

Industrial Sands Working Group

Agreed Minutes

Title of meeting:	Industrial Sands Working Group
Date:	12 th September 2017
Attendees:	Melissa Spriggs (Hampshire CC); Richard Drake (Norfolk CC); David Maxwell (Surrey CC); Lauren Darby (British Ceramics Federation); Rob Thain (South Downs National Park); Rachel Pillar (North Yorks CC); Richard Page (Silica and Moulding Sands Association/Mineral Products Association); Nick Horsley (Minerals Product Association/SAMSA); Tom Bide (BGS); Roy Romans (Central Bedfordshire Council); Susan Marsh (Central Bedfordshire Council)
Apologies	Trevor Badley (Dorset CC); Emma Williams (Cheshire East); Ian Blake (BPP Consulting); Bryan Geake (Kent CC); Marianne Joynes (Worcestershire CC); Steven Osborne-James (Nottinghamshire CC); Matt Griffin (Staffordshire CC); Mike Hurley (Sibelco); Catherine Morgetroyd (Cheshire West & Chester)
Venue:	Community Voluntary Services offices, Bedford.
Contact:	Roy Romans

Item	Actioned by
<p>3. Election of Chair for the meeting.</p> <p>Roy Romans was elected</p>	
<p>4. Approval of minutes from last meeting and matters arising</p> <p>The minutes were agreed. PNH although not present at the previous meeting, highlighted some points on the minutes for clarification relating to previous working groups and Government/Industry for a which had been involved in the production of the former silica sand circular 24/85 and also Minerals Planning Guidance Note 15: Provision of Silica Sand in England. It was also pointed out that cross boundary movement of silica sand were not limited to Scottish imports in to England. There are movement from England in to Scotland. It was also pointed out that sands used in the conventional oil and gas sector were not a new concept.</p>	

<p>Matters arising: Members of the industrial sand industry and BGS had been invited and attended the meeting. Rob Thain had circulated amended Statement of Common Ground.</p>	
<p>5. Scope of Working Group</p> <p>Roy Romans gave a summary of the scope of the Working Group discussed at the previous meeting which was to help plan for future supply of silica sand and assist in the requirement of the LPAs duty to cooperate. It was hoped that the forum would provide a better level of intelligence to inform the decision-making process.</p> <p>Nick Horsley set out the historical guidance and information concerning industrial sands and highlighted the fact that sales had remained fairly constant at around 4 Mtpa, post MPG15, up to 2014. Hence, it was considered that the Government sponsored BGS factsheet on silica sand production remained relevant.</p> <p>Roy Romans recognised what information did exist but was concerned that the total sales figures consisted of very different markets which were supplied by specific extraction sites and one of the main aims of the Working group was to provide more detailed data on supply and demand in order to allow the industry and mineral planning authorities to make more informed decisions about future supply options.</p> <p>Richard Page made the point that as industrial sands were of relatively high value due to the critical nature of their physical and chemical properties, they were less affected by haulage costs and therefore the market areas for most technical grades of silica sand were national and cross boundary.</p> <p>The attributes of the sands determine the market and supply patterns. Consistency of material was also considered critical, a point emphasised for the sector by Lauren Darby. Concern was expressed by both the LPA and Industry representatives at the lack of central government engagement in the mineral planning process and the lack of commitment to ensure data is collated by Central Government.</p> <p>Tom Bide referred to previous work carried by BGS on industrial sands (County Reports) and highlighted the general inconsistency of the geological deposits with some extraction sites supplying a range of markets, sometimes including building sands for the aggregate market.</p> <p>There was a general discussion about the various end uses for industrial sands, how this had changed in the past, what the current markets were doing and how these might evolve in the future. This included what demand there might from the fracking industry and the difficulty in identifying markets where sand was sold to merchant</p>	

<p>companies. The discussion also included what information the industry would be prepared to make available to inform discussions on future supply pressures and the need for an independent overview.</p> <p>Roy Romans informed the group of a current silica sand study being undertaken by Alan Thompson. It was noted that the industry representatives were not aware of this study although industrial sand operators in Bedfordshire were involved in the study. Roy Romans indicated that a link to the finalised study would be circulated. Significant debate took place over the variable nature of the deposits both geologically and geographically.</p> <p>It was agreed that there would be significant challenges to producing a detailed market study on an end-use by end-use basis. There are a number of unknowns which would complicate the matter and one also has to consider the grades available at any one time within a quarry. It was also noted that the scope for major importation and export of Silica (Industrial) Sands were limited although it was recognised that small scale imports and exports did occur.</p> <p>Tom Bide agreed to look at what the approximate cost would be of a review of the BGS Silica Sand Fact Sheet.</p> <p>It was also agreed that Roy Romans would write an article for the technical press to promote awareness of the work of the group.</p>	<p>Tom Bide</p> <p>Roy Romans</p>
<p>6. Progress on Data Collection</p> <p>Rob Thain clarified that the sales and reserves figures included in Table A were provide by mineral planning authorities from published public sources. Some discussion was had on how to keep this updated. It was agreed that it would be useful to try for a yearly update based as at the end of the calendar year. It was also agreed that a yearly meeting should be set to allow time for any data to be collected and collated beforehand.</p> <p>There were questions raised over the accuracy of the some of the production and reserve tonnages quoted. The drawbacks of using total tonnages was also recognised due to many of the points raised under 5. above. Richard Page also highlighted the complexities of processing and classifying the materials which cannot be underestimated. Nick Horsley suggested that the table needed to highlight constraints and other parameters that limited the supply chains to the wider silica sand markets. It was also felt that the table needed to ensure that the terms reserves and resources were those recognised in land use planning and not under PERC. Tom Bide confirmed that reserves need to be consented. Rob Thain advised that the table would be sense checked before being circulated to industry.</p>	
<p>7. Any Other Business.</p> <p>None.</p>	

8. Arrangements for Next Meeting

Nick Horsley offered to host a meeting at the MPA's offices in London in May/June 2018. Precise date to be confirmed.

Nick Horsley