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Aggregate Round Table

Towards a Long-Term Aggregate Strategy for Ontario

**Black Creek Pioneer Village, Toronto, Ontario
January 26th, 2006**

Summary Report

This Summary Report was prepared by Lura Consulting, third-party facilitators for the Aggregate Round Table. The report captures the key outcomes and discussion highlights from the meeting. It is not intended as a verbatim transcript. If you have any questions or comments regarding the summary, please contact either:

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1.0 INTRODUCTION

The Environmental Commissioner of Ontario hosted a one-day meeting – *Aggregate Round Table: Towards a Long-Term Aggregate Strategy for Ontario* – in Toronto, Ontario on January 26th, 2006.

The purpose of the Aggregate Round Table was:

- To enable a dialogue among key stakeholders about the need for – and possible components of – a long-term aggregate strategy for Ontario.

The Round Table brought together over thirty stakeholders representing a broad range of organizations involved in the aggregate sector, including representatives from industry, provincial and municipal government, and non-government organizations. The Round Table agenda is attached as Appendix A and the list of participants at the meeting is included in Appendix B.

Key materials provided to participants for the Round Table included a “Consolidated Statement of Facts” which was circulated to those who registered prior to the meeting, and a “Participant Workbook”, containing the Round Table agenda and discussion questions.

This Summary Report was prepared by Lura Consulting, third-party facilitators for the Aggregate Round Table. The report captures the key outcomes and discussion highlights from the meeting. Sections 2 – 4 of the report provide an overview of the context, format and key inputs for the Round Table. Section 5 presents a summary of the discussion on twelve discussion statements that provided the focus for dialogue at the meeting. Finally, Appendix C contains detailed participant feedback on the twelve discussion statements.

2.0 WELCOME AND OPENING REMARKS

Mr. Gord Miller, Environmental Commissioner of Ontario welcomed and thanked participants for attending the meeting. Mr. Miller noted that the overall purpose of the Round Table was to focus on the need for and potential components of a long-term strategy for aggregates in Ontario – to the year 2020 – while avoiding debate about day-to-day issues of compliance and operations. He noted that he had organized the meeting because he sensed the need for more communication among stakeholders about long-term aggregate policy, and that feedback from pre-Round Table discussions had confirmed that such a dialogue would be valuable. He acknowledged that the meeting was not intended to resolve long-standing issues, but rather to identify areas of common ground, as well as those that require further discussion.

There is no hidden agenda here. There will be no special report to the Legislature by the ECO on aggregate policy. We hope that we can have a stimulating discussion that identifies areas of broad agreement and perhaps clarifies some misunderstandings. We hope that you will get a lot out of it and the discussion today will allow you, the policy community, to move forward.

Gord Miller, Environmental Commissioner of Ontario

From the ECO's perspective, Mr. Miller indicated that the Round Table results would also inform the Commissioner's policy analysis on aggregates and contribute to the annual reporting process to the Legislature.

The Commissioner added that Lura Consulting would prepare a "third-party" report on the Round Table proceedings. He concluded by expressing optimism that the meeting would "spark some future policy initiatives that would be beneficial to the environment of Ontario."

3.0 AGENDA REVIEW AND INTRODUCTIONS

Round Table Facilitator David Dilks reviewed the proposed format of the session and Lura's role to provide neutral facilitation and reporting. He noted that the agenda had been developed based on pre-consultation with representatives from industry, government and non-government organizations, and that there was strong support for a dialogue focused on a long-term aggregate strategy. Mr. Dilks reviewed the twelve discussion statements that were intended to help focus participants on topics of common interest. He added that the Round Table report would summarize participant perspectives on these discussion statements, attributing feedback to the following "sectors":

- Industry
- Provincial Government
 - Regulator
 - Other Agencies
- Municipalities
 - Aggregate Users
 - Site Hosts
- NGOs

Following the agenda review, David facilitated a round of introductions.

4.0 CONSOLIDATED STATEMENT OF FACTS

Ellen Schwartzel of the ECO provided an overview of the Consolidated Statement of Facts (CSOF), noting that its purpose was twofold: to help identify key themes and discussion points for the Round Table; and to provide a preliminary indication of areas of agreement and disagreement between a sub-set of stakeholders. She indicated that the document had been developed with input from five groups, representing industry, government and non-government contributors. She stressed that the resulting product is by no means comprehensive, nor does it reflect the views of all stakeholders.

Ms. Schwartzel then provided her observations on the areas of broad agreement and disagreement emerging from the exercise.

Areas of Broad Agreement	Areas of Disagreement
<ul style="list-style-type: none"> • Common understanding of what the existing regulations require • Scale of current overall production rates • Significant aggregate needs for Greater Toronto Area (GTA) • We don't know enough about recycling rates, recycling potential • Existing royalty regime is old • Existing royalty and licence fees don't encourage resource conservation • Aggregate extraction in Southern Ontario is an increasing source of conflict • In the long run, sources close to demand areas will be depleted 	<ul style="list-style-type: none"> • Adequacy of publicly available data on production, demand, consumption • Growth projections • Environmental impacts of aggregate extraction (water impacts, rehabilitation) • Capacity of Ministry of Natural Resources to regulate the resource • Advantages of close-to-market sources • Potential for northern Ontario sources

She concluded by noting that the effort to develop the CSOF had been very useful in developing the Round Table discussion statements, and that she looked forward to broader feedback on the current version of the CSOF.

Feedback on the Consolidated Statement of Facts

Participants provided the following comments on the CSOF:

- Some of the facts are similar (e.g., #44 and #51 are almost the same, and should be treated similarly in the document).
- Currently, there is no central suppository for all of the “facts” relating to aggregates; a document like the CSOF could contribute to filling this gap.
- The document is challenging to read – some things were crossed out that still remain valid (e.g. lack of publicly available information).
- Concern that the CSOF is not complete (e.g., there are no points about the impacts of truck traffic).
- The document confirms the need to update aggregate policy and legislation to better deal with new land use policies and realities in Ontario.
- The CSOF represents a solid first iteration.

Participants generally agreed that the exercise to develop the document was valuable, and that there is merit in further work to refine and enhance the CSOF contents.

5.0 DISCUSSION OF KEY THEMES

This section provides a summary of the feedback received from participants on each of the twelve discussion statements discussed at the meeting. For each statement, the level of agreement among participants is noted, along with major caveats or comments raised. For a complete compilation of all comments received (including individual workbooks) by participant “sector”, please see Appendix C.

A. The Need for Aggregate

1. Consumption figures for the last decade indicate that overall aggregate consumption has been increasing by 2 – 4 % per year in Ontario; under a business-as-usual scenario, this trend is likely to continue.

Agreement not found: Participants generally agreed with the need for a standardized, consistent approach for characterizing consumption as a basis for future plans/policy, but not necessarily that a business-as-usual scenario or a 2-4% rate of increase per year is appropriate.

Comments:

- Those who agreed with the annual 2-4% increase in consumption as a basis for planning stated that this is based on commonly applied practices for characterizing consumption.
- Others agreed with the need for a standard approach for characterizing consumption, but questioned the 2-4% rate due to:
 1. Unreliability of growth estimates;
 2. Recycling potential had not been factored in and could reduce demand;
 3. Potential changes in technology and mining methods (e.g., underground) were not considered;
 4. Confounding factors such as climate change, surges or drops in production, changes in urban form; the uncertain influence of government policy on demand/consumption; and the lack of predictability due to shortage of publicly available data;
 5. The need to factor in Ontario’s current infrastructure deficit, and the reality that a period of “catch up” is needed.
- It was suggested that it is important to consider whether a business-as-usual scenario is either desirable or sustainable.

B. Challenges for Close-To-Market Aggregate Sources

2. Under projected population growth plans, and if per capita aggregate consumption rates are maintained, it will become impossible by 2020 to satisfy the aggregate needs of the Golden Horseshoe area from local sources.

Agreement not found: There are a number of inherent uncertainties surrounding this statement that prevented concurrence.

Comments:

- Type and quality of aggregate materials vary – there may be an abundance of some aggregates, and shortage of others available within the Golden Horseshoe

area. New government standards may require specific materials that may or may not be available locally.

- Access to local Golden Horseshoe sources – which may be plentiful – is difficult due to lengthy licensing approvals, as well as social and environmental protection considerations.
- Some municipalities (e.g., Caledon) have adequate supply beyond 20+ years to provide their share, but not enough to support the entire Golden Horseshoe area demand.
- Shortage of publicly available data precludes a complete understanding of resource availability.
- Access to supply is not restricted in the new Greenbelt, but opposition may preclude licensing in this area.
- New mining methods such as underground techniques may enable additional local production.

3. The siting of new aggregate extraction operations will become increasingly difficult and contentious in the Golden Horseshoe area.

Agree: There was general agreement with this statement, as public awareness of aggregate issues is rising, and the potential social and environmental impacts of new aggregate operations are of concern to residents both in the Golden Horseshoe and elsewhere.

Caveats:

- The industry has made strides to improve relations with neighbouring communities. Siting of new aggregate operations can become less contentious if:
 - Communities have experience with “good operators”.
 - Increased efforts to reduce environmental and social impacts can help to mitigate community concerns.
 - There is increased community participation in decision-making.
 - Land use conflicts are minimized, and ecological and social priorities are protected.
 - The issue of trust is addressed – there is scepticism about the apparent lack of independence between provincial agencies, municipalities, and producers and this has led to a lack of public trust.
- There is a need for more holistic, landscape level planning, rather than site-by-site approvals. A common framework or guide for planning and siting new operations could help in addressing cumulative impacts and mitigate against inconsistencies and concentration of sites.
- More local control over planning and siting operations could aid the approval process.
- Changes in legislation – particularly in the areas of community engagement procedures and the site plan amendment process – are needed.

C. The Need for an Accurate, Current Inventory of Reserves, Consumption Trends

- 4. There is a need to update the 1992 State Of The Resource report, and to provide up-to-date information on aggregate reserves, aggregate consumption patterns and trends, including conservation and recycling trends.**

Agree: There was general agreement around the need for better up-to-date information for agencies and the public.

Caveats:

- Aggregate reserve data is confidential and not in the public realm. There needs to be a mechanism for protecting proprietary information while ensuring adequate data availability.
- Society expects greater transparency regarding a public resource.
- Updating the 1992 SOR report is one opportunity, but not the only mechanism. There is no need to repeat the land use planning and history components of 1992 SOR. Information/data that is relevant for future plans/policy should be updated in a transparent, credible process with public consultation. The information needs to be current in order for it to be used as the basis for public policy decisions and legislative change.
- APAO and TOARC would be willing to share some information, but there is a need to define what information is proprietary, and respect that information that affects competitiveness needs to remain private.
- A government agency should be the repository for the updated information, but would need to have the proper resources to undertake this work.
- Collection of up-to-date information is important but needs to be connected to overall policy and legislative change.

D. The Potential for Aggregate Conservation

- 5. There would be merit in examining existing design standards for roads, highways and other infrastructure (in relation to both the quantity and types of aggregate specified) to identify options to conserve aggregate.**

Agree: Participants generally agreed with this statement. There is merit in exploring better use of substitute/recycled materials, but it will be important to ensure that roads will last in the long-term if new standards or materials are introduced. A data collection system should be established for quarries/pits. A cost-benefit analysis should be conducted on existing design standards for roads/highways.

Caveats:

- Design standards will increase with warranties for pavements expected to lengthen to 15-20 years in future – it can be expected that more aggregate will be used in the future.
- There is a need to look at the effect recycling has on predicted consumption rates.
- When recycling facilities are located within pits, they are perceived as “permanent” facilities, and therefore of concern to local residents.

- The issue of integrity of materials could arise, and there is the real potential that recycled material may not meet warranty standards.
- There is a need to consider environmental benefits and impacts of using alternative materials.
- Currently there are no incentives for municipalities or operators to use recycled materials. Incentives will be needed. Cost may be an issue for some municipalities.
- Compact urban form could play a role in conservation.

6. More effective use of existing licensed aggregate sites is feasible, and would reduce the pressure for greenfield sites and expansions.

Agree: Participants generally agreed with this statement. Producers have made progress to make better use of site footprints and residual materials. There is an ongoing need to ensure conformity with license conditions, and for a stronger policy framework.

Caveats:

- Producers would like the ability to do more on-site recycling.
- Concern if “more effective use” is interpreted to mean reduced set-backs or deeper pits.
- This statement may not apply much for existing rock quarries, as opportunities are limited for expanded site use.
- Existing licence provisions need to be adhered to and enforced.
- Municipalities need better control over operations after approvals have been given; monitoring and enforcement is a problem.
- More effective use of existing sites needs to be looked at in the context of a reworked policy and legislative framework, and enabled by this.

7. Annual licence fees and royalties should reflect the full societal and environmental costs of aggregate extraction.

Agree: There was general agreement around the need to increase licence fees and royalty amounts to encourage conservation, provide additional resources for government oversight, and address the inequity in costs and benefits between host and user municipalities.

Caveats:

- There is an imbalance between the hosts and users of aggregates – host municipalities currently absorb the true cost for aggregate extraction, while users benefit from relatively inexpensive supplies. This inequity needs to be addressed. It is acknowledged that costs will rise for users.
- Public sector purchasers of aggregate (municipalities) will be impacted by higher costs.
- This approach could encourage more use of wayside pits. These have less stringent rules, but potentially equivalent environmental impacts. This should be avoided in a new financial regime.
- This is one mechanism to achieve conservation. Higher costs could reduce demand.

- Fees should be dedicated to the aggregate program, not to the province's general revenue streams.
- If the financial regime is to be changed unilaterally in Ontario, the issue of competitiveness needs to be addressed, both inter-provincially and internationally.

E. Opportunities for Alternate Sources

8. There are additional opportunities to extract and ship aggregate from northern Ontario.

Agree: Participants agreed that there are additional opportunities regarding northern extraction/shipping, but indicated that it might not be economically feasible in the near term. If aggregate is shipped from northern Ontario, the environmental and social impacts should be mitigated and extraction must be regulated. This should be viewed as a long-term solution only.

Caveats:

- Existing transportation infrastructure (rail, docks) may not support this option. Plans need to be made now to protect existing infrastructure as well as for new corridors/dock sites for future infrastructure.
- The environmental, social and community impacts of northern extraction need to be considered.
- Supply exists now locally; long-haul is a solution for the long-term.
- The demand for aggregate should be decreased before extraction is encouraged in northern Ontario.
- Aggregate Resources Act should apply to northern extraction. Northern Ontario should be designated under the Aggregate Resources Act.

9. It would be worthwhile to investigate the potential for underground mining of aggregate, as well as underwater dredging of aggregate.

Agree: There was general agreement with this statement, but participants raised questions about technical and economic feasibility, health and safety, and government support.

Caveats:

- Lafarge has experience with underground mining but not in Ontario, and in areas with different geologic conditions than Ontario. There are questions about whether this is technically or financially feasible here.
- Social (health and safety), environmental, source water and fisheries impacts need to be considered.
- Could be a long-term option if existing supply is depleted.
- Government interest/support would be required in order to pursue this option further.

F. Options for Transportation of Aggregates

10. The feasibility of transporting aggregate in less energy intensive ways (including water and rail) deserves to be examined.

Agree: There was general agreement with this statement. Existing dock and rail facilities need to be protected to ensure that future transportation options are available, and new rail corridors and docking areas need to be identified as well. This should be viewed as a longer-term option.

Caveats:

- Much rail infrastructure has been lost, and there are questions as to whether it is economically feasible to use this mode.
- Would need really big volumes to get interest of railroads.
- Water transportation can be expensive in some cases and is dependent on dock space, but could be part of the transportation mix for areas outside of the Greater Toronto Area (e.g., Windsor).
- These may be longer-term options; cost will be a key consideration.
- If fuel prices continue to increase, there will be more interest in these modes.

G. Ways Forward

11. There would be merit in designating all aggregate operations in the Province under the *Aggregate Resources Act*.

Agree: Participants agreed that the ARA should be applied across the Province of Ontario, as there is a need to level the playing field.

Caveats:

- MNR currently does not have the capacity to ensure Province-wide implementation. The issue of MNR capacity to enforce would need to be addressed.

12. There would be value in all parties working together to develop a long-term strategy for aggregates by 2008.

Agree: Participants agreed with the statement, citing the need to learn from the previous multi-stakeholder process that was not successful.

Caveats:

- There is a desire for government leadership (i.e. through MNR) and coordinated participation of other relevant ministries.
- It will be important to establish a multi-stakeholder structure that is supported and mandated by the Province. The stakeholders at this Round Table should be involved, and there may be a need to involve others (e.g., academia).
- An appropriate timeline and should be established and respected for strategy development.

- The strategy process should address/consider:
 - Development of a common municipal policy framework, based on common principles and consistent standards and enforcement procedures;
 - Changes to ARA/regulations (e.g. reversing changes to Section 66, public involvement and municipal role to make a stronger link between local land use planning and the approvals process);
 - A resource conservation strategy;
 - Continued work on the Consolidated Statement of Facts;
 - Updating of relative information/data; and
 - A monitoring procedure.

6.0 SUMMARY AND CLOSING REMARKS

Gord Miller, Environmental Commissioner of Ontario

Mr. Miller provided the following observations on key themes and conclusions emerging from the Round Table discussions:

- Public trust in the process is a key need.
- We need a better handle on the state of aggregate reserves and aggregate demand. A central repository of information is considered necessary.
- There is a call for more integrated decision-making on issues like recycling, and a value in empowering municipalities to take on an enhanced role – also connected to the issue of trust.
- We want to minimize confusion and conflict and support good decision-making processes.
- Work is needed on a policy framework, on an improved regulatory response and on the approvals process. This is a multi-billion dollar industry, that needs a regulator. Consider for example, what a mere one cent/tonne fee increase might achieve; it could double the resources for MNR on this issue.
- Protection of the existing transportation infrastructure is paramount, as is protecting corridors and dock sites for long-term future alternative transportation modes, such as rail and water.

Mr. Miller thanked the participants for attending the Round Table and for their contributions. He indicated that participants will be sent a copy of the Round Table report, once it has been prepared.

APPENDIX A: ROUND TABLE AGENDA

8:30 a.m.	Registration and Refreshments
9:00	Welcome and Opening Remarks – Gord Miller, Environmental Commissioner of Ontario
9:10	Agenda Review and Introductions – David Dilks, Facilitator, Lura Consulting
9:20	Introduction of “Statement of Facts” <ul style="list-style-type: none">• Discussion
9:35	Facilitated Discussion of Key Themes <ul style="list-style-type: none">• The Need for Aggregate• Challenges for Close-To-Market Aggregate Sources
10:30	Break
10:45	Facilitated Discussion of Key Themes (continued) <ul style="list-style-type: none">• The Need for an Accurate, Current Inventory of Reserves, Consumption Trends
12 noon	Lunch (Provided)
12:45	Facilitated Discussion of Key Themes (continued) <ul style="list-style-type: none">• The Potential for Aggregate Conservation• Opportunities for Alternate Sources
2:30	Break
2:45	Facilitated Discussion of Key Themes (continued) <ul style="list-style-type: none">• Options for Transportation of Aggregates• Ways Forward
4:15	Summary and Closing Remarks – Gord Miller, Environmental Commissioner of Ontario
4:30	Adjourn

APPENDIX B: LIST OF PARTICIPANTS

The following is a list of participants who attended the Aggregate Round Table. *Email addresses are provided for the participants who gave permission to share their information with the group.*

Name	Affiliation	Email Address
Carol Hochu	Ontario Stone, Sand & Gravel Association (OSSGA) (formerly Aggregate Producers Association of Ontario)	chochu@ontariossga.com
William Galloway	OSSGA (Dufferin Aggregates)	BGalloway@stlawrencecement.com
Greg Sweetnam	OSSGA (James Dick Construction)	gsweetnam@jamesdick.com
Moreen Miller	OSSGA (Lafarge Canada)	Moreen.Miller@lafarge-na.com
Roy Bertolo	OSSGA (Brandes Aggregates)	
Janet Stavinga	Association of Municipalities of Ontario	janet.stavinga@ottawa.ca
Bradley Shaw	Coalition of the Niagara Escarpment	cone@niagaraescarpment.org
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Brian Hollingsworth	Ministry of Natural Resources	
Rob Taylor	Ministry of Natural Resources	
Stuart Thatcher	Ministry of Natural Resources	
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Radovan Gjaic	Pond Aggregates	pondaggregates@rogers.com
Aldo Salis	Puslinch Township	aldos@county.wellington.on.ca
Matthew Bulmer	Puslinch Township	corwhin@sentex.net
Marolyn Morrison	Town of Caledon	Jennifer.innis@caledon.ca
Dan Kennaley	Town of Caledon	
Workshop Organizers and Facilitators		
Gord Miller	Environmental Commissioner of Ontario (ECO)	
Ellen Schwartzel	ECO	ellen.schwartzel@eco.on.ca
Greg Jenish	ECO	
Lisa Shultz	ECO	
Jim Adam	ECO	
David Dilks	Lura Consulting	ddilks@lura.ca
Liz Nield	Lura Consulting	lnield@lura.ca
Requests for Correspondence (but not in attendance)		
Jeff Seaton	Municipal Engineers Association	jseaton@ptbo.igs.net
Scott Vokey	Association of Municipalities of Ontario	svokey@amo.on.ca

APPENDIX C: DETAILED PARTICIPANT FEEDBACK

A. The Need for Aggregate

1. **Consumption figures for the last decade indicate that overall aggregate consumption has been increasing by 2 – 4 % per year in Ontario; under a business-as-usual scenario, this trend is likely to continue.**

Host Municipalities

- Under a “business as usual” (BAU) scenario the statement is true. Even if we grow by one more person, we have significant highway catch-up needs. If we want to keep the economy going, we should follow BAU.
- Do not see general agreement on this statement.
- Take a long-term approach. The change in growth patterns will increase demand.

Industry

- Industry uses population data as one of the elements in looking for new licensed sites and also management of reserves.
- Recycled material is in short supply, and there are issues with recycling locations (e.g., storage of recycled materials in yards but not in pits/quarries).
- Regional information on growth projections do exist, APAO members have this information.
- Sand and gravel is in short supply regionally.
- We need a framework that will work for all parties.
- 2-4 % is accurate for a growth-based economy if population continues to grow.
- Canada is growing and Ontario is taking a large share of the growth.
- Ontario is in need of roads/infrastructure to service a growing population. Aging infrastructure is in need of renewal.
- Any development requires vast quantities of aggregate.

Municipal Representatives

- Existing demand and new demand should be reviewed.
- Ontario’s current consumption practice is not sustainable.
- BAU should not continue – there are surges in demand.
- Recycling will not provide more supply. Use homebuilding statistics to get the consumption numbers.
- Need to reference the source of the 2-4% number.
- New technology and building materials may impact the demand.
- Suggest that alternatives (e.g., recycling) are reviewed.
- Intensification/growth within GTA may impact this number (less infrastructure needs)?
- Need to understand existing licensed reserves (possibility that growth can be accommodated in current pits/quarries).
- This information is not public.

Provincial Agencies

- Anticipate that demand will not increase as much because of new provincial growth policy (e.g. intensification, compact growth) – half of today's growth is projected.
- Increases can be expected as some existing infrastructure will need to be replaced soon.
- Ontario's per capita requirements are higher than many other countries due to "Canadian Climate" i.e. freeze-thaw cycles.
- It will be difficult to find practical alternatives to building infrastructure and roads without using aggregates.
- Anticipate that the economy and population will continue to grow.
- Growth cannot be assured depending on economic conditions in northern Ontario (forest and mining industries).

NGOs

- The issue is more complex than the statement suggests, there have been slight drops in consumption – think about what drives consumption.
- How will the new planning regime affect these projections?
- Agree, if this statement reflects current urban development trends, current highway use patterns etc.
- Statement is true, if population and job growth taper off as population ages (see Neptis Foundation/Will Dunning Inc. report released. Jan 17/06).
- Ongoing pressures from communities re: land use conflicts will increasingly prevent BAU (need to protect farmlands and natural features).
- Consider population and employment projections.
- Change in growth patterns with provincially mandated urban intensification.
- Social demand for smaller homes in GTA/GGH.

B. Challenges for Close-To-Market Aggregate Sources

- 2. Under projected population growth plans, and if per capita aggregate consumption rates are maintained, it will become impossible by 2020 to satisfy the aggregate needs of the Golden Horseshoe area from local sources.**

Host Municipalities

- Caledon did supply/demand analysis – it fluctuated according to type of materials. There were no pits with under a 20-year supply, some had a 50-year supply for the Golden Horseshoe.
- We need to balance the need for more aggregate licenses with other needs, such as water.
- Caledon's supply/demand analysis indicated that there was more supply available than would be required through 2020 in Caledon. Those assumptions included reliance on historical share of supply remaining (Caledon's share of the GTA West Market) remaining the same.

Industry

- All aggregate is not created equal; e.g., stone supply in western GTA is very limited. No new licenses since 1972, suggest possible exhaustion of supply for 2010. We are not running out of stone, but we cannot find a quarry site.

- Projections in Caledon are unlicensed – and would supply 0-10% of the GTA's demand.
- We have rich deposits in Southern Ontario, but cannot access them close to the market (GTA).
- Current planning framework is making it difficult or impossible to bring local source to market (trend can be reversed by planning policy).

Municipal Representatives

- New applications could be approved under the Provincial Policy Statement.
- Data is not available to formulate an opinion.
- Experience with Niagara Escarpment Plan is that most/all applications get approved using threat of shortage.
- Policy weight of government is still to allow extraction.
- Less land-use conflict may result as a result of Greenbelt and ORM plans (growth is focused on urban areas).
- This statement is “status quo”, based on current analysis.

Provincial Agencies

- Information is not currently available to the public.
- Depends on aggregate type – we import some aggregate from Eastern and Central Ontario.
- Definition of “local” is expanding. May have to find alternatives/options for aggregate extraction.
- If economics of production change, close-to-market materials can be developed.

NGOs

- Consumption is currently above production.
- Overall concern that applications may become focused in the Greenbelt.
- Statement is true, if increase in consumption rates and population continues.

Regulating Ministry

- There is plenty of aggregate available, the question is whether it is accessible.

3. The siting of new aggregate extraction operations will become increasingly difficult and contentious in the Golden Horseshoe area.

Host Municipalities

- Good experiences in past with good producers but municipalities no longer have power over the industry. Since the Province took responsibility; there is a high level of distrust among the public.
- Environmental consciousness is growing within the public realm.
- We had constant conflict years ago – sat down with producers, government, and stakeholders to develop resource and reserve areas.
- We have agreed on the approach years ahead of time, so the Town of Caledon will have less conflict.
- Lack of public confidence.
- Changes to ARA have made it difficult for municipalities to regulate.
- Approvals process is onerous; we need to create a more useable framework.

- Previously environmental and social/community impacts haven't been properly accounted for. There are ways to manage the process through concepts such as prioritization that make the process more rationale and predictable.

Industry

- Industry relations with host communities are improving. Aggregate producers improve their approach with community feedback.
- Siting will continue to be difficult.
- Anywhere in Ontario will be difficult for applications. Michipicoten in northern Ontario was hugely contested.
- Request that MNR put together a Framework. Industry would use it going forward.
- We know that every community has Official Plan and planning constraints. There will be a shortage by 2020 – information is proprietary.
- The resource is in the Greenbelt therefore there will be conflict.
- Need to find alternative materials to substitute for resources.
- Aggregate lands are being rehabilitated back to full productivity.
- Approvals process is onerous.

Municipal Representatives

- Scepticism will exist with public until they are confident in the process.
- The public wants to be engaged – more data on aggregate sources must be available.
- There is a view that government is working with aggregate producers and not impartial.
- Because there is contention, it doesn't necessarily mean that pits/quarries licenses are refused.
- More contention means more conditions and more engineering.
- People move to rural areas to get away from industrial uses.
- Rural areas are viewed as Greenbelt for urban areas.
- Public more protective of natural, ecological resources.
- Quarries/pit locations are licensed in a piece-meal manner by private operators.
- Difficulty is not necessarily a bad thing.

Provincial Agencies

- Caledon story shows that contention doesn't have to be the way of the future.
- Proper resource management principles need to be advanced. Reduce conflict rather than heighten it – say when and where you can and cannot open a pit/quarry.
- No one wants a pit/quarry next door to them.
- Hearings are getting longer, more studies required to satisfy environmental concerns.
- Increase of environmental concerns especially related to ground water.
- Public expects "green" does not include "disturbance" created by pits/quarries.
- Hard to imagine process becoming more difficult and contentious than it is already.

- If the system becomes more difficult, extraction will not take place – society will pay to import aggregates or increasingly deal with a bad transportation system.

NGOs

- People no longer believe government or proponents. Public believes that the government is in cahoots with producers. They are even sceptical of the Niagara Escarpment Commission.
- There is a difference between GTA and rural areas; this is not just a local issue.
- No disagreement with this statement.
- Conflict is not necessarily a bad thing – results in better production practices.
- Shift from producer to ministry approval process.
- Generally agree – however, the site-by-site approach does not deal with increasing concentration of sites. Ontario has to take landscape level approach.
- There will be increasing land use conflicts (community opposition) and need to protect the best agricultural land and highest biodiversity in natural areas of all Ontario.
- It is more contentious here than elsewhere (northern Ontario) because of the high quality of aggregate features in Golden Horseshoe and population density.
- Much land is not available due to provincial law and policy.
- Increased contention isn't necessarily bad – it may lead to a better aggregate operation if there is good community opposition.

C. The Need for an Accurate, Current Inventory of Reserves, Consumption Trends

4. There is a need to update the 1992 State Of The Resource Report (SOR), and to provide up-to-date information on aggregate reserves, aggregate consumption patterns and trends, including conservation and recycling trends.

Host Municipalities

- Information has to be collected by a publicly trustworthy agency. If it has implications for public policy – the information can be confidential.
- In regard to supply, constraints are solving environmental, social and community issues.
- The need for data is connected to public policy charge and legislative charge.
- There may be additional information not addressed in the 1992 SOR Report that needs to be collected.

Industry

- Aggregates are not a public resource (same as agricultural land), it is privately owned, and bought at a great expense.
- The Ontario Aggregate Resources Corporation's (TOARC) information is public; it is on the website and can be obtained at MNR.
- There is other information that producers collect which is not given to TOARC
- Reserve information is confidential.
- Producers need to know what information is needed and it can be provided.

- We do not share competitive information; that information is for use in the marketplace (competitive strategy).
- There is a difference between environmentalism and “not in my backyard”.
- The basic conclusions in the SOR Report are still sound and echo the previous study – the answer is still that we have a problem; we will have failed as a society if we import aggregate to the GTA.
- Both the quantity and quality of aggregate needs to be considered.
- Every Official Plan should be getting direction from the Ministry on long term land use planning.
- All applications since 1997 include reserve information, older licences do not.
- Some municipalities still fundamentally misunderstand supply/demand economics.
- Old study (PEIL 1991) still relevant and was generally accurate.

Municipal Representatives

- Industry cannot hide behind ‘propriety’, if they do, public distrust will continue.
- Move beyond the “business as usual” approach.
- When you have ample reserves – the public questions why more licenses are being issued.
- The current provincial policy will not allow constraints.
- Strongly agree with the statement.
- The mining of aggregate must be justified in the same way as other land use applications (e.g., do we need more?).
- A municipality can state that existing housing reserves are adequate, and that there is no need to expand this boundary – but a municipality cannot take that approach for aggregate applications.
- The issues around this always appear to be hidden.
- Revisit the issue of “need”.
- 1992 SOR Report is 14 years out of date, and this is unacceptable for planning purposes.
- Even monitoring of impacts is not done in a comprehensive manner.
- Government refuses to make provision of information mandatory.
- We wouldn’t approve any other land-use without full and open justification.
- Concern that policy is being developed in the absence of data.
- SOR Report should include data on amount of recycling and types of materials being recycled.

Provincial Agencies

- Even if all reserve information is available, resource extraction cannot be constrained. The public would like us to cap new licensing – but we are not able to under the current policy framework.
- We all need to be working with an up-to-date database.
- The landscape has changed in several ways (new source areas, new technology, growth patterns, recycling, etc.).
- Information is largely available at a regional level.
- Industry-held information is proprietary – but what if that information is needed.
- Good, current Information is necessary and will allow better-informed discussions.

NGOs

- The information is out of date.
- Basis of information is not in the public realm.
- Far greater transparency is a pre-condition of social licence to operate for APAO.
- Public mistrusts the industry data.
- TOARC collects data, and educates the public.
- TOARC is owned by APAO.
- Disillusionment caused by legislative problem.
- SOR report – concern that MNR does not have the necessary information to manage the resource.
- TOARC is not the appropriate organization to hold the information.
- Industry will have to be more transparent.
- The line between industry and government is blurred.
- How can we plan for land-use without knowing how much aggregate the industry actually needs in order to meet demand and what reserves are there.
- Who does the updating – should be MNR not TOARC.

Regulating Ministry

- There are a number of items in the 1992 SOR Report that would not need to be repeated (e.g., land use planning and history component). We are on record that we will pursue certain statistics.
- We agree that information is needed.
- The key is gathering the right information for public policy decisions.
- Need to determine who gathers the information; doesn't matter who gathers it.
- MNR does not have the resources.

D. The Potential for Aggregate Conservation

- 5. There would be merit in examining existing design standards for roads, highways and other infrastructure (in relation to both the quantity and types of aggregate specified) to identify options to conserve aggregate.**

Host Municipalities

- Yes, but it is important to look at the question holistically (e.g., concrete pavement uses less aggregate but may result in more pollution).

Industry

- Agree with statement.
- Municipalities restrict recycling in pits.
- I agree, but the standards are already relatively sophisticated.
- Most available recycled materials have already been recycled.
- Recycling sites should be available in pits.

Municipal Representatives

- Recycling in pits is not a problem, but a recycling facility would be a long-term commitment. Municipalities and neighbours do not like that idea.
- MTO Design standards are not being used by municipalities; they will not allow recycled materials.

- Warranties are up to 7 years; therefore contractors use more aggregate, not less.
- Asphalt is not considered a good quality aggregate. Tires, glass and ceramics have been disasters.
- High quality aggregate is needed for “Superpavement”.
- When using recycled concrete, new material will always be required (quality and integrity of material).
- Road widths are being looked at; nobody wants poor quality roads.
- Agree as it results in less demand for aggregate.
- As long as different standards do not result in other costs to society (e.g. fast road wear, safety issues).
- The standards must be consistent across Ontario.
- Unsure how this would contribute to conservation.
- Assume recycling is part of this question.
- Include the notion of public transit and intensification of urban areas.
- Recycling facilities should not become permanent industrial uses in worked-out pits and quarries.
- Cost-benefit analysis needed (cost over time).

Provincial Agencies

- MTO will move to 15-20 year warranties by 2020.
- Need longer term, higher quality materials – not necessarily higher quantities.
- Some success seen with finely ground tires – however, may not allow recycling.
- In some case, surface damage can be resolved.
- It is more economical to use concrete pavement on high traffic roads – uses less rock. However, this produces more greenhouse gases.
- On lower traffic roads, concrete is not economically attractive.
- Allow/demand use of recycled material in municipal roads.
- Restrict land filling of waste materials (concrete/asphalt).
- Allow examination of road design width/gutters/depth.
- Exclude 400 and high volume two lane highways.
- Agree – however we have found that the use of thin/inadequate standards result in reduced life of pavement and will require rebuilding long before anticipated.
- Concrete roads use less aggregate than asphalt roads but concrete roads usually cost more money. Concrete roads are usually only economical on high traffic roads.
- Need to balance energy consumption/aggregate consumption issues so as to minimize damage to the environment. Society needs to make appropriate decisions to balance costs and environmental impacts.

NGOs

- Useful to explore design standards and material substitution.
- There have been no serious efforts to model out alternate development standards.
- Need cost-benefit analysis.
- There are other waste management issues around road standards (e.g. parking lots, road width, curb, and gutter).
- More information would be useful.

- Changes in patterns of consumption – we have not discussed implications of more compact urban form.
- There are lots of good reasons to look at this – e.g. accountability, liability, etc.
- Is the UK using a higher proportion of recycled material (consumption patterns can change)?
- Alternative development standards (ADS) – see MMAH manual published in 1992-93 – ADS could contribute to MTO's technical assessments.

Regulating Ministry

- Encourage recycling to be promoted by municipalities.
- Look at difference in emissions in atmosphere i.e. One Tonne Challenge.
- Need to use local resources.
- Leslie Street Spit is still open and concrete is being dumped in Lake Ontario.
- Suggest that a cooperative program is established with Natural Resources Canada (NRCan) – NRCan currently collects data for Statistics Canada on Mineral Statistics. Might be interest in collecting data on recycled, in situ or imported aggregate.
- Suggest that MNR might be interested in collecting recycling data.
- UK uses 200 MT/year of virgin aggregate.
- Types of consumption patterns will change.

6. More effective use of existing licensed aggregate sites is feasible, and would reduce the pressure for greenfield sites and expansions.

Host Municipalities

- If this statement links to recycling, municipalities are justifiably cautious.
- Municipalities do not have sufficient control over operations after the approval is given.
- Policy framework needs improvement including ARA.
- Municipalities are concerned with enforcement and monitoring – suggest that there may be more efficient ways than the current system.
- Producers and municipalities should work to contain the area i.e. use the road between two pits.
- There needs to be open and creative ways to use pits (flexibility) e.g. rowing venue. This would require support from MNR and MMAH (\$\$).
- There is room for 3-4 rowing venues – public would prefer to see greenfield sites returned in some cases.
- Less resistance to horizontal disturbance and more vertical distribution.
- Municipalities are not too worried about recycling in pits.
- Yes, but there are aspects of it, such as recycling, where municipalities have to be justifiably cautious because the existing policy and legislature framework do not allow municipalities to exert sufficient control over such activities.

Industry

- Option is to go further below water table e.g. 140' below water table – extract more from each footprint.
- Industry has changed a lot since the 1900's.
- Legacy issue, we took the best first from site; what is left is marginal.

- Would like to import scarce materials (recycling onsite) to add to existing sites – have to get better at using fringe materials.
- There is always a “waste-stream” of silt that is left behind.
- The industry is learning to improve.
- Trend is toward using higher quality aggregates; cost of aggregate is 1% of structure, no one will compromise integrity of structure. Using lower quality material is not the answer.
- Suggest comprehensive rehabilitation.
- Industry is not opposed to conservation.
- Interested in dredging options.
- Set up processes for evaluation and monitoring – develop a framework.
- Trend toward higher quality materials, so this may not be feasible.
- High quality of resources will need greenfields or expansions.

Municipal Representatives

- Disagree with reducing buffers and setbacks etc, this approach would make a mockery of the whole process.
- Quarries are a permanent use.
- Collectively need a stronger policy framework.
- Substantial time goes into the approval of a pit or quarry – once established it is inappropriate to change the rules.
- If question indicates using marginal material then this can be supported provided the rules of the license are honoured.

Provincial Agencies

- Look at the entire scale of the deposit – not just pit by pit.
- Often you cannot go deeper in quarries because the rock quality does not exist.
- There are penalties for extracting material under the water table – therefore it is avoided.
- “Blend” imported material with remaining material to generate/produce higher specification products.
- Higher specifications for products in the future will make this more difficult.
- Minimize landscape disturbance.
- The quality of the quarry floor is defined in many cases by rock quality or hydro constraints.
- Environmental requirements to protect water resources provide an incentive to stay well above the water table.

NGOs

- This statement does not fit with the Conservation Strategy. Conservation equals reduced demand – this question doesn’t relate directly to it.

7. Annual licence fees and royalties should reflect the full societal and environmental costs of aggregate extraction.

Host Municipalities

- There is an imbalance between host and benefiting community.
- Fees need attention – need to cover the costs, don’t need to make a profit.

- A related mechanism should be developed to redress the imbalance experienced by host communities whereby they must absorb a disproportionate part of the costs associated with aggregate extraction.

Industry

- Municipalities are the larger consumers of aggregate; so municipalities will pay more if fees increased.
- Not aware of the program offered by municipalities to fund the administration costs.
- Annual licence fees should not necessarily cover program costs.
- Change structure of fees – suggest paying more for crown land.
- Fees currently go into general revenue stream and the government decides what to give to MNR.
- Not opposed to higher fees.
- UK APAO has a complete and unfettered authority to provide aggregate – this is the flip side of higher fee structure approach.
- The key is to get the government to attribute the fees to the aggregate program.
- Clayton Research was commissioned by us to look at costs – the study determined that the fees do cover the municipalities' costs. Will make study available to the ECO.
- In regard to waysides, ARA 1997, applications rose dramatically – not quite equal.

Municipal Representatives

- Strongly agree with statement.
- This is an area of strong frustration by municipalities.
- If fees are changed – be cautious about impacts on wayside pits.
- Disagree with APAO research study. There is a multiplicity of demand with a limited property base. In real life the fees do not cover municipalities' costs.
- Imbalance between host municipality and benefiting municipality; areas of aggregate demand are not necessarily near aggregate operations.
- Agree – faster conservation and wise use would likely result in less use of materials.
- Public must be aware that prices/taxes will rise.
- Money must be used to offset only those costs from aggregate extraction and should not be moved to province's general revenue streams.
- This approach could cause move to more waysides. This is inappropriate since there is less environmental rigour associated with waysides. The approval process is less rigorous than obtaining an actual licence. Environmental costs may be the same for a wayside.

Provincial Agencies

- We need to decide if we want to use this mechanism to control consumption (which is an implication of this proposal).

NGOs

- Higher costs would help to reduce demand – encourage more wise use of the resource.
- Existing fee structure does not currently cover MNR's administrative costs.

- MNR's capacity is limited and needs to be strengthened.
- Suggest a form of subsidy (if administration costs are not covered).
- Need to move towards internalizing costs.
- Need to increase fees.
- MNR needs more staff.
- Need close examination of how the increased fees in UK, Sweden and Denmark actually work, and their impacts on industry, private sector etc.
- Complexity of dealing with the fact that the majority of purchasers are public sector.
- Provincial purchasers "move" money around.
- Municipal purchasers – serious financial impacts.

Regulating Ministry

- Currently royalties are dedicated to crown lands (\$) by regulation; this has not changed in a long time.
- Fees are dedicated to private lands (\$) by regulation.
- \$700,000 – 1M/year received from Crown Lands.
- \$1.4M/year (approximately \$0.06/tonne) charged in licence fees by the Province.
- Direct expense by MNR is \$1.8M/year.
- MNR would welcome more resources – but what should be factored in?
- Where do we pay these royalties – our international competitive advantage needs to be maintained.

E. Opportunities for Alternate Sources

8. There are additional opportunities to extract and ship aggregate from northern Ontario.

Host Municipalities

- Agree, as was pointed out it's happening now and as the supply in Southern Ontario becomes more constrained, as a result of environmental and social/community impacts, these opportunities are only going to increase.

Industry

- Think about the costs, expense, shipping, and the need for Environmental Assessments.
- Not much supply in GTA – great supply close to GTA.
- Eastern seaboard has good docking facilities.
- Toronto Port is poorly equipped.
- Move growth to Northern Ontario – not Southern Ontario.
- The quantity of shield being shipped to Southern Ontario is small.
- Ship materials from Manitoulin to Collingwood – and ship down from Georgian Bay.
- Shipping from northern Ontario not be a responsible alternative to supplying GTA stone, 20 km from market, compared with shipping aggregate 1000km by ship and then truck it 50km from harbour.

Municipal Representatives

- Agree – less likely viewed as contentious in the north (e.g. jobs and less population).
- Must designate under ARA and regulate these sites.
- Environmental & social impacts should not be transferred to other jurisdictions.
- Economics may not justify this option.
- Better to conserve, recycle and change standards.
- This is a long-term consideration because of infrastructure needs: ships, rail lines, roads and harbours.

Provincial Agencies

- Suggest looking 2-3 generations ahead.
- Should plan for receiving areas downtown Toronto.
- There is lots of opportunity in supply.
- Potentials for “super-quarries” along Great Lakes.
- Define location of Northern Ontario.
- Transportation infrastructure (docks, rail).
- Consider transfer points.
- Additional cost for shipping.
- Think about location of docking facilities in Southern Ontario.
- This is the future. We have the opportunity to plan for this now.

NGOs

- We are already shipping from the shield – we need to look at other options.
- Each quarry has unique impacts.
- Northern Ontario aggregate should not be used for export to the US (although not prohibited by Provincial Policy Statement).
- We should rigorously reduce demand for aggregate before we embark on major utilization of Northern Ontario aggregates.
- Consider energy impacts (GHG emissions).

Regulating Ministry

- Manitoulin Island is environmentally significant – this option may not be practical.

9. It would be worthwhile to investigate the potential for underground mining of aggregate, as well as underwater dredging of aggregate.**Host Municipalities**

- There may not be much potential for underground mining.
- Would like to hear what a more impartial source might say.

Industry

- Lafarge does some underground mining (primarily in US); site conditions in Ontario are quite different i.e. water table is very low.
- Underground mining is technically easy – go 100 feet deep; extract 600 tonnes per day. Less than \$3M investment; cost would be approximately \$1.60 -1.80/tonne. Approximately 1 billion tonnes could be extracted from the mouth of the Niagara River.

- Lake mining is ambitious – unless there is government support.
- Dredging not economically feasible.
- Surface mining is riskier; the Ministry of Labour is now pushing due diligence for pits and quarries around health and safety issues (reduces risk).
- Not economically feasible.

Municipal Representatives

- Should be studied to determine feasibility in Ontario (e.g. depth of bedrock, water issues, competition).
- Cost is an issue if other operations are still open pit.
- Theory sounds good but is it workable in Ontario (groundwater)?
- Mining under water may be problematic – could have major environmental issues (fisheries, water ecology).
- Safety issues.
- Long-term study needed.

Provincial Agencies

- Underground mining is likely not economically feasible.
- Some preliminary studies were conducted by MNDM and MTO in the mid 1980s.
- No harm in investigating.
- Excess cost.
- Considerations are thickness of formation; rehabilitation of sites; land assembly; and, ground water.
- Encourage use of waste minimizing rock in North Michigan/Ontario where appropriate. Will require rail/water transport.
- Underground mining will not be economic in Southern Ontario for a very long time because of absence of excellent sites.
- There is a limited resource of aggregate for dredging – or perhaps a lack of information.

NGOs

- Consider fishery habitat issues and Source Water Protection constraints.

Regulating Ministry

- Safety issues need to be considered.

F. Options for Transportation of Aggregates

10. The feasibility of transporting aggregate in less energy intensive ways (including water and rail) deserves to be examined.

Host Municipalities

- Not that long-term – just need a shift in gas prices.
- Keeping rail lines is imperative.
- This is happening to some degree – it creates additional potential that takes the pressure off Southern Ontario sites in light of environment and social community impacts.

Industry

- Alternative transportation is a great idea – however, the rail infrastructure has been lost, and we do not have the rail lines.
- Alkaline reactivity of northern rocks can be a problem.
- See potential for this beyond 2020.
- Water transportation is feasible for Windsor, Sarnia but not for GTA (exchange rate in US drives it).
- Consider existing transportation infrastructure. Rail is 3-4 times more expensive than truck shipping.
- Not economically feasible.

Municipal Representatives

- Agree, in theory more efficient and less fuel required.
- Enables movement of larger quantities.
- Depends on oil prices rising (\$100.00/barrel of oil).
- Rail and water facilities are largely now gone.
- New investment needed.
- Study/cost benefit environmental and social.
- Need storage areas and trucks from such areas from shipping.
- Moves problem to another area (Northern Ontario).

Provincial Agencies

- Preservation of dock spaces, rail lines and existing corridors is imperative.
- Limited rail infrastructure.
- Need dedicated transfer points.
- Railways want large volumes.

NGOs

- Has MNDM compared proximity of rail lines and aggregate deposits.

Regulating Ministry

- Less energy intensive – look at full cost options.

G. Ways Forward

11. There would be merit in designating all aggregate operations in the province under the *Aggregate Resources Act*.**Host Municipalities**

- Support – but don't take inspectors away from Southern Ontario.
- All the ones in Caledon are already under the ARA.

Industry

- Support this statement.

Municipal Representatives

- Agree – bring consistent regulations to all of Ontario. Every area is equally important. Ensures rehabilitation and fees are part of the licence.
- Must have resources to administer.
- May need to be phased.

Provincial Agencies

- Would level the playing field.
- Better control and reporting.
- Need government resources (staff).
- Dealing with distribution of fees.

NGOs

- Support for statement.
- Levels the playing field.

Regulating Ministry

- Challenge is designating all of Ontario.
- Licence costs would be required for remote areas – this would level the playing field.
- More resources are needed.
- This would affect areas needing forest access roads.

12. There would be value in all parties working together to develop a long-term strategy for aggregates by 2008.**Host Municipalities**

- Need to look at ARA (e.g. Issue with Section 6.6: Changes to the site plan without approval of municipality).
- Concern that EBR notification is not comprehensive enough.
- Supports aggregate strategy: short-term and long-term.
- Look at policy framework and ARA – is there a better way?
- Maybe municipalities need to deal with enforcement.
- Why are there two approval processes – municipalities do not want to give up their rights for a number of reasons (e.g. public participation).
- Municipalities should have the ability to enforce.
- We don't have the resources to deal with all of the enforcement.
- Need to see some meaning in a site-plan.
- Stop talking about "interim land-use".
- Would like to sit at table on short-term commitment.
- There are many issues and problems that need to be addressed.
- But it shouldn't be just a long-term strategy. There are some aspects that must be addressed in the shorter term too.

Industry

- Need a "boiler-plate" municipal aggregate policy (that can be adjusted by municipalities) – this model could be used throughout the Province.
- Need a common municipal framework.
- SOF would be useful.
- Need common principles across Ontario.
- Need some common definitions.
- Moving to underwater licencing has created issues.
- Municipalities enforcing operations will simply not work; should pass complaints on the producers.
- Keep provincial level framework.

Municipal Representatives

- Request timeline for strategy.
- Municipalities need more empowerment and safety valves.
- Aggregate strategy and conservation strategy should be linked.
- Desire for MNR to show leadership.
- Conflicts with a number of Provincial Policy Statement priorities.
- Get the right people around the table.
- Need to work within some Provincial direction.
- Issue when moving from reserve to extraction.
- Minor site plans – often a great concern to locals, municipalities cannot monitor registry weekly.
- Present process is time consuming, costly, involves great amounts of litigation, staff and legal time.
- Hearing based – winner takes all.
- No one is served well by process – stakeholders, public, agencies, Ministries and industry not on same page.
- Province solved sprawl issue and should now move to resource prioritization.
- Clarify roles.
- Need some up-front direction from Province and then work within that framework.
- Needs changes to legislations (who does what).
- More municipal and agency control (public better served).
- Must solve availability of data issues (need, justification).

Provincial Agencies

- Ontario has been a leader in aggregate planning; therefore there have been high aggregate costs.
- Planning of future extraction would benefit Ontarians.
- Tie with MNR resources conservation initiative.
- Start with revising agreed statement of facts.
- Develop shared information base.
- Don't make all concerns of all parties the definition of success.
- Is this a long-term "conservation" strategy or is it a long-term strategy – Which may lead to conservation initiatives as well as others. This needs to be clarified.

NGOs

- Requested a strategy.
- When will public be involved?
- Don't get hung up on past failures (95-98) of working group, move forward from here – given level of energy seen at roundtable.
- Need agreement on information needs.
- Suggest that Sub-watershed planning process is used as a model.
- Agree with statement.
- MNR has committed to developing an aggregate conservation strategy through an internal committee and promised to invite the public (letter to Mark Winfield and Linda Pim – July 4/05).
- We need to stop or at least investigate the long-standing history of an ad-hoc approach to aggregate policy and practice.

- The land-use conflicts will magnify and become unmanageable in the GTA/GGH (and beyond) unless we do produce an aggregate strategy.

Regulating Ministry

- MNR is committed to developing an aggregate strategy for Ontario.
- Have had some internal meetings with MTO and MOE.
- Strategy initiated in 1995-1998 failed in the end – do not want to repeat that.
- Aggregate manual is currently being revised
- Regulations (operating standards) will be amended within 2 years.
- Legislation is more difficult to amend except by good government (omnibus bills).
- Currently MNR is in the Business Planning cycle – we have put forward some ideas (re: aggregate) and will know in 10-12 weeks if they can move forward.
- Need balance of municipal and provincial interest.
- Having heard discussion, will take it back to Minister.
- May need to bring some academics to the table.
- Decision may impact on economy of the province.
- Session and SOF has been helpful.
- There is merit of ongoing discussion.