	1.10	34.00
TOTAL	337.84	16.48	17.71	18.10	39.99	20.50

All figures are in millions of tonnes
 *Totals are national peaks, not the sum of regional figures

Reserves and Resource

The PERC code defines “**reserves**” as the proportion of a mineral “**resource**” that can be mined for economic purposes

21

Current national estimates suggest there are **21 years** of primary marine aggregate production permitted

338

Million tonnes estimated national primary reserve

**SUMMARY OF NATIONAL LANDING STATISTICS
FOR MARINE DREDGED PRIMARY AGGREGATES - 2021**

Landing Locations		2021 Tonnage
England	Avonmouth	675,317
	Blyth	17,186
	Cliffe	1,417,867
	Cowes	65,697
	Dagenham	2,214,092
	Denton	496,693
	Dover	24,820
	Erith	19,066
	Greenhithe	386,445
	Greenwich Wharves	2,376,516
	Hinkley	57,755
	Ipswich	221,500
	Langstone Harbour Wharves	448,029
	Liverpool Wharves	254,238
	Newhaven	426,738
	Northfleet	712,121
	Poole	104,659
	Ramsgate	36,744
	River Humber Wharves	290,341
	River Medway Wharves	321,155
	River Tees Wharves	430,688
	River Tyne Wharves	318,057
	Shoreham Harbour Wharves	1,078,498
	Southampton Wharves	889,429
	Swale Wharves	37,713
	Thurrock	233,123
England Total		13,554,487
Wales	Briton Ferry	7,781
	Burry Port	152,471
	Cardiff	222,873
	Newport (Wales)	258,202
	Pembroke	20,318
	Penrhyn	3,122
	Port Talbot	14,113
	Swansea	20,794
Wales Total		699,674

**SUMMARY OF NATIONAL LANDING STATISTICS
FOR MARINE DREDGED PRIMARY AGGREGATES - 2021**

Landing Locations		2021 Tonnage
Belgium	Antwerp	368,745
	Bruges	355,116
	Gent	126,128
	Ostend	538,111
	Zeebrugge	193,930
Belgium Total		1,582,030
France	Boulogne	19,084
	Dunkirk	102,397
	Le Havre	855
	River Seine Wharves	23,733
France Total		146,069
Netherlands	Amsterdam	789,906
	Harlingen	261,532
	Ijmuiden	54,162
	Vlissingen	1,480,954
Netherlands Total		2,586,554
Total		18,568,814

**SUMMARY OF COUNTY LANDING STATISTICS
FOR MARINE DREDGED PRIMARY AGGREGATES - 2021**

LANDING LOCATIONS		2021 Tonnage
ENGLAND	Bristol	675,317
	Dorset	104,659
	East Riding of Yorkshire	260,655
	East Sussex	823,835
	Essex	233,123
	Greater London	4,609,674
	Hampshire	1,337,458
	Isle of Wight	65,697
	Kent	1,694,537
	Lincolnshire	29,685
	Medway	1,739,022
	Merseyside	254,238
	Middlesbrough	9,208
	North Yorkshire	421,480
	Northumberland	17,185
	Somerset	57,755
	Suffolk	221,500
	Tyne & Wear	318,057
	West Sussex	681,402
England Total		13,554,487
WALES	Carmarthenshire	152,471
	Gwent	258,202
	Gwynedd	3,122
	Pembrokeshire	20,318
	South Glamorgan	222,873
	West Glamorgan	42,688
Wales Total		699,674

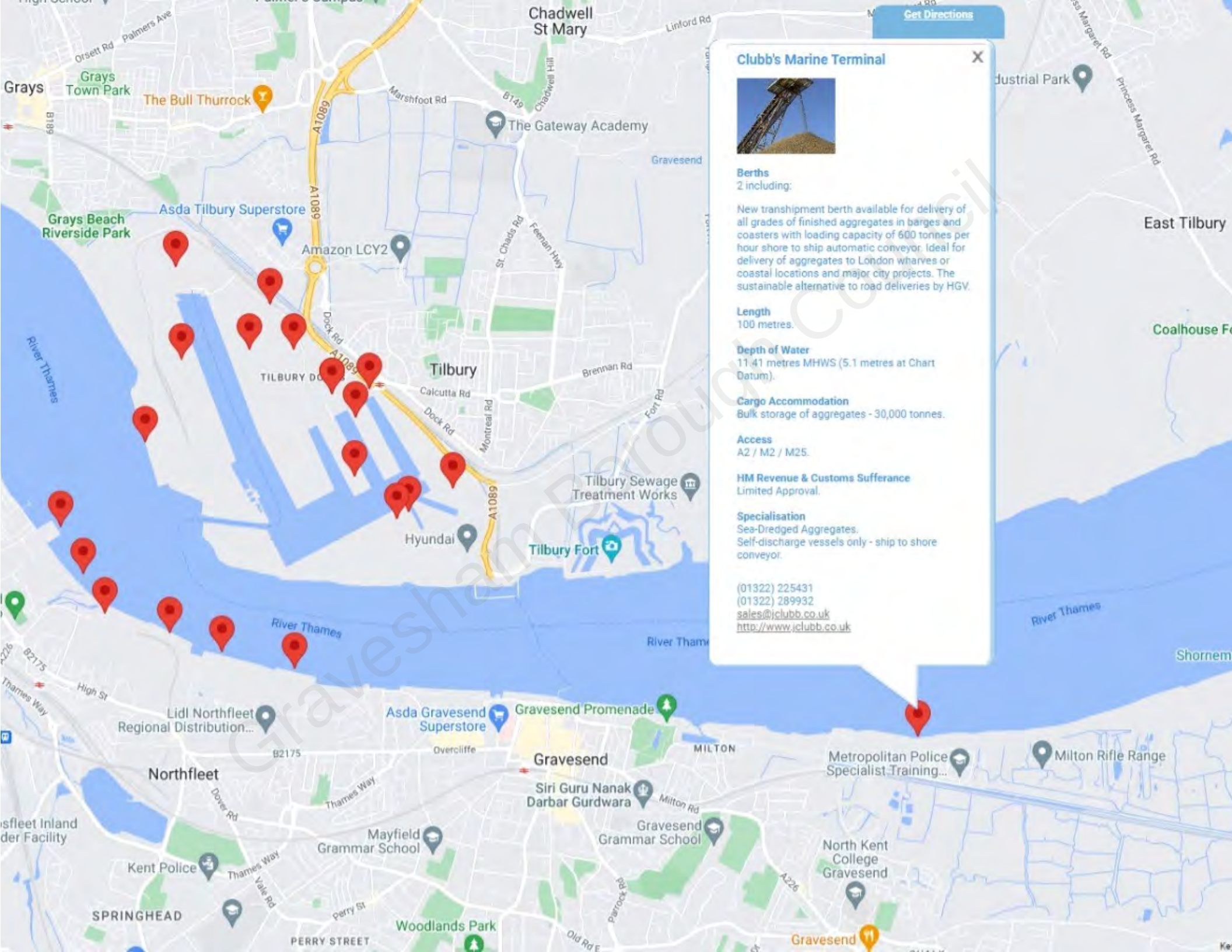
OFFICIAL PORT LISTING

Region	Landing Port (Standard Name)	Wharves / Alternative Names
North East	Blyth	Blyth
Humber	Immingham	Immingham
	Lincshore	Lincshore
	River Humber Wharves	Goole, Grimsby, Howden, Hull, Hull N&Y, Hull Northern Aggregates, Pyewipe, St Andrew's Quay, Stema Hull
	River Tees Wharves	Able Tees, Billingham, Middlesbrough, Tees, Tees Sand, Seaton, Middlesbrough Dawsons, TCP East Quay (Shire Aggregates)
	River Tyne Wharves	Gateshead, Jarrow, Tyne, Jarrow Wharf (Cemex)
East Coast	Sunderland	Hendon, Hendon Dock, Sunderland
	Bacton	Bacton
	Ipswich	Hanson/ARC Ipswich, Ipswich
Thames Estuary	Lowestoft	Lowestoft
	Barking	Barking, Docklands Wharf
	Cliffe	Alpha Wharf, Cliffe, North Sea Terminal
	Dagenham	Hanson/ARC Dagenham, Dagenham, Dagenham Deport (Cemex)
	Denton	Denton, Denton B.A.D, Denton Sand, J Clubbs
	Erith	Erith, Pioneer Wharf
	Felixstowe	Felixstowe
	Greenhithe	Greenhithe, Hanson Greenhithe
	Greenwich Wharves	Angerstein, Blackwall Wharf, Charlton, Delta Wharf, Greenwich, Murphy's Wharf, Phoenix Wharf, Victoria Deep Wharf
	London Docklands Wharves (mostly disused)	Canning Town, Cargo Fleet Wharf, Clarence Wharf, East India Dock, Heron Quay, Millwall, Orchard Wharf, Peruvian Wharf, Rotherhithe, Silvertown, Thames Wharf, Thamesmead, Union Wharf, Victoria Wharf
	Northfleet	Northfleet, Northfleet Brett, Robin's Wharf
	River Medway & Swale Wharves	Queenborough, Ridham, Rochester, Rochester Hanson, Sheerness
	Swale Wharves	Ridham, Queenborough
	Tilbury	Tilbury Stema
	Thurrock	Purfleet, Purfleet PAL, Thurrock, West Thurrock
East English Channel	Dover	Dover
	Hythe	Hythe
	Lydd	Lydd
	Newhaven	Newhaven, Cemex Newhaven
	Ramsgate	Ramsgate
	Rye	Rye
South Coast	Cowes	Cowes, East Cowes, IOWA/Isle of Wight Aggregates, Kingston Wharf, Medina Wharf, Cemex/SCS West Cowes, TMD/UMD West Cowes, West Cowes
	Eastbourne	Eastbourne Beach
	Elmer	Elmer Beach
	Langstone Harbour Wharves	Bedhampton, Havant, Kendall's Wharf, Langstone, TMD/UMD Bedhampton/ Portsmouth
	Littlehampton	Littlehampton, TMD/UMD Littlehampton
	Newport, Isle of Wight	Blackhouse Quay (disused), Newport IoW, Solent Services, West Medina Mills (disused)
	Pevensey	Pevensey Beach
	Plymouth	Millbay, Plymouth, Stonehouse
	Poole	Poole
	Portsmouth Harbour Wharves	Fareham, Gosport, LRA Tipner, LRA Upper Wharf, Portsmouth
	Shoreham Harbour Wharves	Hanson/ARC Shoreham, Hall's Wharf, Hiedelberg Portslade, Kendall's Wharf Shoreham, Portslade, Cemex/SCS Shoreham, Shoreham, Shoreham Ferry Wharf, TMD/UMD Shoreham
	Southampton Wharves	Burnley Wharf, Dibbles Wharf, Eling Wharf, JP Marks, JPM Super Wool, Leamouth, LRA Marchwood, Marchwood, Cemex/SCS Southampton, Southampton, Southampton (Fawley), Spitfire Wharf, Totton, TMD/UMD Burnley Wharf, Woolston
	Southsea	Southsea
Channel Islands	Guernsey	Guernsey, St Sampson

OFFICIAL PORT LISTING

Region	Landing Port (Standard Name)	Wharves / Alternative Names
South West	Appledore	Appledore, Appledore Evans, Bidna
	Avonmouth	Avonmouth, BCA Avonmouth, Cemex/BDL Avonmouth, Hanson Avonmouth, Remix Avonmouth, TMD/UMD Avonmouth
	Barnstaple	Barnstaple
	Barry	Barry
	Bridgwater	Bridgwater, Dunball Wharf
	Briton Ferry	Briton Ferry, Cemex Briton Ferry, Giant's Wharf, Hanson Briton Ferry, Ironworks, Riverside Wharf, Tarmac Briton Ferry
	Burry Port	Burry Port
	Cardiff	Cardiff, TMD Cardiff, Cemex Cardiff, Hanson Cardiff, Empire Wharf, Roath Dock
	Hinkley	Hinkley Jetty
	Newport, Wales	Alexandra Dock, Hanson/ARC Newport, East Bank/Ferry Terminal, Eastern Wharf, Newport, Newport (Wales), Newport 2
	Pembroke	Pembroke
	Port Talbot	Port Talbot
	Swansea	Prince of Wales Dock, Cemex/BDL Swansea, Swansea
	Yelland	Yelland
North West	Barrow	Barrow
	Eastham	Eastham
	Glasson	Glasson
	Heysham	Heysham
	Liverpool Wharves	Albert Dock, Birkenhead, Bramley Moore Dock, Garston, Liverpool, Mersey Wharf, Mostyn
	Penrhyn	Penrhyn
Northern Ireland	Belfast	Belfast
Continental Europe	Amsterdam	Amsterdam, Amsterdam AGM, Amsterdam PAES, Hanson/CM/Hiedelberg Amsterdam, Steen Korrel
	Antwerp	Antwerp, Hanson/CM Antwerp, Kallo, Antwerp Sands
	Breskens	Breskens
	Boulogne	Boulogne, Boulogne-sur-mer
	Bruges	Alzagri, Bruges, Brugge, Hanson/CM Brugge
	Caen	Caen
	Calais	Calais
	Dieppe	Dieppe
	Dunkirk	Hanson/CM Dunkirk Sand, Dunkerque, Dunkirk, Dunkirk Gravel, Dunkirk Sand, Mardyck
	Fecamp	Fecamp, Fecamp Mercier
	Flushing	Flushing, Vlissingen
	Gent	Gent, Kluizendok
	Harlingen	Harlingen
	Honfleur	Honfleur
	Ijmuiden	Ijmuiden
	Le Havre	Le Havre, Treguier
	Le Treport	Le Treport
	Moerdijk	Moerdijk
	Nieupoort	Nieupoort
	Ostend	Ostend, Ostend ISG
	River Seine Wharves	Lillebonne, Rouen, St Wandrille, Vatteville, Vattewille-la-Rue
	River Somme Wharves	Vattier
	Roscoff	Roscoff
	Rotterdam	De Hoop Rotterdam, Europoort, Rotterdam, Schiemond
	Sluiskil	NL Sluiskil, Sluiskil
	Terneuzen	Terneuzen
	Thyboron	Thyboron
	Zeebrugge	Zeebrugge, Zeebrugge DVSII, Zeebrugge Hanson

Appendix 5: Port of London Authority Maps



Clubb's Marine Terminal



Berths

2 including:

New transhipment berth available for delivery of all grades of finished aggregates in barges and coasters with loading capacity of 600 tonnes per hour shore to ship automatic conveyor. Ideal for delivery of aggregates to London wharves or coastal locations and major city projects. The sustainable alternative to road deliveries by HGV.

Length

100 metres.

Depth of Water

11.41 metres MHWS (5.1 metres at Chart Datum).

Cargo Accommodation

Bulk storage of aggregates - 30,000 tonnes.

Access

A2 / M2 / M25.

HM Revenue & Customs Suffrance

Limited Approval.

Specialisation

Sea-Dredged Aggregates.
Self-discharge vessels only - ship to shore conveyor.

(01322) 225431

(01322) 289932

sales@clubb.co.uk

<http://www.jclubb.co.uk>

Johnson's Wharf



Berths - 2 Dolphins

1 - Dedicated to own dredgers.

Depth of Water

11.16 metres MHWS (4.6 metres at Chart Datum).

Cargo Accommodation

Marine Aggregates only.

Access

Connection to national road system A2 / M2 / M25.

HM Revenue & Customs Sufferance

Limited Approval.

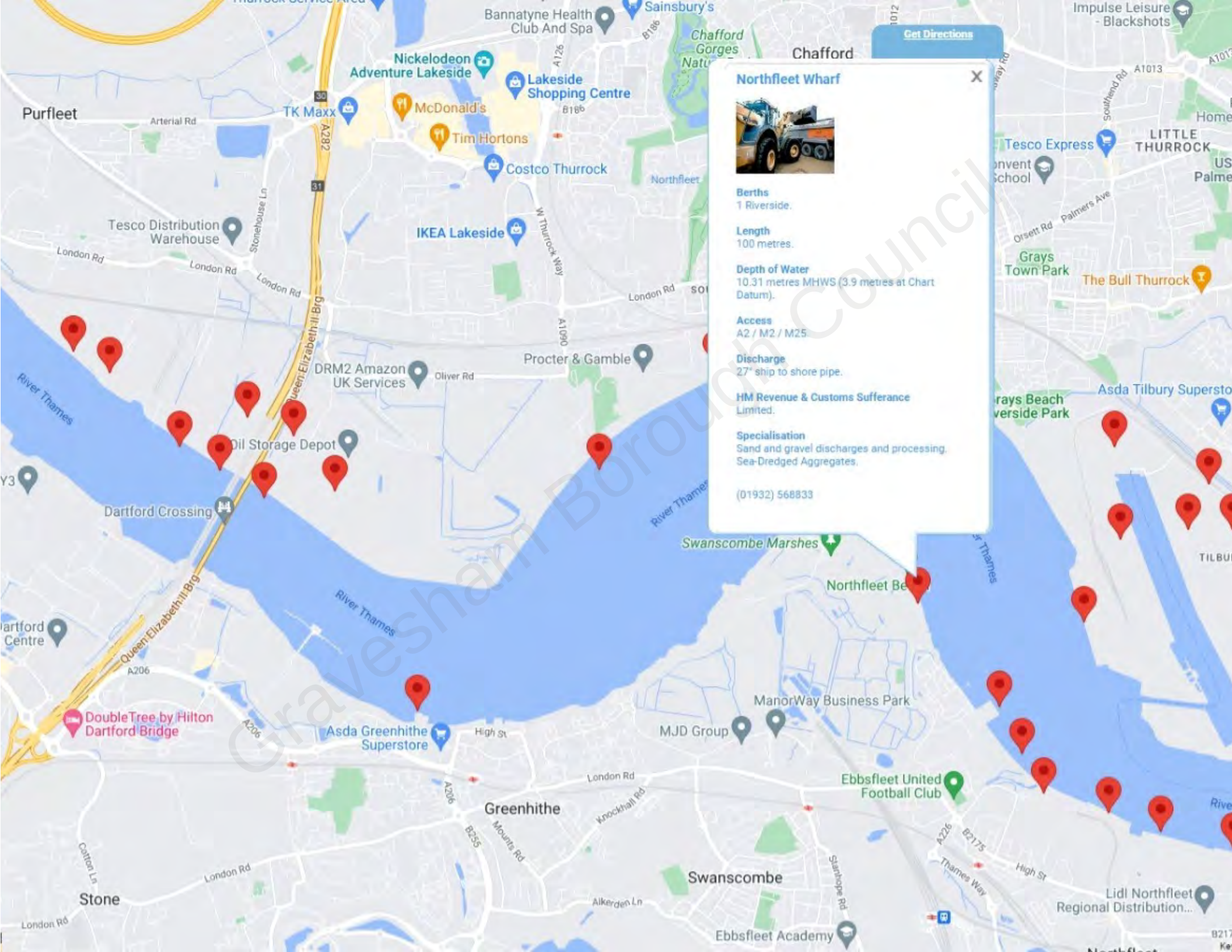
Specialisation

Marine Aggregates dredging and processing.
2 Receiving hoppers and 2,000 t.p.h. discharge conveyors for self-discharging vessels.

(01322) 386561

(01322) 381189

<http://www.hanson.co.uk>



Northfleet Wharf



Berths

1 Riverside.

Length

100 metres.

Depth of Water

10.31 metres MHWS (3.9 metres at Chart Datum).

Access

A2 / M2 / M25.

Discharge

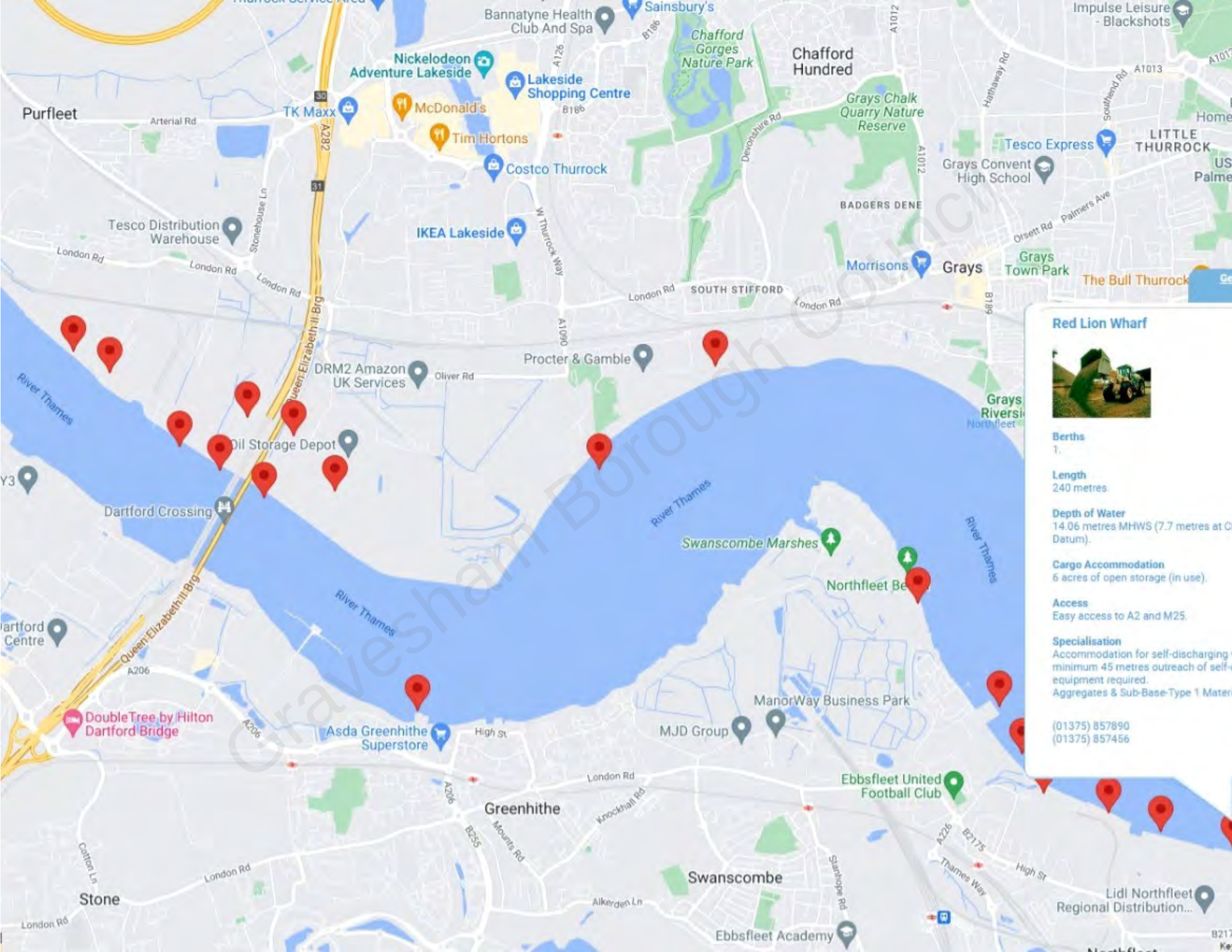
27" ship to shore pipe.

HM Revenue & Customs Sufferance Limited.

Specialisation

Sand and gravel discharges and processing.
Sea-Dredged Aggregates.

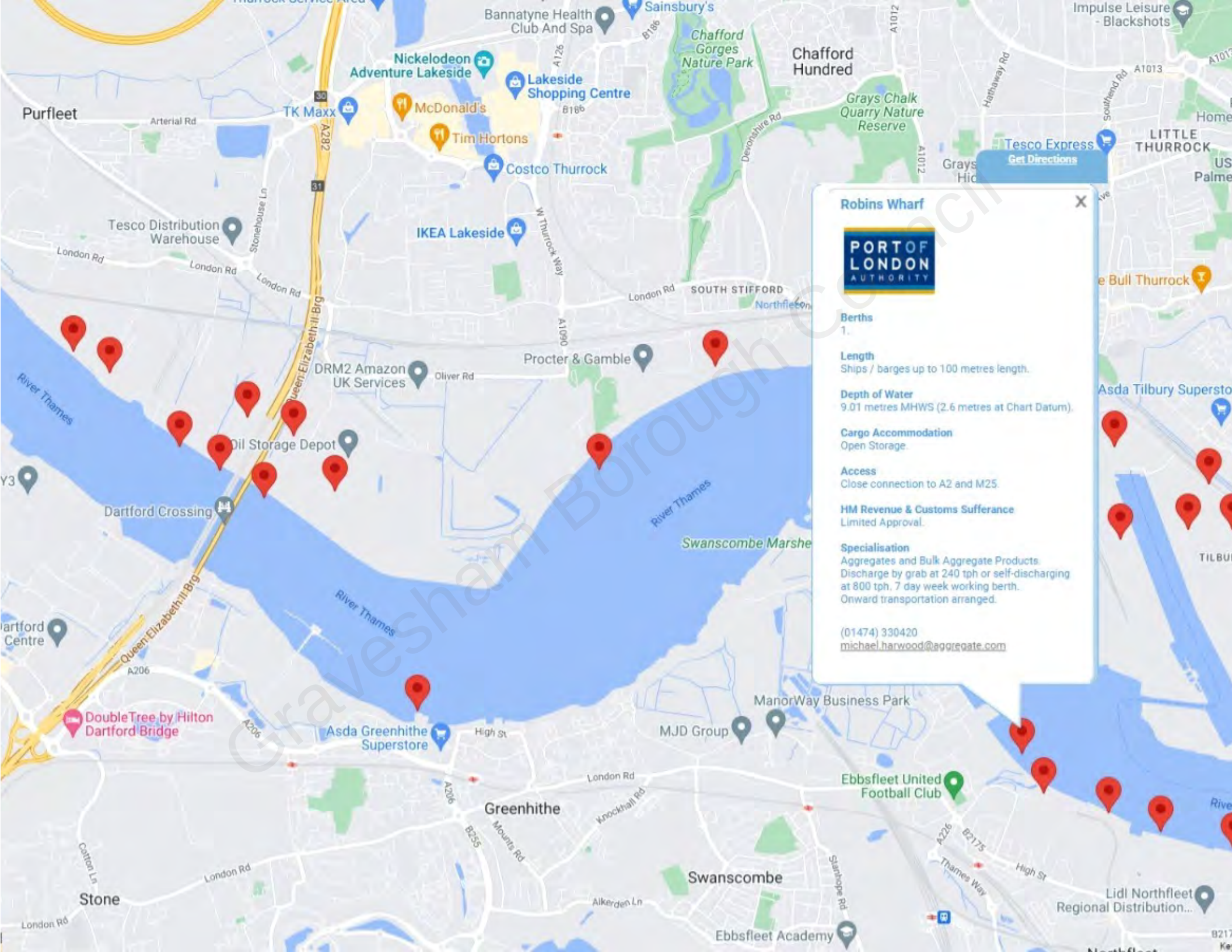
(01932) 568833



Red Lion Wharf



- Berths**
1.
- Length**
240 metres.
- Depth of Water**
14.06 metres MHWS (7.7 metres at C Datum).
- Cargo Accommodation**
6 acres of open storage (in use).
- Access**
Easy access to A2 and M25.
- Specialisation**
Accommodation for self-discharging minimum 45 metres outreach of self-equipment required.
Aggregates & Sub-Base-Type 1 Material
- (01375) 857890
(01375) 857456



Robins Wharf



Berths

1.

Length

Ships / barges up to 100 metres length.

Depth of Water

9.01 metres MHWS (2.6 metres at Chart Datum).

Cargo Accommodation

Open Storage.

Access

Close connection to A2 and M25.

HM Revenue & Customs Sufferance

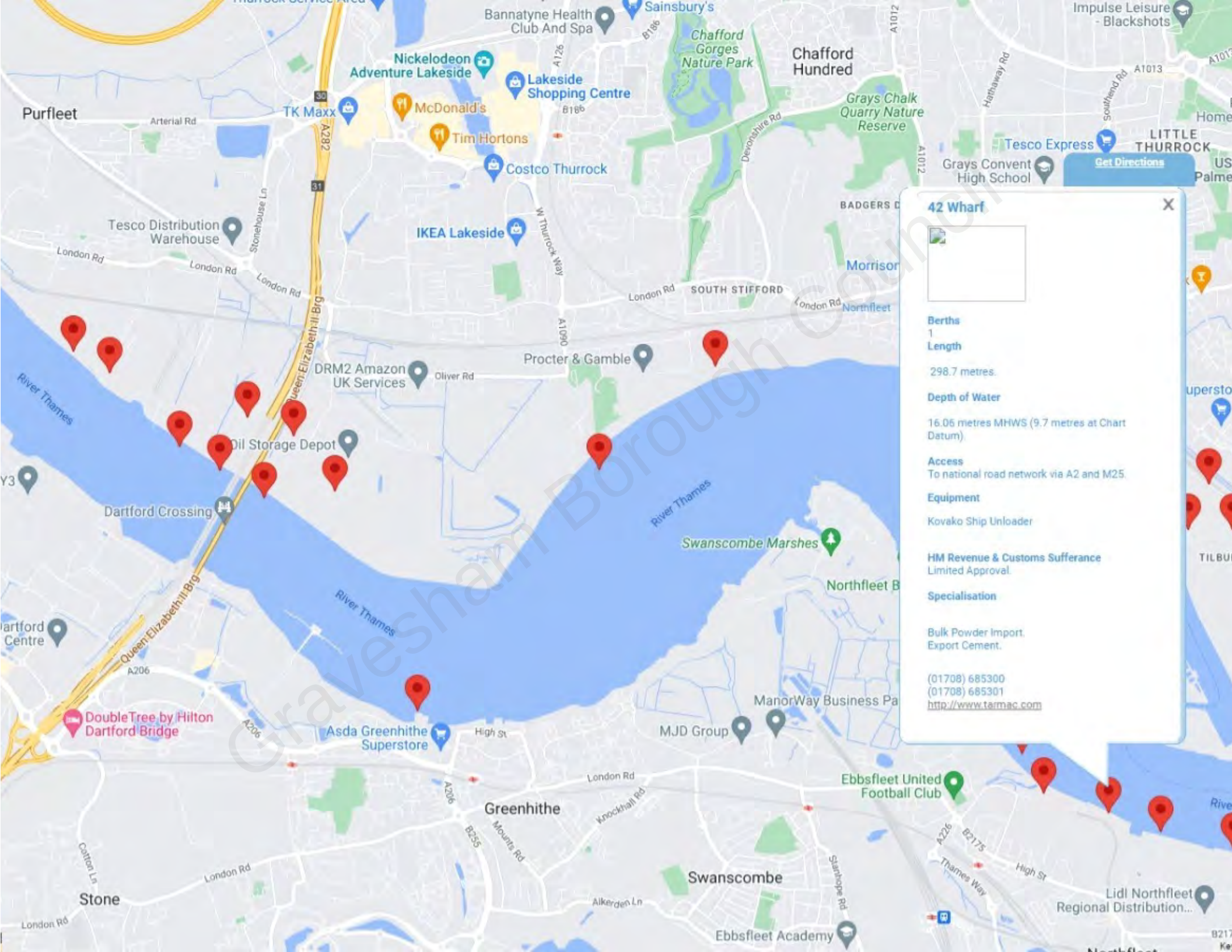
Limited Approval.

Specialisation

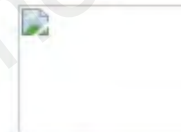
Aggregates and Bulk Aggregate Products.
Discharge by grab at 240 tph or self-discharging
at 800 tph, 7 day week working berth.
Onward transportation arranged.

(01474) 330420

michael.harwood@aggregate.com



42 Wharf



Berths

1

Length

298.7 metres.

Depth of Water

16.06 metres MHWS (9.7 metres at Chart Datum).

Access

To national road network via A2 and M25.

Equipment

Kovako Ship Unloader

HM Revenue & Customs Sufferance

Limited Approval.

Specialisation

Bulk Powder Import.
Export Cement.

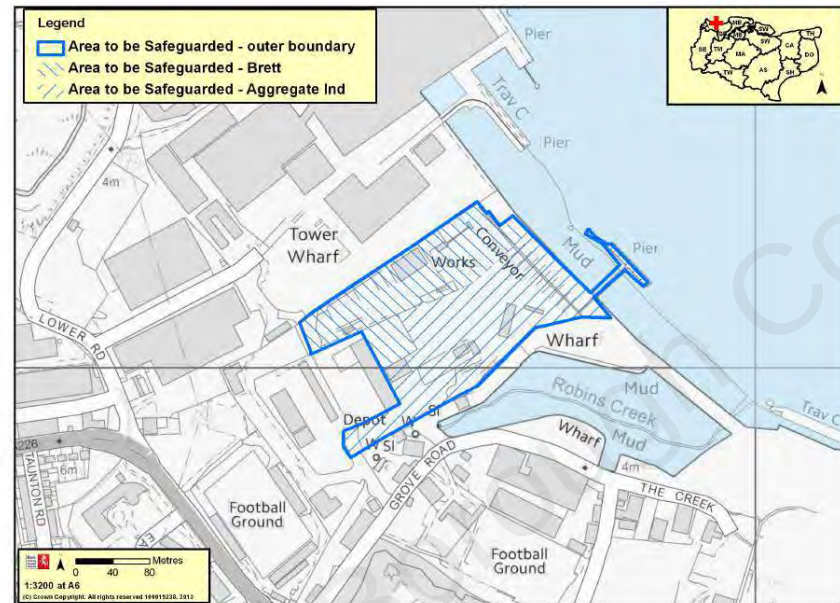
(01708) 685300

(01708) 685301

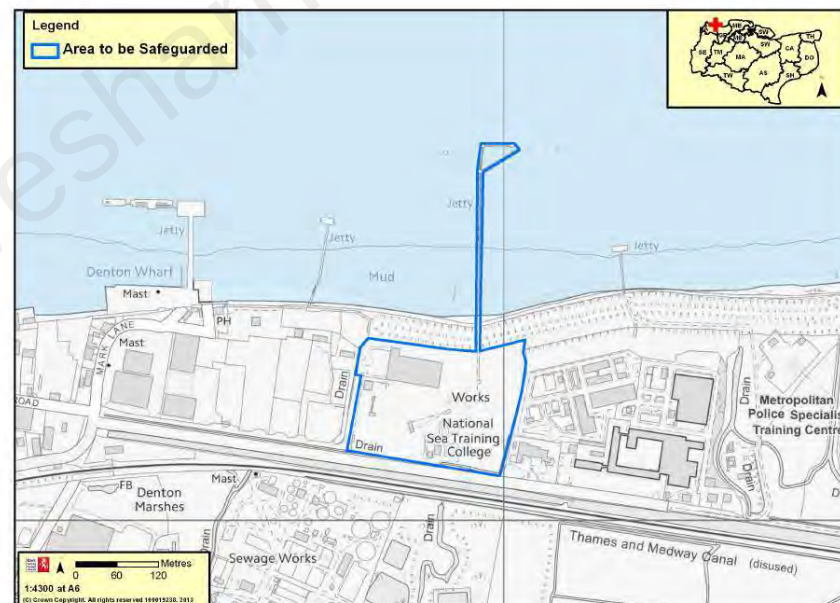
<http://www.tarmac.com>

DRAWINGS

Site G: Robins Wharf, Northfleet



Site H: Clubbs Marine Terminal



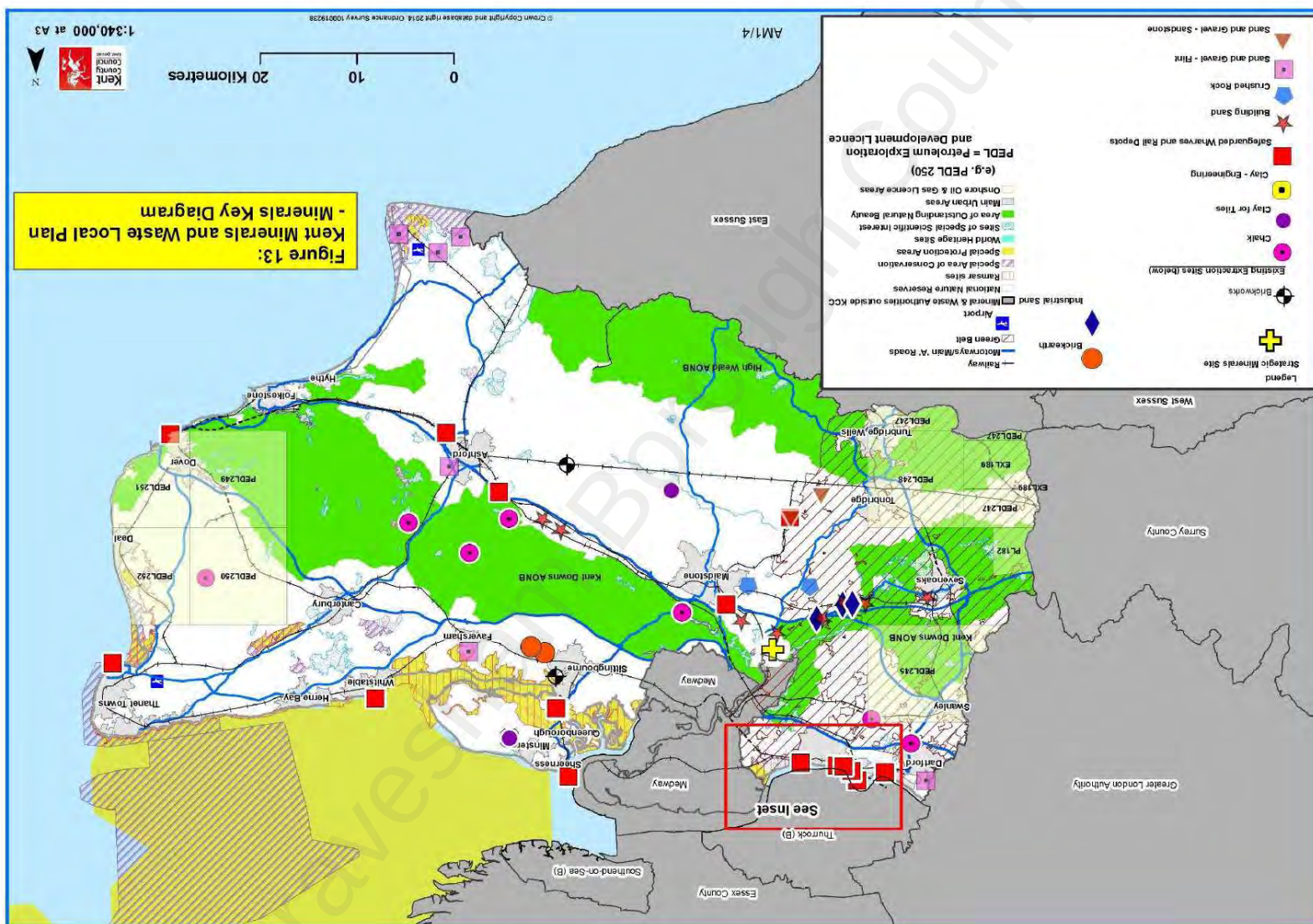


DO NOT SCALE FROM THIS DRAWING

- Site boundary
(19.0 Ha)
- Structures to be demolished
(4.02 Ha)
- Robins Wharf and Associated Mineral Infrastructure -
Approximate Area

REVISION	DETAILS	DATE	ISSUED	CHG	APP
CLIENT	FOMTERV				
PROJECT	NORTHFLEET PARAMETER PLAN NORTHFLEET, LONDON				
DRAWING TITLE	DEMOLITION PLAN				
DRG No.	ST19719-001	REV	SUT. CODE		
DRG SIZE	A1	SCALE	1:1500	DATE	28/09/2022
DRAWN BY	GP	CHECKED BY	SW	APPROVED BY	SW





STOKE-ON-TRENT

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Etruria
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Tel: +44 (0)1782 276 700

BIRMINGHAM

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Longbridge Technology Park
Longbridge
Birmingham
B31 2TS
Tel: +44 (0)121 580 0909

BOLTON

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Aspinall Way
Middlebrook
Bolton
BL6 6SU
Tel: +44 (0)1204 227 227

BRISTOL

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