

Divisions Affected – All

CABINET

19th September 2023

Local Aggregate Assessment

Report by Corporate Director of Environment and Place

RECOMMENDATION

1. **The Cabinet is RECOMMENDED to**
 - a. Approve the Local Aggregate Assessment presented in Annex 2;
 - b. Authorise the Corporate Director of Environment and Place in consultation with the Cabinet Member for Climate Change Delivery and Environment to review and publish Oxfordshire's Recycled and Secondary Aggregate findings for 2022 once complete;
 - c. Authorise the Corporate Director of Environment and Place in consultation with the Cabinet Member for Climate Change Delivery and Environment to make any revisions and publish the Oxfordshire Local Aggregate Assessment for the calendar year 2022 on the Council website.

Executive Summary

2. Under the National Planning Policy Framework, July 2021 (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 Minerals 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.

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 2022.
6. By supporting the recommendation to adopt the latest LAA, the County Council is endorsing the provision levels set out in paragraph 11 of this report for use as evidence for the provision for mineral working in the Oxfordshire Minerals and Waste Plan, and for calculating the Oxfordshire landbank as at the end of 2022.

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 as set out in the latest LAA. Minerals Planning Authorities are required to maintain 7-year landbank for Sand and Gravel and 10 years for Crushed Rock.
8. The arrows in Table 1 indicate an increase or decrease from the previous year's LAA findings and the crosses and ticks highlight whether we are meeting our landbank requirements.
9. 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).

	Findings for 2022 mt- million tonnes	Findings compared with 2021
Sharp Sand and Gravel Sales	0.972mt	↓
Sharp Sand and Gravel Reserve	9.607mt	↓
Sharp Sand and Gravel Landbank¹ (7 years or more)	9.74years	✓
Soft Sand Sales	0.229mt	↓
Soft Sand Reserve	3.517mt	↓
Soft Sand Landbank (7 years or more)	14.47 years	✓
Crushed Rock Sales	1.146mt	↓
Crushed Rock Reserve	6.193mt	↓
Crushed Rock Landbank (10 years or more)	6.78years	✗

Table 1: Summary of mineral findings 2022

10. 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.

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

11. Following these considerations, to plan for a steady and adequate supply of minerals in Oxfordshire, it is proposed that the Aggregates Provision Rate is kept the same as last year's LAA for Soft Sand, however it is intended to increase the Crushed Rock Aggregates Provision Rate to the 10-year average of 0.914mtpa (million tonnes per annum), from the previous LAA APR of 0.824mtpa and to decrease the Sharp Sand and Gravel Aggregate Provision rate from 1.015mtpa to the 3 year average of 0.986mtpa. Therefore, the APRs for this year's LAA are:

- **Sharp Sand and Gravel – 0.986mtpa**
- **Soft Sand – 0.243mtpa**
- **Crushed Rock – 0.914mtpa**
- **Recycled and Secondary Aggregates - 0.926mtpa**

12. The Core Strategy, Policy M2, sets out the amount of minerals required over the current 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	2.437million tonnes
Soft Sand	0 million tonnes
Crushed Rock	0 million tonnes

Table 2: Core Strategy Mineral Requirements

13. However, this will not address the issue of the crushed rock landbank being below the 10 years required by the NPPF. Therefore, 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.

14. 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.

Local Aggregate Assessment

Sales

Primary won aggregate

15. 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 2022.

16. In 2022, all three land won minerals saw a decrease in their sales compared with 2021. Sand and gravel dropped by 16%, soft sand dropped by 13% and crushed rock dropped by 8.6%.

Recycled and Secondary Aggregates

17. Recycled aggregate is calculated using survey responses alongside the Environment Agency's Waste Data Interrogator. As the WDI for 2022 has not been released yet, this LAA is unable to calculate the Recycled Aggregate for 2022. Therefore this will be done separately and published on our website as soon as the work is complete.
18. The most recent data available is for 2021 which recorded sales in Recycled and Secondary Aggregate, of 0.416mt.

Rail Depots

19. In 2022, there were no survey returns from operators on sales from Rail Depots. However, due to increased rail depot capacity in 2021, sales from these depots are considered to be significant.

Supply

20. Oxfordshire is a mineral rich county which currently has 24 quarries with 12 Sharp Sand and Gravel permissions, 8 Soft Sand permissions and 15 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

21. At the end of 2022, Oxfordshire had twelve Sand and Gravel quarries, one of which has not yet commenced and two currently inactive. No planning applications were for additional mineral were determined in 2022, and there were two Sharp Sand and Gravel planning applications outstanding at the end of 2022.
22. Total permitted reserves of Sharp Sand and Gravel in Oxfordshire at the end of 2022 were 9.607mt.

Soft Sand

23. In Oxfordshire, at the end of 2022, there were eight sites with planning permission for Soft Sand extraction, with one currently inactive. No planning applications for additional soft sand were granted in 2022.
24. Total permitted reserves for Soft Sand in Oxfordshire at the end of 2022 were 3.517mt.

Crushed Rock

25. At the end of 2022, there were fifteen sites with planning permission for Crushed Rock extraction. There were twelve active sites and three now closed sites. One planning permission was granted for Crushed rock in 2022, this was at Enstone (MW100.21) for 150,000 tonnes, two thirds of which were to be used on the agricultural holding and the remaining exported. There were also three planning applications for Crushed Rock outstanding at the end of 2022.
26. Total permitted reserves for Crushed Rock in Oxfordshire at the end of 2022 were 6.193mt.

Recycled and secondary material sites

27. Total capacity for recycled and secondary aggregate at the end of 2022 was 1.503mtpa.

Rail Depots

28. Oxfordshire has four permitted rail depots, three of which are operational. Due to a planning decision in 2021, Oxfordshire increased its rail depot capacity to over 3.5 million tonnes.

Imports and Exports

29. 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.
30. The most recent, the 2019 Aggregates Minerals Survey for England and Wales (AM2019), was undertaken by British Geological Survey (BGS) under a contract with the Ministry of Housing, Communities and Local Government (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 Land Won Sand and Gravel and Crushed Rock.

Demand

31. 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.
32. 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 was inflation alongside the details of the mineral imports and exports figures from MHCLG in 2019.

Aggregate Provision Rates

33. Following these considerations, it is proposed that the Aggregates Provision Rate is kept the same as last year's LAA for Soft Sand, however it is intended to increase the Crushed Rock Aggregates Provision Rate to the 10-year average of 0.914mtpa, from the previous LAA APR of 0.824mtpa and to decrease the Sharp Sand and Gravel APR from 1.015mtpa to 0.986mtpa, which is the 3-year average. Therefore, the APRs for this year's LAA are:

- **Sharp Sand and Gravel – 0.986mtpa**
- **Soft Sand – 0.243mtpa**
- **Crushed Rock – 0.914mtpa**
- **Recycled and Secondary Aggregates - 0.926mtpa**

Landbank

34. Using the Aggregates Provision Rate above and the reserves available, the landbanks as at the end of 2022 are:

- **Sharp Sand and Gravel – 9.74 years**
- **Soft Sand – 14.47 years**
- **Crushed Rock – 6.78 years**

35. Minerals Planning Authorities are required to maintain at least a 7-year landbank for Sand and Gravel and at least 10 years for Crushed Rock. We are meeting the requirements for Sharp Sand and Gravel and Soft Sand, however our landbank for Crushed Rock is below 10 years for the fifth consecutive year.

36. This will be addressed as we prepare the new Minerals and Waste Plan.

Core Strategy Mineral Requirements

37. The Minerals and Waste Local Plan Part 1: Core Strategy (2017) sets out requirements for Sharp Sand and Gravel, Soft Sand and Crushed Rock for the Plan Period based upon the LAA2014 provision rates.

38. 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 are set out below:

	Core Strategy Requirements (2014-2031) (Mt – Million tonnes)	Remaining Requirement for the Plan Period
Sharp Sand and Gravel	18.27mt	2.437 million tonnes.
Soft Sand	3.402mt	0
Crushed Rock	10.512mt	0

Table 4: Core Strategy Requirements

New Minerals and Waste Local Plan

39. However, identifying the 2.437 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.
40. 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.

Conclusion

41. 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.
42. To ensure that supply continues to meet demand, the Aggregates Provision Rate (APR) included within the LAA are:
 - **Sharp Sand and Gravel – 0.986mtpa**
 - **Soft Sand – 0.243mtpa**
 - **Crushed Rock – 0.914mtpa**
 - **Recycled and Secondary Aggregates - 0.926mtpa**
43. Using these APRs and the Oxfordshire reserves at the end of 2022, the landbanks can be calculated as:
 - **Sharp Sand and Gravel – 9.74 years**
 - **Soft Sand – 14.47 years**
 - **Crushed Rock – 6.78 years**
44. To meet the Core Strategy requirements, we only 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- 2.437million tonnes.**
45. However, to meet our NPPF requirements to ‘plan for a steady and adequate supply of mineral over the Plan period’ and to maintain the Authorities 10- and 7-year landbanks (Crushed Rock and Sand and Gravel), we will need to review our mineral requirements, based on the Local Aggregate Assessment, as we prepare our new Minerals and Waste Plan.

Corporate Policies and Priorities

46. The LAA sets out the requirements for the materials required for Oxfordshire's local developments and infrastructure 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

47. The Minerals and Waste Plan is a function of the Environment and Place Directorate and is in part being progressed within the existing 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:

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Legal Implications

48. 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:

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Staff Implications

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

Equality & Inclusion Implications

50. None have been specifically identified.

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