

Worcestershire County Council's commentary regarding the annual production guidelines of other authorities

Site Address: Lea Castle Farm, Wolverley Road, Broadwaters, Kidderminster

Description of the development: Proposed sand and gravel quarry with progressive restoration using site derived and imported inert material to agricultural parkland, public access and nature enhancement

Application reference: 19/000053/CM

Appellant's name: NRS Aggregates Ltd

Appeal reference: APP/E1855/W/22/3310099

Introduction

1. With regard to the above appeal, the Inspector has requested a response from the Council in relation to where the +20% of the landbank uplift (specified in the latest published Worcestershire Local Aggregate Assessment (LAA)), sits with other authorities nationally, as different approaches are taken by Mineral Planning Authorities (MPAs) (or groups of MPAs) around the country to derive the annual production guideline in their LAAs.

Worcestershire's Local Aggregate Assessment and 20% uplift

2. The 'Worcestershire Local Aggregate Assessment: Data covering the period up to 31/12/2022' (see Core Document [CD11.08](#)), is the latest published LAA for Worcestershire. The production guideline within this LAA is derived from the 10-year sales average +20%. The Local Aggregate Assessment (LAA) at paragraph 1.7 provides a justification for this stating:

"1.7 This scale of uplift will support the continuation of recent supply levels and mitigate any potential impacts on the production guideline from the former County of Hereford and Worcester Minerals Local Plan (1997) being in place well beyond its expected implementation period (up to July 2022), which may have led to lower annual sales due to additional barriers to development rather than lower levels of demand. The 20% uplift will also support the anticipated scale of demand for housing and infrastructure development and allow some flexibility in relation to demand for HS2 and other development needs. This approach will be

kept under review in future LAAs, particularly to monitor the impact of the Worcestershire Minerals Local Plan (2018-2036) which was adopted in July 2022 and to reflect greater certainty about demand for HS2 once the project moves into a period of peak demand (which is likely to be reflected in 2023 and 2024 sales figures)”.

3. Paragraphs 9.8 to 9.11 of the LAA sets out the reason for the variation from previous approaches to identifying the production guideline:

“9.8 The production guideline for Worcestershire for the last 4 years (up to 2021 data) was derived from “the 10-year sales average +50%”. This uplift was based on the consideration of demand indicators at the time; HS2 was considered to be a “strong indicator for increase significantly above 10-year average” and gross housing completions were also considered as a (weak) indicator for a production guideline above the 10-year average. At the time it was noted that sand and gravel supply from Worcestershire is unlikely to directly supply HS2 but there was concern that additional aggregate extraction in Worcestershire could be needed in order help meet the demands placed upon aggregate supply chains in the West Midlands. This was in the context of a period of economic growth, particularly in the construction sector. In addition, confidence in the 10- year sales average as an indicator for demand was low because of the potential impacts of County of Hereford and Worcester Minerals Local Plan (1997) being in place well beyond its expected implementation period, thereby potentially depressing the annual sales figure due to additional barriers to development rather than lower levels of demand.

9.9 Given the discussion above relating to the changes to phasing of HS2 phase 1, the cancellation of HS2 phase 2a and 2b and the increased capacity within the region with the highest landbank in 10 years, the impacts of HS2 are now a weaker indicators for deviation from the 10 year sales average. In addition the draw-down impacts are likely to be less significant than previously anticipated because of a wider slowing of activities in the construction sector. Mineral demand dropped between mid-July and mid-October 2023, driven by weaker housebuilding activity and delays to key infrastructure projects amid persisting cost and planning challenges across key subsectors, particularly in roads. On a

quarterly basis, the sales volumes of ready-mix concrete and sand & gravel recorded the sharpest falls, down 15% and 12.2% respectively, the largest individual quarterly decreases in over a decade.⁶⁶ The scale of uplift has therefore been reassessed in developing the production guideline in this LAA.

9.10 Greater weight has also been given to the annual sales variation, which was not considered explicitly in the previous LAA, and the 3-year sales average as the impact of covid restrictions on longer term trends is now easier to see.

9.11 In addition, supply indicators need to be considered. Whilst some level of uplift above the 10 year average can potentially be accommodated, if the LAA were to continue to use “10-year sales average +50%” this would give a production guideline of 0.834 tonnes per annum. This level of annual provision has not been achieved in Worcestershire since 2003 and has only been met or exceeded in 3 of the last 25 years. It is therefore unlikely to be achievable, at least in the short term”.

4. It may be useful to note that the National Planning Policy Framework (NPPF) at paragraph 219 a) and b) requires MPAs to “*plan for a steady and adequate supply of aggregates by:*

a) preparing an annual Local Aggregate Assessment, either individually or jointly, to forecast future demand, based on a rolling average of 10 years’ sales data and other relevant local information, and an assessment of all supply options (including marine dredged, secondary and recycled sources);

b) participating in the operation of an Aggregate Working Party and taking the advice of that party into account when preparing their Local Aggregate Assessment”.

5. A draft of the Worcestershire LAA was sent to the West Midlands, East Midlands, South West and South Wales Aggregate Working Parties for consultation in November 2022 (see Appendix 1 of the LAA – Core Document [CD11.08](#)). Gloucestershire County Council supported the 20% uplift, and Staffordshire County Council queried how sustainable a 20% uplift was. Worcestershire County

Council responded to reiterate the rationale (see Appendix 1 of the LAA – Core Document [CD11.08](#)). No concerns were raised by MPAs or Industry about reducing the uplift from 50% (in the 2021 LAA) to 20% (in the 2022 LAA).

Other Mineral Planning Authorities

6. The Council consider that the majority of MPAs follow the 10-year sales average, but there are variations as outlined below. Such a variety may be expected to reflect the consideration of “*other relevant local information*” set out in paragraph 219 a) of the NPPF, which will differ in different locations.

West Midlands

7. In the West Midlands, only Worcestershire and Staffordshire have recently produced LAAs. The most recent [West Midlands Aggregates Working Party Annual Report \(published 2023, using 2022 data\)](#) includes Table 8 (page 39-41) setting out the position on Local Aggregate Assessments in the West Midlands (see Appendix 1 of this Note).
8. This confirms:
 - Staffordshire – LAA using 2022 data (stated as draft version in this table, it has since been published). Calculation method stated as “S&G [sand and gravel] *provision based on figure used in the Minerals Local Plan*”. Note, this is 5 million tonnes, which is 5.9% higher than the 10-year average of 4.722 million tonnes, but 3.8% lower than the 3-year average of 5.198 million tonnes (see Table in Executive Summary of [Staffordshire County Council Local Aggregate Assessment 2023 \(2022 Survey Data\)](#), page 4) (see Appendix 2 of this Note).
 - Herefordshire – LAA last published 2019-2020. Calculation method not stated.
 - Walsall – LAA last published 2015. Calculation method stated as “*The overall annual production requirement for sand and gravel in the West Midlands Metropolitan Area, based on indicative “apportionments” identified in Local Plans (1) and rolling average (mean) 10-year sales (2), is just over 0.5 million tonnes*”.
 - Solihull – LAA last published 2015. Calculation method not stated.

- Shropshire – LAA last published 2018-2019. Calculation method stated as *“Production guideline based on 10-year average. No other relevant local information which indicates deviation from this average is currently required”*.
- Warwickshire – LAA last published 2017. Calculation method stated as *“Production of sand and gravel based on the 10-year average of 2007- 2016 which strikes a reasonable balance between some years of economic growth and some years of recession”*.
- West Midlands Metropolitan Area (Birmingham, Dudley, Sandwell, Solihull, Walsall) – LAA last published 2015. Calculation method stated as *“Works on data collection and analysis started in 2023”*.

Other regions

9. Reports for all of the Aggregate Working Parties are available at <https://www.gov.uk/guidance/aggregates-working-parties-annual-reports>. The Council have summarised the position for each Aggregate Working Party from the 2022 reports (for sand and gravel where different approaches are specified for sand and gravel versus crushed rock):
 - East of England Aggregate Working Party Report, Table 10 (see Appendix 3 of this Note):
 - three MPAs use 10-year sales average,
 - one uses 10-year sales average plus 10%,
 - one uses Minerals Local Plan (MLP) policy rates, and
 - one uses MLP policy rates (sub-national apportionment figure).
 - East Midlands Aggregate Working Party Report, Table 11 (see Appendix 4 of this Note):
 - four MPAs use 10-year sales average,
 - one uses adopted Minerals and Waste Local Plan (MWLP) rate.
 - North East Aggregate Working Party Report, Table 10 (see Appendix 5 of this Note):
 - two MPAs use 10-year sales average,
 - one uses 3-year sales average,

- one uses apportionment of the national and sub-national guidelines for 2006 to 2020
- South East Aggregate Working Party Report, Table 10 (see Appendix 6 of this Note):
 - One MPA uses 3-year average sales
 - One MPA uses *“less than 10-year average sales and based on a variety of growth factors for forecasting”*
 - One MPA uses 3-year average sales divided in half
 - One MPA uses *“combination of 10-year sales data and growth factors including MPA forecast”* (resulting in an aggregates provision rate slightly below 10-year average sales)
 - One MPA uses Higher than 10-year average sales
 - One MPA uses 10-year sales average
 - One MPA uses Above 10-year sales average
- South West Aggregate Working Party Report, Table 10 (see Appendix 7 of this Note):
 - four MPAs use 10-year sales average.
- Yorkshire and Humber Aggregate Working Party Report, Table 9 (see Appendix 8 of this Note):
 - Requirement figures stated for two group of MPAs, not method used
 - No calculation method stated for one group of MPAs

Appendices

Appendix 1 – Extract of West Midlands Aggregates Working Party Annual Report 2023 [2022 Data]

Appendix 2 – Extract of Staffordshire County Council Local Aggregate Assessment 2023 (2022 Survey Data)

Appendix 3 – Extract of East of England Aggregates Working Party Annual Report 2022

Appendix 4 – Extract of East Midlands Aggregates Working Party Annual Report 2022

Appendix 5 – Extract of North East England Aggregates Working Party Annual Report 2022

Appendix 6 – Extract of South East England Aggregates Working Party Annual Report 2022 [Published December 2023]

Appendix 7 – Extract of South West Aggregates Working Party Annual Report 2022

Appendix 8 – Extract of Yorkshire and the Humber Aggregates Working Party Annual Report 2023 [2022 data]

Appendix 1 – Extract of West Midlands Aggregates
Working Party Annual Report 2023 [2022 Data]

West Midlands Aggregates Working Party

Annual Report 2023 [2022 Data]

December 2023

West Midlands AWP – AMR 2023 [2022 Data]

Correct as of this date: 19/12/2023

WMAWP Chair: Marianne Pomeroy, Worcestershire County Council,
MPomeroy@worcestershire.gov.uk

WMAWP Secretary: Dorottya Faludi, Capita, dorottya.faludi@capita.com

Local Aggregate Assessments

Each Mineral Planning Authority is required to produce an annual Local Aggregate Assessment which provides:

- An analysis of local aggregate supply;
- A statement on forecasted demand for aggregates; and
- An assessment of the balance between demand and supply.

Paragraphs 061-071 relating to [Local Aggregate Assessments](#) in national Planning Practice Guidance, and the [‘Practice Guidance on the Production and Use of Local Aggregate Assessments’](#) produced by the Planning Officers’ Society and the Mineral Products Association, provide advice on how this should be done.

Only Staffordshire and Worcestershire produced LAAs with data from 2021, and both have drafted LAAs with data from 2022. Herefordshire produced an LAA with combined data from 2019 and 2020 and Shropshire has an LAA with 2019 data. All other areas in the West Midlands either have LAAs that are over 5 years old or have no LAAs. Authorities in the area are facing resourcing issues which result in poor monitoring of the production and consumption of aggregates. This is negatively impacting updating their LAAs.

Table 8 2022 Local Aggregate Assessments in the West Midlands

Mineral Planning Authority	Complete (Yes or No)	LAA Figure		Calculation Method
		Sand and Gravel	Crushed Rock	
Staffordshire	No (2022 in draft version)	5Mt/a	n/a	S&G provision based on figure used in MLP/ no figure for crushed rock on basis that data is confidential due to single operational site.
Herefordshire	No (2019-2020)	0.16Mt	n/a	
Walsall	No (2015)	WMCA (in million tonnes) Permitted Reserves: 5.4, Unpermitted Resources in Walsall Area of	There has been no production of crushed rock in the West Midlands Metropolitan Area since 2007 when	The length of the landbank is calculated by dividing permitted reserves by the annual

West Midlands AWP – AMR 2023 [2022 Data]

		<p>Search: 6.4, [same] in Solihull Area of Search: 2.5 - Total Supply: 14.3</p> <p>There is currently a 7-year landbank of permitted sand and gravel reserves, and existing local plans make sufficient provision in Solihull and Walsall to meet longer term requirements up to and beyond 2030.</p>	<p>the last quarry closed, and there are no winnable deposits of crushed rock remaining in the Area.</p>	<p>requirement. The overall annual production requirement for sand and gravel in the West Midlands Metropolitan Area, based on indicative “apportionments” identified in Local Plans (1) and rolling average (mean) 10-year sales (2), is just over 0.5 million tonnes. Therefore, to provide a 7-year landbank the Area needs to identify permitted reserves of around 3.5 million tonnes in total.</p>
Solihull MBC	No (2015)	0.5Mt		
Shropshire	No (2018-2019)	0.71Mt	3.01Mt	<p>Production guideline based on 10-year average. No other relevant local information which indicates deviation from this average is currently required.</p>
Worcestershire	No (2021 LAA figures presented here, 2022 currently in draft version)	0.827Mt	>0 tonnes	<p>The 2021 data LAA proposes a deviation from the 10-year average for both the sand and gravel and crushed rock</p>

West Midlands AWP – AMR 2023 [2022 Data]

				<i>production guidelines.</i>
<i>Warwickshire</i>	<i>No (2017)</i>	<i>0.5Mt</i>	<i>N/A</i>	<i>Production of sand and gravel based on the 10-year average of 2007-2016 which strikes a reasonable balance between some years of economic growth and some years of recession.</i>
<i>West Midlands Metropolitan Area (Birmingham, Dudley, Sandwell, Solihull, Walsall)</i>	<i>No (2015)</i>	<i>N/A</i>	<i>N/A</i>	<i>Works on data collection and analysis started in 2023.</i>

**Appendix 2 – Extract of Staffordshire County Council
Local Aggregate Assessment 2023 (2022 Survey Data)**

Minerals Local Plan for Staffordshire 2015 to 2030



Local Aggregate Assessment 2023
(2022 survey data)

Staffordshire County Council
Local Aggregate Assessment – 2022 Survey

Executive Summary

		Sand and gravel	Crushed rock
Production	2022 sales	5.316 million tonnes ↓	Not available
	2021 figure for comparison	5.429 million tonnes	Not available
	3-year average sales (as of 1 Jan 2022)	5.198 million tonnes ↑	Not available
	2021 figure for comparison	5.105 million tonnes	Not available
	10-year average sales (as of 1 Jan 2022)	4.722 million tonnes ↑	Not available
	2021 figure for comparison	4.531 million tonnes	Not available
	Number of operational quarries (2022)	15 ↔	1
	2021 figure for comparison	15	1

Key: ↑: Up from previous year; ↓: Down from previous year; ↔: Same as previous year.

Appendix 3 – Extract of East of England Aggregates
Working Party Annual Report 2022

EEAWP

EAST OF ENGLAND

AGGREGATES WORKING PARTY



ANNUAL REPORT: 2022

Bedford, Central Bedfordshire and Luton • Cambridgeshire and Peterborough
Essex, Southend-on-Sea and Thurrock • Hertfordshire • Norfolk • Suffolk

Local Aggregate Assessments

- 4.45 With the publication of the NPPF and MASS Guidance in 2012²⁹, DCLG (as it was then) introduced the requirement for mineral planning authorities, either individually or with other mineral planning authorities, to produce an annual local aggregates assessment. The Planning Practice Guidance now provides that the LAA should contain three elements:
- a forecast of the demand for aggregates based on both the rolling average of 10-years' sales data and other relevant local information;
 - an analysis of all aggregate supply options, as indicated by landbanks, mineral plan allocations and capacity data e.g. marine licences for marine aggregate extraction, recycled aggregates and the potential throughputs from wharves. This analysis should be informed by planning information, the aggregate industry and other bodies such as local enterprise partnerships; and
 - an assessment of the balance between demand and supply, and the economic and environmental opportunities and constraints that might influence the situation. It should conclude if there is a shortage or a surplus of supply and, if the former, how this is being addressed.
- 4.46 LAAs must also consider other relevant local information in addition to the 10-year rolling supply, which seeks to look ahead at possible future demand, rather than rely solely on past sales. Such information may include, for example, levels of planned construction and housebuilding in their area and throughout the country. Mineral planning authorities should also look at average sales over the last three years in particular to identify the general trend of demand as part of the consideration of whether it might be appropriate to increase supply. This baseline assessment, together with an assessment of all supply options (including marine dredged, secondary and recycled sources), should help mineral planning authorities plan for a steady and adequate supply of aggregates.
- 4.47 In respect of the 10-year period covering the years 2013-2022, three draft LAAs have been submitted to EEAWP for consideration (by Greater Essex, Cambridgeshire and Peterborough and Hertfordshire) and comments on these have been invited from EEAWP members.
- 4.48 Table 10 summarises the position in respect of the region's LAAs covering the period 2013-2022 and shows the calculation method for the LAA rate (or 'LAA figure') for each of crushed rock and sand and gravel. Note that whilst the NPPF and PPG do not specifically use the term 'LAA rate', it is a term which is widely used in LAAs to describe the forecasted annual rate of future demand. Equivalent terminology may also describe this as the '*annual provision rate*' or '*aggregate provision rate*'. The PPG provides that: 'Aggregate landbanks should be recalculated each year. The length of the aggregate landbank is the sum in tonnes of all permitted reserves for which valid planning permissions are extant, divided by the annual rate of future demand based on the latest annual Local Aggregate Assessment.'

²⁹ Note that the MASS Guidance was withdrawn in March 2014 and replaced by the Planning Practice Guidance.

Table 10: Local Aggregate Assessments

Mineral Planning Authority	LAA Figure for Sand and Gravel	LAA Figure for Crushed Rock	Calculation Method
Bedford, Central Bedfordshire and Luton	1.453mtpa	C	10 year sales average
Cambridgeshire and Peterborough	2.6mtpa	C	MLP policy rates
Essex, Southend-on-Sea and Thurrock	4.45mtpa	n/a	MLP policy rates (sub-national apportionment figure)
Hertfordshire	1.16mtpa	n/a	10 year sales average (since 2021)
Norfolk	1.554mtpa	C	10 year sales average plus 10% ³⁰
Suffolk	1.077mtpa	n/a	10 year sales average

Summary

- 4.49 Sales for both sand and gravel and crushed rock are below the levels of provision anticipated within the sub-national apportionment figures (11.29mt (actual 2022 sand and gravel sales) versus 14.75 mtpa (Guideline figure) and 0.17mt (actual 2022 crushed rock sales) versus 0.5 mtpa (Guideline figure)). It remains important to consider the context of continued sales against the backdrop of a general downward trend in reserves. The Mineral Products Association, in its 10th Annual Mineral Planning Survey Report (AMPS 2022), has revealed that as of the end of 2021, the rolling 10-year average for replenishment of sand and gravel reserves was 63% whilst, for crushed rock reserves, the replenishment rate was just 52%. This position is clearly unsustainable in the long run. Caution should, therefore, continue to be exercised when assessing the position against 10 year sales figures and individual mineral planning authorities are encouraged to give careful consideration to their annual aggregate provision rates when preparing their Local Aggregate Assessments and particularly when reviewing their development plans.
- 4.50 At the end of 2022, reserves of land-won sand and gravel in the East of England stood at 116.304mt. Applying the NPPF methodology based on a rolling average of 10 year sales indicates a landbank of

³⁰ NB Assumes a 10 year sales average of 1.413mt. This is at slight variance with the 10 year sales average reported in this document owing to a disparity in reported figures for 2019 where this document relies on BGS data whilst Norfolk's LAA uses locally obtained figures.

Appendix 4 – Extract of East Midlands Aggregates
Working Party Annual Report 2022



North
Northamptonshire
Council

East Midlands Aggregates Working Party

Annual Report 2022

[Data from January to
December 2022]

Published December 2023

Correct as of this date: 22 December 2023

Chairman	EMAWP Secretary
<p data-bbox="236 465 667 696">Stephen Pointer Team Manager, Planning Policy Nottinghamshire County Council County Hall, West Bridgford NG2 7QP Tel: 0115 993 9388 stephen.pointer@nottscc.gov.uk</p>	<p data-bbox="770 465 1412 763">Mark Chant Head of Planning Services (Minerals and Waste) Laura Burton Principal Planner North Northamptonshire Council One Angel Square, Angel Street, Northampton NN1 1ED Mark.Chant@northnorthants.gov.uk Laura.Burton@northnorthants.gov.uk</p>

The statistics and statements contained in this report are based on information from a large number of third party sources and are compiled to an appropriate level of accuracy and verification. Readers should use corroborative data before making major decisions based on this information. Published by North Northamptonshire Council on behalf of the East Midlands Aggregates Working Party.

Local Aggregate Assessments

- 10.1 LAAs are fundamental to the Annual Report as they integrate relevant aggregates data at the local level and provide the foundations for informing whether the East Midlands is meeting its aggregates requirements. All the MPAs have submitted draft LAAs for 2022.
- 10.2 The sand and gravel APR is 11% higher than the current 3 year average, this is due to sales falling in 2020 as a result of the Covid Pandemic and remaining depressed due to the economic state and reducing the average sales. The APR is very similar to the current 10 year average. The 2022 sales were 10.7% lower than the APR but the 9.8 year land bank leaves room in the event demand increases.
- 10.3 The crushed rock Annual Provision Rate is higher than the 3-year average sales by 2.5% and 4.3% higher than the 10 year average. This reflects the recent increase in sales. Although the 40.7 year landbank provides a substantial cushion.
- 10.4 A number of authorities have pending applications which will when approved assist in increasing both the crushed rock and sand and gravel landbanks.
- 10.5 The LAA's have been discussed at EMAWP and only a small number of issues and concerns were raised.
- Those that have landbanks that extend beyond 2042 is only theoretical, as sites would need end dates to be extended.
 - Should future LAA's focus more on the issues of 2042?
 - Sites being overworked are unbalancing figures, consideration will be needed when finalising Local Plan figures.

Table 11 2022 Local Aggregate Assessments in EMAWP Region

Mineral Planning Authority	Complete (Yes or No)	LAA Figure - Sand and Gravel	LAA Figure - Crushed Rock	Calculation Method
Derbyshire (combined with Peak District NP)	Yes	0.97Mt	9.27Mt	10 year sales average S&G - 3 year sales average + 10% of PDNP requirement CR
Peak District National Park (combined with Derbyshire)	Yes	N/A	3.02Mt	3 year average minus 10%
Leicestershire	Yes	1.1Mt	12.99Mt	10 year sales average
Lincolnshire	Yes	2.325Mt	1.355Mt	10 year sales average S&G - 3 year sales average CR
Northamptonshire (West and North)	Yes	0.5Mt	0.28Mt	Adopted MWLP rate
Nottinghamshire	Yes	1.37Mt Sand and Gravel 0.31Mt Sherwood Sandstone	0	10 year sales average
Rutland	Yes	0	0.28Mt	10 year sales average

**Appendix 5 – Extract of North East England Aggregates
Working Party Annual Report 2022**

North East England Aggregates Working Party

Annual Report 2022

Published December 2023

This report has been published by Northumberland County Council on behalf of the North East England Aggregates Working Party.

Correct as of this date: 15 December 2023.

North East England AWP Chair:

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Table 10 2022 Local Aggregate Assessments in North East England

Mineral Planning Authority	Complete (Yes or No)	LAA Annual Provision Rate - Sand and Gravel (tonnes)	LAA Annual Provision Rate - Crushed Rock (tonnes)	Calculation Method
Durham	Yes	548,000	3,180,000	Three year sales average (2019, 2021 and 2022)
Northumberland County and Northumberland National Park	Yes	346,000	1,920,000	Sand and gravel: Ten-year average Crushed rock: Three-year sales average (2019, 2021 and 2022)
Darlington, Hartlepool, Middlesbrough, Redcar and Cleveland, and Stockton on Tees	No (Figures from 2021 LAA)	175,000	187,500	Apportionment of the national and sub-national guidelines for 2006 to 2020
Gateshead, Newcastle, North Tyneside, South Tyneside, and Sunderland	Yes	228,000	418,000	Ten-year sales average (2013 to 2022)

Summary

Over the ten-year period from 2013 to 2022 there has been a general upward trend in sales of primary aggregates. The most significant increases took place up to 2018 with sales levelling out in more recent years. This reflects increasing levels of house building following economic downturn that affected sales from 2007 and a number of ongoing infrastructure projects of note. This level of house building is planned to continue in the coming years and infrastructure projects have been identified that will place a similar demand for aggregates to that experienced in previous years. A drop in sales was observed in 2020 and this was considered to be as a result of temporary restrictions put in place to control the coronavirus pandemic. Provision for aggregate minerals in North East England therefore should reflect these levels of activity.

For North East England as a whole the landbanks of crushed rock and sand and gravel are above the minimum landbanks of 10 years and 7 years respectively, based on the annual provision rates in the Local Aggregates Assessments. However, there is likely to be a shortfall in sand and gravel provision in future years as landbanks will fall below the minimum indicators in the short to medium-term based on current sales levels if further provision is not made. Crushed rock landbanks at the regional level are well above the landbank indicator, but they could fall below the minimum levels for some mineral planning authorities. The implications of the end dates of some existing planning permissions and

**Appendix 6 – Extract of South East England
Aggregates Working Party Annual Report 2022
[Published December 2023]**

South East England Aggregates Working Party (SEEAWP)

Annual Report 2022



SEEAWP Chair: **Tony Cook**

SEEAWP Secretary: **Richard Read BA, Dip TP, MRTPI**

Published December 2023

Local Aggregate Assessments in the SEEAWP area (Table 10)

All the South East MPAs apart from Slough, have submitted draft LAAs 2022 that inform the aggregate planning position at local (MPA) level. Some MPAs have landbanks below the NPPF requirement (Sand and gravel - 7 years; crushed rock -10 years).

Buckinghamshire has a sand and gravel landbank of 5 years. However, the mineral plan has outstanding sand and gravel site allocations that extend the land bank by 6 years.

East Sussex, Brighton and Hove and South Downs have a very limited land bank but there are limited land won aggregate resources.

The Isle of Wight has also a land bank of 5 years. Its island status may limit realisation of potential resources into reserves. A local plan is being prepared. The draft LAA indicates no wharf capacity constraints for handling marine dredged aggregate or crushed rock imports.

Medway has limited reserves of sand and gravel and a 5 year land bank. There are resource limitations but along with Kent it has significant wharf and rail depot capacity.

Milton Keynes has a very limited land bank but the mineral plan includes several allocations.

Oxfordshire has a crushed rock land bank of 7 years. There is an outstanding application that could provide a further 3 years

Surrey has a sand and gravel land bank of 7 years, but it is heavily skewed to soft sand. The mineral plan and undetermined applications if realised should address this imbalance.

West Sussex has only a land bank of 4 years and comprised of soft sand. Apart from incidental recovery of sharp sand and gravel, it appears there is limited potential for further reserves.

Overall there are some aggregate supply issues at the local level. Some MPAs that have land banks that do not meet NPPF requirement do have important mitigations by way of outstanding site allocations and/or applications yet to be determined. There are some, however, that are reliant on imports, MDA and to a degree S/RA. Generally there appears to be no infrastructure constraints – setting aside possible wharf issues in Hampshire – to deliver aggregates. However, this does not necessarily address a need for land won sand and gravel in areas that cannot provide this aggregate.

Table 10 Local Aggregate Assessments in the South East 2022

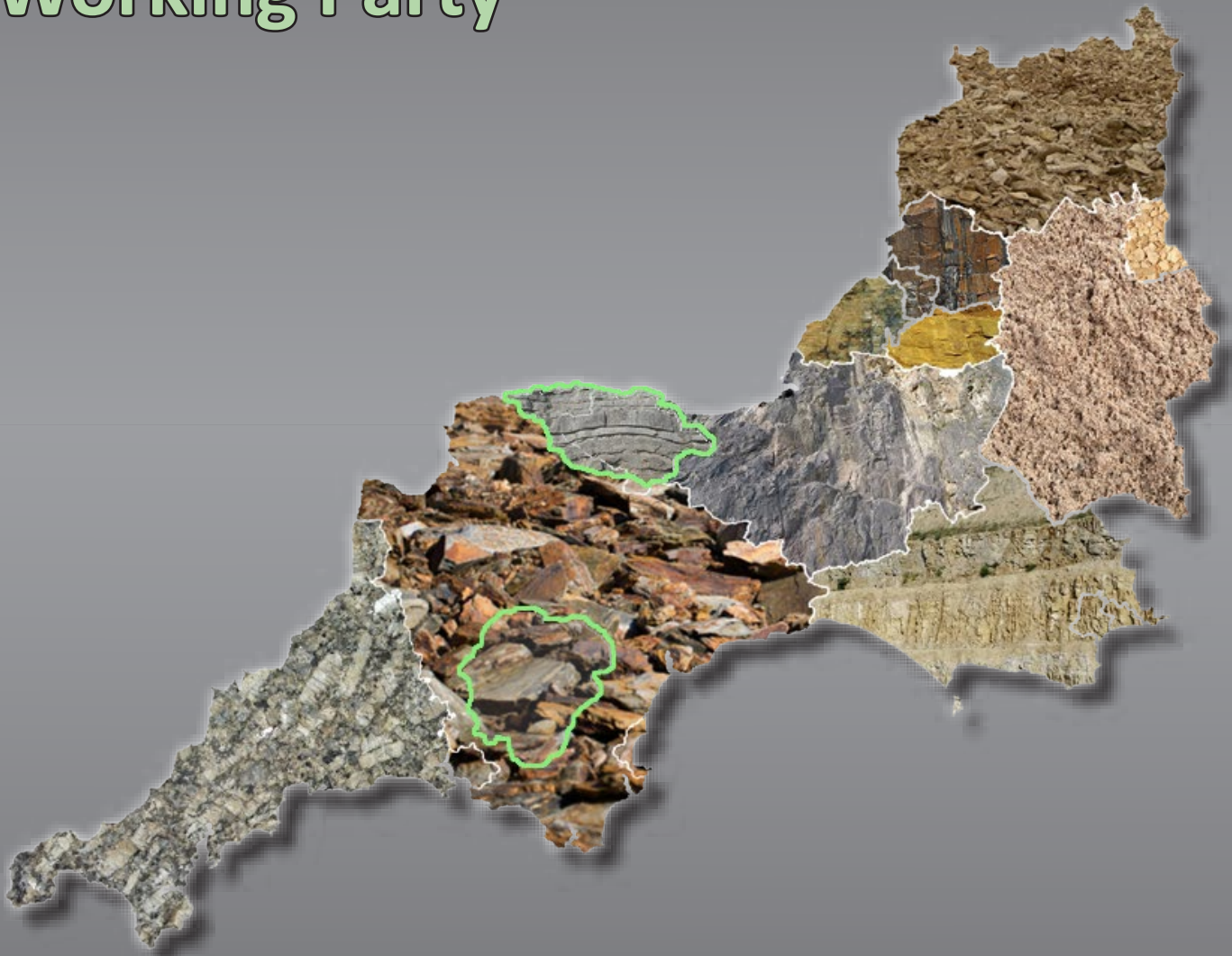
Mineral Planning Authority	APR (Thousand tonnes/pa)		Landbank (Years)		APR Methodology
	S & G	CR	S & G	CR	
Buckinghamshire	1,070	n/a	5	n/a	3-yr. av. sales
No CR reserves, wharves or active rail depots. Potential reserves of 5.9 Mt would address low landbank. Relatively small amounts of recycled aggregate sales which represent less than 10% of total aggregate sales					
C & E Berkshire	591	n/a	9	n/a	APR less than 10 year average sales and based on a variety of growth factors for forecasting.
APR below 10 av. sales of 705,000 which would give landbank of 8 years. Reserves: Proposed allocations/criteria policy in emerging (now adopted) plan. No SS reserves. Capacity: No rail depot – dependent on neighbouring MPAs (see West Berkshire below) - no capacity issues reported. S/RA capacity headroom est. about 25%.					
East Sussex, Brighton & Hove	71	n/a	<1	n/a	3-yr. av. sales divided in half
Specific geographic circumstances for calculating APR. Reserves very depleted. Mineral plan to determine if further potential reserves can be allocated.. SS reserves, but no recent sales. Capacity: MDA sales above 3-yr. av. but sufficient capacity at the wharves and rail depots. S/RA capacity data limited but historic information indicates adequate headroom. Review of Waste and Minerals Local Plan Revised Policies to resolve future aggregate supply issues.					
Hampshire	900	n/a	12	n/a	Combination of 10-year sales data and growth factors including MPA forecast
APR slightly below 10 yr. average sales. Reserves: SSG landbank above NPPF requirement but SS landbank of 5 years, but applications and review of mineral plan pending. Capacity: data for MDA/imported aggregates limited with possible issue for wharves. Large capacity headroom for S/RA					
Isle of Wight	100	n/a	5	n/a	Higher than 10-yr. av. sales
Reserves below NPPF requirement. Some limited SS and CR sales/reserves (confidential) MDA important aggregate source but no constraints on wharf and S/RA capacity					
Kent	652	1,047	12	14	APRs based on 10-yr. av. sales
Both SS/SSG landbanks above minimum requirement. LAA reports SSG in steep decline with no realistic potential for this trend to be reversed. Adequate capacity at wharves and rail depots but CR imports have been at a record high. Alternative development pressures at some of the wharves. Capacity at S/RA sites adequate subject to data limitations.					
Medway	72	n/a	5	n/a	APR above 10 year av. sales
Only two quarries (one currently operating) with limited life so reserves limited although potential for further sites and emerging local plan proposing areas of search. No SS resources. Rising trend in MDA sales but wharf capacity for MDA and imported aggregates. S/RA sales declining but significant capacity.					

Milton Keynes	170	n/a	1	n/a	Derived from MLP – higher than 10 -year average sales
Landbank below NPPF requirement but mineral plan allocations (4 sites). No SS resources. Some rail depot capacity margin. Recycled aggregate sales modest (little CDE generated) generous capacity margin					
Oxfordshire	1,229	914	11	7	APR (S&G) based on Core Strategy and retained to account for sales/projected growth but below 10 yr-av. sales, which would increase land bank of 6.5 years. APR (CR) 10-year average
Rising sales trend (two major rail projects) and declining reserves. CR below NPPF landbank requirement, but undetermined application for 3 Mt. Although rail depots data confidential sales appear buoyant and capacity has increased with new investment. Recycled aggregate sales declined but capacity increased. Oxfordshire has been heavily affected by HS2 and APRs to be reviewed after 'normal' sales patterns re-emerge.					
Slough					
Slough BC does not engage with SEEAWP and has not prepared LAAs. However, the Borough has a major aggregates rail depot and some S/RA sites and sales data on these included in the Annual Report. No data on capacity.					
Surrey	800	see notes	10	see notes	Above av. sales to factor in demand pressures
Landbank meet NPPF requirements with similar landbanks of about 10 years for both SS and SSG. Allocations if permitted would address t would increase landbank further. Long term prospects for local land won aggregate supply uncertain. A plan review is underway. CR reserve but site not operational. Capacity: Rail depot sales limited as only one site – imports from depots in adjacent MPAs – see West Sussex below. S/RA sales increased in 2021 although declining trend – ample capacity.					
West Berkshire	233	n/a	11	n/a	Same as 2018 rate and well above 10-yr. av. sales
Adequate landbank but concentrated on one site. No SS reserves, although a site might emerge in the plan under preparation. CR sales (imports) appear to be increasing though no reported capacity issues. Capacity well above sales for recycled aggregate facilities (no secondary aggregate facilities).					
West Sussex	466	n/a	4	n/a	APR above 10 year av, although close to 2022 sales levels
Reserves: A S&G landbank of 4 years, comprising a number of soft sand sites, and one sharp sand and gravel site. Sales of sharp sand and gravel include incidentally extracted sales from soft sand quarries in the Plan area. There are three allocations for soft sand extraction and none for sharp sand and gravel extraction in the Mineral Plan. The Plan allows for additional sites if the need is demonstrated. Capacity: sufficient capacity headroom estimated for both wharves, depots and S/RA facilities Comment: Low landbanks noted and options to address these needs to be considered by the MPA.					

**Appendix 7 – Extract of South West Aggregates
Working Party Annual Report 2022**

SWAWP

South West Aggregates Working Party



Annual Report: 2022

Bath and North East Somerset • Bristol • Bournemouth, Christchurch & Poole
Cornwall • Dartmoor NP • Devon • Dorset • Exmoor NP
Gloucestershire • Isles of Scilly • North Somerset • Plymouth • Somerset
South Gloucestershire • Swindon • Torbay • Wiltshire

South West Aggregates Working Party

Annual Monitoring Report

2022 Data

Enquiries concerning the purchase of this or other SWAWP publications referred to in this report should be addressed to the Secretary of the Working Party.



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PROJECT South West Aggregates Working Party

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DATA CORRECT AS OF DECEMBER 2023

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Local Aggregate Assessments

- 4.35 With the publication of the NPPF and MASS Guidance in 2012, DCLG (as it was then) introduced the requirement for mineral planning authorities, either individually or with other mineral planning authorities, to produce an annual Local Aggregates Assessment (LAA). The Planning Practice Guidance now provides that an LAA should contain three elements:
- a forecast of the demand for aggregates based on both the rolling average of 10-years' sales data and other relevant local information;
 - an analysis of all aggregate supply options, as indicated by landbanks, mineral plan allocations and capacity data e.g. marine licences for marine aggregate extraction, recycled aggregates and the potential throughputs from wharves. This analysis should be informed by planning information, the aggregate industry and other bodies such as local enterprise partnerships; and
 - an assessment of the balance between demand and supply, and the economic and environmental opportunities and constraints that might influence the situation. It should conclude if there is a shortage or a surplus of supply and, if the former, how this is being addressed.
- 4.36 LAAs must also consider other relevant local information in addition to the 10-year rolling supply, which seeks to look ahead at possible future demand, rather than rely solely on past sales. Such information may include, for example, levels of planned construction and housebuilding in their area and throughout the country. Mineral planning authorities should also look at average sales over the last three years, in particular to identify the general trend of demand as part of the consideration of whether it might be appropriate to increase supply. This baseline assessment, together with an assessment of all supply options (including marine dredged, secondary and recycled sources), should help mineral planning authorities plan for a steady and adequate supply of aggregates.
- 4.37 In respect of the 10-year period covering the years 2013-2022, six draft LAAs have been submitted to the SWAWP for consideration (by Cornwall, Devon, Dorset, Somerset, the West of England and Wiltshire) and comments on these have been or are currently in the process of being made by the SWAWP with input from SWAWP members.
- 4.38 Table 10 summarises the position in respect of the region's LAAs covering the period 2013-2022 and shows the calculation method for the LAA rate (or 'LAA figure') for each of crushed rock and sand and gravel. Note that whilst the NPPF and PPG do not specifically use the term 'LAA rate', it is a term which is widely used in LAAs to describe the forecasted annual rate of future demand. Equivalent terminology may also describe this as the '*annual provision rate*' or '*aggregate provision rate*'. The PPG provides that: 'Aggregate landbanks should be recalculated each year. The length of the aggregate landbank is the sum in tonnes of all permitted reserves for which valid planning permissions are extant, divided by the annual rate

of future demand based on the latest annual Local Aggregate Assessment.’ Each mineral planning authority should, therefore, determine its own LAA rate each year based on a rolling average of 10 years’ sales data and other relevant local information. This rate should be reported in the individual LAA prepared by that mineral planning authority.

Table 10: Local Aggregate Assessments

Mineral Planning Authority	LAA Figure for Sand and Gravel	LAA Figure for Crushed Rock	Calculation Method
Cornwall inc Isles of Scilly	n/a	1.41mtpa	10 year sales average
Devon inc Dartmoor NP, Torbay Borough, part Exmoor NP and Plymouth City	0.52mtpa	2.6mtpa	10 year sales average
Dorset and BCP	1.36mtpa ¹⁴	0.21mtpa	10 year sales average
Gloucestershire	0.64mtpa	1.43mtpa	10 year sales average
Somerset inc part Exmoor NP	n/a	13.4mtpa	Sub-regional apportionment
West of England inc BANES, Bristol City, North Somerset and South Gloucestershire	n/a	3.89mtpa	10 year sales average
Wiltshire and Swindon	0.53mtpa	n/a	10 year sales average

Summary

- 4.39 It is notable that, particularly in the case of crushed rock, annual sales since 2014 have been in the region of the amount provided for within the (now outdated) National and Sub-National Guidelines (which made provision for 25.75mt). Sales of crushed rock in the South West in 2022 were 24.22mt representing a decrease from the 26.77mt recorded in 2021 but maintaining the fairly steady trajectory of sales recorded since 2015. Based on information contained within the AMS 2019 relating to imports and exports of aggregates between regions, it is evident that the South West is a net exporter of crushed rock, having high sales but low consumption.
- 4.40 Permitted reserves of crushed rock have fallen steadily since 2013 when they stood at a high of 897.02mt. 2022 has seen a significant drop to an overall South West reserves' figure of 755.25mt down from the 2021 figure of 787.57mt with all mineral planning authorities in the

¹⁴ This is the figure used in Dorset's draft LAA for 2022 which is at minor variance from the 10 year average reported in this document as this report is required to use the BGS figures for 2019.

Appendix 8 – Extract of Yorkshire and the Humber
Aggregates Working Party Annual Report 2023 [2022
data]

Yorkshire and the Humber Aggregates Working Party

Annual Report 2023 [2022 data]

Published December 2023

Yorkshire and the Humber AWP – AMR 2023 [2022 data]

Correct as of this date: 19/12/2023

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Local Aggregate Assessments

Each Mineral Planning Authority is required to produce an annual Local Aggregate Assessment which provides:

- An analysis of local aggregate supply;
- A statement on forecasted demand for aggregates; and
- An assessment of the balance between demand and supply.

Paragraphs 061-071 relating to [Local Aggregate Assessments](#) in national Planning Practice Guidance, and the '[Practice Guidance on the Production and Use of Local Aggregate Assessments](#)' produced by the Planning Officers' Society and the Mineral Products Association, provide advice on how this should be done.

Table 9 2022 Local Aggregate Assessments in Yorkshire and the Humber

Mineral Planning Authority	Year 2022 Complete (Yes or No)	LAA Figure		Calculation Method
		Sand and Gravel	Crushed Rock	
North Yorkshire Council, Yorkshire Dales National Park Authority, North York Moors National Park Authority, York City Council	Yes (2022 data)	Requirement to 2030 22mt	Requirement to 2030 33.8mt	Estimated requirement of 2.44mtpa for S&G and 3.75mtpa for CR
Doncaster and Rotherham LAA	Yes (2022 data)			
Humber sub-region (East Riding of Yorkshire, North Lincolnshire, North East Lincolnshire, and Hull City Councils)	Draft update May 2023	0.94mt	0.78mt	For the purposes of assessing the future aggregate requirements of the Humber area, the aggregates apportionments for the 'north bank' have been aggregated with the apportionments for the 'south bank' to form the following combined Humber apportionments: <ul style="list-style-type: none"> • Crushed Rock - 0.78 million tonnes per annum • Sand and Gravel - 0.94 million tonnes per annum