

Divisions Affected – All

CABINET

15th October 2024

LOCAL AGGREGATES ASSESSMENT

Report by Director of Economy and Place

RECOMMENDATION

1. **The Cabinet is RECOMMENDED to**
 - a. Approve the Local Aggregate Assessment presented in Annex 2.
 - b. Authorise the Director of Economy and Place in consultation with the Cabinet Member for Climate Change, Environment and Future Generations to make any revisions and publish the Oxfordshire Local Aggregate Assessment for the calendar year 2023 on the Council website.

Executive Summary

2. Under the National Planning Policy Framework, December 2023 (NPPF), Mineral Planning Authorities should prepare an annual Local Aggregate Assessment (LAA). The NPPF states that the LAA should ‘forecast future demand, based on a rolling average of 10 years’ sales data and other relevant information, and an assessment of all supply options.’
3. The annual Local Aggregates Assessment (LAA) sets the level of mineral provision for the County Council as the Mineral Planning Authority, to ensure an appropriate supply for Sand and Gravel and Crushed Rock. This provision level, known as the Aggregates Provision Rate (APR) is based on an assessment between the supply and demand of aggregates in Oxfordshire and forecast demand.
4. The data is gathered through annual Aggregates Surveys of mineral operators within Oxfordshire. This survey was undertaken jointly by Oxfordshire County Council and the British Geological Survey (BGS) on behalf of the Ministry of Housing, Communities and Local Government (MHCLG).
5. The LAA provides the most up to date information and evidence to inform mineral planning within Oxfordshire. The latest LAA (Annex 2) covers the calendar year 2023.

6. By supporting the recommendation to adopt the latest LAA, the County Council is endorsing the provision levels set out in paragraph 39 of this report for use as evidence for the provision for mineral working in the Oxfordshire Minerals and Waste Local Plan, and for calculating the Oxfordshire landbank as at the end of 2023.

Summary of Main Findings

7. Table 1 provides a summary of the main findings in relation to sales, reserves and landbank of Primary Won Aggregates, i.e minerals quarried as set out in the latest LAA. The arrows indicate an increase or decrease from the previous year's LAA findings. For a full summary of Key Data including average 10-year sales and 3-year sales, please see Annex 1 or for full historic records see the Appendix of the LAA (Annex 2)

	LAA (for calendar year 2023) Mt = million tonnes	
Sharp Sand and Gravel Sales	0.877mt	↓
Sharp Sand and Gravel Reserve	7.693mt	↓
Sharp Sand and Gravel Landbank ¹ (7 years or more)	7.8years	✓
Soft Sand Sales	0.203mt	↓
Soft Sand Reserve	3.288 mt	↓
Soft Sand Landbank (7 years or more)	14 years	✓
Crushed Rock Sales	1.002mt	↓
Crushed Rock Reserve	4.744mt	↓
Crushed Rock Landbank (10 years or more)	4.9 years	✗

Table 1: Summary of mineral findings 2023

8. Detailed assessments of supply and demand were carried out. These assessments also included evidence of sales figures, economic forecasts, infrastructure requirements and population and housing. Also considered were Covid and inflation alongside the details of the mineral imports and exports figures from MHCLG in 2019. The more recent details of imports and exports being produced by BGS for 2023 data, as part of the MHCLG survey, have not been released at this time. They will be discussed in the future LAAs.
9. Following these considerations, it is proposed that the Aggregates Provision Rate (APR) is kept the same as last year's rate for Sharp Sand and Gravel of 0.986 million tonnes per annum (mtpa), however it is intended to reduce the Soft Sand APR from 0.243 to 0.235mtpa. It is also intended to increase the

¹ The landbank is calculated through taking the mineral reserve and dividing by the LAA provision rate.

Crushed Rock APR from 0.914 to 0.964mtpa. Both these APRs are based on the 10 year average, alongside consideration of all other relevant local information and supply options. Therefore, the APRs for this year’s LAA are:

- **Sharp Sand and Gravel – 0.986mtpa**
- **Soft Sand – 0.235mtpa**
- **Crushed Rock – 0.964mtpa**
- **Recycled and Secondary Aggregates - 0.926mtpa**

10. The Core Strategy, Policy M2, sets out the amount of minerals to be provided over the Plan period. This was based on the LAA2014 Aggregates Provision Rates. Table 2 sets out the remaining mineral requirements to meet the Core Strategy Requirements.

	Core Strategy Requirements identified through LAA
Sharp Sand and Gravel	2.650mt
Soft Sand	0
Crushed Rock	0

Table 2: Core Strategy Mineral Requirements as at the end 2023 (mt- Million tonnes)

11. As the Minerals and Waste Planning Authority, the County Council has a duty under the NPPF to “plan for and maintain a steady and adequate supply of minerals”. This is measured through the LAAs and our landbank provision.
12. Our current landbanks for Soft Sand and Sharp Sand and Gravel are above the 7-year requirement in the NPPF, however upon completion of the latest LAA, the Crushed Rock landbank remains below the 10 years required. This is the fifth consecutive year it has fallen below the required level. A trigger was reached for a policy review of the Oxfordshire Minerals and Waste Core Strategy (2017) in 2019, particularly Policy M2 for Crushed Rock, and this will be addressed through the new Minerals and Waste Local Plan.

Local Aggregate Assessment

Sales

Primary won aggregate

13. Annex 1 sets out the sales figures for Sharp Sand and Gravel, Soft Sand and Crushed Rock, alongside the 10-year and 3-year sales averages for each mineral type for 2023.
14. In 2023, all three land won minerals saw a decrease in their sales compared with 2022. For Sharp Sand and Gravel it was a 9.8% decrease, Soft Sand 11% and for Crushed Rock 12.6%.
15. However, the 10 year sales averages increased for all mineral types and the 3-year sales averages increased for Sharp Sand and Gravel and Crushed Rock. However, for Soft Sand the 3 year sales average decreased.

Recycled and Secondary Aggregates

16. In 2022 recorded sales in Recycled and Secondary Aggregate were 0.443mt. Survey response was poor therefore this was calculated from data within the Environment Agencies Waste Data Interrogators.

Rail Depots

17. In 2023, there were no survey returns from operators on sales from Rail Depots. However, due to increased rail depot capacity, it suggests that sales from these depots have significantly increased.

Supply

18. Oxfordshire is a mineral rich county which currently has 20 quarries with 11 Sharp Sand and Gravel permissions, 8 Soft Sand permissions and 12 Crushed Rock permissions. Some sites produce a variety of mineral types within them. We are one of the major mineral producers in the Region, even Nationally, and we have more Crushed Rock producing sites than the rest of the South East combined.

Sand and Gravel

19. At the end of 2023, Oxfordshire had 11 Sand and Gravel quarries, two currently inactive and one in suspension. One planning permission was granted in 2023 for 128,000 tonnes of Sharp Sand and Gravel at Oday Hill, Sutton Wick and there were four Sharp Sand and Gravel planning applications outstanding.

20. Total permitted reserves of Sharp Sand and Gravel in Oxfordshire at the end of 2023 were 7.693mt.

Soft Sand

21. In Oxfordshire, at the end of 2023, there were eight sites with planning permission for Soft Sand extraction, with two currently inactive. No planning permissions for Soft Sand were permitted in 2023.
22. Total permitted reserves for Soft Sand in Oxfordshire at the end of 2023 were 3.288mt.

Crushed Rock

23. At the end of 2023, there were twelve sites with planning permission for Crushed Rock extraction. There were no planning permissions for Crushed Rock permitted in 2023. There were four planning applications for Crushed Rock outstanding at the end of 2023.
24. Total permitted reserves for Crushed Rock in Oxfordshire at the end of 2023 were 4.744mt.

Recycled and secondary material sites

25. At the end of 2023, permitted capacity taken from planning decisions, application statements and previous survey finding was 1.523 million tonnes.

Rail Depots

26. Oxfordshire has four permitted rail depots, three of which are operational. Due to a number of recent planning decisions, Oxfordshire has increased its rail depot capacity to over 3.5 million tonnes.

Imports and Exports

27. Every county in the UK has to import aggregates because none possess the geology necessary to produce all the types of aggregate required. All sales which reflect supply and demand are tracked in the four (six) yearly national aggregate surveys.
28. The most recently available, the 2019 Aggregates Minerals Survey for England and Wales (AM2019), was undertaken by the BGS under a contract with the MHCLG. The AM2019 set out aggregate movements at a sub-regional level. This was discussed within the LAA2020 and it highlighted that Oxfordshire is a net exporter of all Land Won Sand and Gravel and Crushed Rock. Once we receive the AM2023 report from the BGS, Oxfordshire's imports and exports will be reviewed. This will be undertaken in the next LAA.

Demand

29. The NPPF requires that the level of future provision within the LAA should be based, in part, on the rolling average of 10 years' sales figures. It also requires "other relevant local information" to be taken into account.
30. Therefore, detailed assessments of supply and demand were carried out. These assessments included evidence of sales figures, economic forecasts, infrastructure requirements (such as HS2), and population and housing. Also considered were the impacts of Covid, and inflation and the election and formation of a new Government alongside the details of the mineral imports and exports figures from MHCLG in 2019.
31. The evidence available suggests that economic forecasts, major infrastructure projects/key development and population growth and housing are all expecting growth over the plan period and that demand would continue for the foreseeable future. The impact of inflation and the new political agenda, along with infrastructure projects will continue to be explored in future LAAs.

Aggregate Provision Rates

32. Following all of these considerations, it is proposed that the Aggregate Provision Rates (APR) is kept the same as last year's LAA for Sharp Sand and Gravel, and Recycled and Secondary Aggregate. However, it is intended to decrease the Soft Sand APR and increase the Crushed Rock APR to the 10-year averages. Therefore, the APRs for this year's LAA are:
 - **Sharp Sand and Gravel – 0.986mtpa**
 - **Soft Sand – 0.235mtpa**
 - **Crushed Rock – 0.964mtpa**
 - **Recycled and Secondary Aggregates - 0.926mtpa**

Landbank

33. Using the Aggregate Provision Rate above and the reserves available, the landbanks as at the end of 2023 are:
 - **Sharp Sand and Gravel – 7.8 years**
 - **Soft Sand – 14 years**
 - **Crushed Rock – 4.9 years**

Mineral Requirements

Core Strategy

34. The Core Strategy sets out requirements for Sharp Sand and Gravel, Soft Sand and Crushed Rock for the Plan Period based upon the LAA2014 provision rates.
35. Taking into account the sales since 2014 and the minerals available to be worked over the Plan Period, the remaining required minerals to meet the Core Strategy requirements are set out below:

	Core Strategy Requirements (2014-2031) (Mt – Million tonnes)	Remaining Core Strategy Requirements identified through LAA
Sharp Sand and Gravel	18.27mt	2.649mt
Soft Sand	3.40mt	0
Crushed Rock	10.51mt	0

Table 4: Core Strategy Requirements

New Minerals and Waste Local Plan

36. However, identifying the 2.649 million tonnes of Sharp Sand and Gravel, will not address the issue of the Crushed Rock landbank being below at least 10 years, as required by the NPPF. Therefore, to address this along with other policy changes required, in December 2022 it was agreed to commence with a new Minerals and Waste Plan for Oxfordshire. This new Plan will consider mineral requirements for all aggregates over the new Plan period during its preparation.
37. Mineral requirements within the adopted Core Strategy will be replaced with the mineral requirements as set out within the new Minerals and Waste Plan upon adoption. The new Minerals and Waste Plan has been delayed because of the uncertainty over the future plan making process following the Government consultation on the subject.

Conclusion

38. The purpose of an annual LAA is to review the latest information available, in order to forecast future demand as well as analysing all aggregate supply options and assessing the balance between supply and demand.
39. To ensure that supply continues to meet demand, the Aggregates Provision Rate (APR) included within the LAA are:
- **Sand and Gravel – 0.986 mtpa**
 - **Soft Sand – 0.235mtpa**
 - **Crushed Rock – 0.964mtpa**
 - **Recycled and Secondary Aggregates- 0.926mtpa**
40. Using these APRs and the Oxfordshire reserves at the end of 2023, the landbanks can be calculated as:

- **Sand and Gravel – 7.8 years**
- **Soft Sand – 14 years**
- **Crushed Rock – 4.9 years**

41. To meet the Core Strategy requirements, we will need to identify Sharp Sand and Gravel sites to meet the following mineral requirements over the Plan Period. There would be no further need to identify any further Soft Sand and Crushed Rock sites.

- **Sand and Gravel- 2.649 million tonnes.**

42. The new Minerals and Waste Local Plan will review all mineral requirements over the new Plan period (at least a 15-year period), and identify the amount of mineral required and the ways in which this will be met.

Corporate Policies and Priorities

43. The LAA contributes to the corporate policy on climate change, the vision for thriving communities and thriving economy. It sets out the requirements for the raw materials required for growth following a full review of various factors. By recording and reviewing the supply and demand for minerals, it ensures we plan for future development well related to its need and based on the principles of sustainable development.

Financial Implications

44. The Minerals and Waste Plan is included within the Economy and Place Directorate and is in part being progressed within the existing base budget for the council's minerals and waste policy function. The LAA forms part of this work-stream and it does not raise any additional financial or staff implications.

Comments checked by:

Rob Finlayson, Strategic Finance Business Partner (Environment & Highways and Economy & Place), rob.finlayson@oxfordshire.gov.uk

Legal Implications

45. Under the Planning and Compulsory Purchase Act 2004 (as amended) and the NPPF, the council is required to prepare, monitor and, as necessary, review a minerals and waste local plan. An annual LAA, as required by the NPPF, is an essential part of the evidence base for a "sound" minerals and waste local plan and is also needed to enable the plan to be monitored. Under the Localism Act 2011, the Council is required to meet the duty to cooperate in the preparation of local plans and related activities in relation to strategic matters.

Comments checked by:

Jennifer Crouch, Principal Solicitor (Environment Team)
jennifer.crouch@oxfordshire.gov.uk

Staff Implications

46. The Minerals & Waste Local Plan is included within the work of the Economy and Place Directorate.

Equality & Inclusion Implications

47. None have been specifically identified.

Sustainability Implications

Email: charlotte.simms@oxfordshire.gov.uk

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