Divisions Affected - All

CABINET

16 November 2021

Oxfordshire Local Aggregate Assessment 2020 & Oxfordshire Local Aggregate Assessment 2021

Report by Corporate Director Environment and Place

RECOMMENDATION

1. **The Cabinet is RECOMMENDED to**

   a) Approve the Local Aggregates Assessment for 2020 (LAA2020) and the Local Aggregates Assessment for 2021 (LAA2021) presented herewith;

   b) Authorise the Corporate Director 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 2020 and the Oxfordshire Local Aggregate Assessment 2021 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 purpose of an annual Local Aggregates Assessment (LAA) is to set the level of provision for the County Council as the Minerals Planning Authority to ensure an appropriate provision for Sand and Gravel and Crushed Rock extraction in Oxfordshire. This provision level is based on an assessment between the supply and demand of aggregate in Oxfordshire and evaluated through a review of the latest sales information, and all aggregate supply options and forecast demand. This assessment for provision is based on surveys and past sales.

4. The data is gathered though annual Aggregates Surveys of Mineral operators within Oxfordshire. Most years this survey is undertaken by Oxfordshire County Council on behalf of South East Aggregates Working Party. However, every four

to five years it is the responsibility of the British Geological Survey (BGS) on behalf of central government.

5. The latest LAA for Oxfordshire was produced in 2019 (LAA2019) which included the data from 2018. In 2020 the Aggregates Survey (AM2019) for the 2019 information was the responsibility of BGS, the results of which were published in August 2021. Hence there has been a delay in producing the LAA2020. The findings have now been published and have been used to prepare the LAA2020.

6. In addition, whilst waiting for the publication of the AM2019 findings, Oxfordshire County Council undertook the following year's Aggregates Survey for 2020 information (AM2021), on behalf of the South East Aggregates Working Party (SEEAWP). These findings have now been reviewed and used to prepare the LAA2021.

7. Therefore, this report covers both the LAA 2020 and LAA2021 in order to provide the most up to date information and evidence to inform mineral planning within Oxfordshire.

8. By supporting the recommendation to adopt the LAA2020 the County Council is endorsing the provision levels set out in paragraph 71 of this report for use as the basis for provision for mineral working in the Oxfordshire Minerals and Waste Local Plan and for calculating the Oxfordshire landbank as at the end of 2019.

9. By supporting the recommendation to adopt the LAA2021 the County Council is endorsing the provision levels set out in paragraph 72 of this report for use as evidence for provision for mineral working in the Oxfordshire Minerals and Waste Local Plan and for calculating the Oxfordshire landbank as at the end of 2020, against which the Core Strategy policies of the Minerals and Waste Local Plan are monitored.

Summary of Main Findings

10. Table 1 provides summary of the main findings in relation to sales, reserves and landbank of Primary Won Aggregates as set out in the LAA2020 and LAA2021. The arrows indicate an increase or decrease from the previous LAA findings. For a full summary of Key Data including average 10-year sales and 3-year sales, please see Annex 1 and Annex 2 or for full historic records see the Appendices of each LAA.

	LAA 2020		LAA 2021	
Sharp Sand and Gravel Sales	0.994mt	⇧	0.830mt	⇩
Sharp Sand and Gravel Reserve	12.075mt	⇩	11.439	⇩

	LAA 2020		LAA 2021	
Sharp Sand and Gravel Landbank[1] (7 years or more)	11.9 years	✓	11.27	✓
Soft Sand Sales	0.254mt	↑	0.210mt	↓
Soft Sand Reserve	3.047mt	↓	3.915mt	↑
Soft Sand Landbank (7 years or more)	12.5 years	✓	16.11 years	✓
Crushed Rock Sales	0.843mt	↑	1.087mt	↑
Crushed Rock Reserve	6.741mt	↓	7.151mt	↑
Crushed Rock Landbank (10 years or more)	5.96 years	✗	9.19 years	✗

Table 1: Sales, reserves and landbank of primary won aggregate.

11. Detailed assessments of supply and demand were carried out. These assessments included evidence of sales figures, economic forecasts, infrastructure requirements, population and housing, and sales figures. Also considered were the effects of Covid for 2021 and a review of the latest imports and exports figures from MHCLG. It is intended to maintain the LAA2019 level provision figures for both the LAA2020 and LAA2021, and these are:

- **Sand and Gravel – 1.015mtpa**
- **Soft Sand – 0.243mtpa**
- **Crushed Rock – 0.778mtpa**
- **Recycled and Secondary Aggregates - 0.926mtpa**

12. The Core Strategy, Policy M2, sets out the amount of mineral to be provided through the Site Allocations Plan. This was based on the LAA2014 provision rates.

	Core Strategy Requirements identified through LAA 2020	Core Strategy Requirements identified through LAA 2021
Sharp Sand and Gravel	2.73million tonnes	1.638million tonnes
Soft Sand	0	0
Crushed Rock	0	0

13. As the Minerals and Waste Planning Authority, the County Council has a duty under the National Planning Policy Framework to "plan for and maintain a steady and adequate supply of mineral". This is measured through the LAA's

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

and our landbank provision. Our current landbank for Soft Sand and Sharp Sand and Gravel is above the 7-year requirement in the NPPF, however upon completion of the LAA2021, the Crushed Rock landbank has been found to have fallen below the 10 years required for 3 consecutive years. This has triggered a policy review of the Oxfordshire Minerals and Waste Core Strategy (2017), particularly policy M2 for Crushed Rock and is likely to require additional sites to be identified as part of ongoing work to prepare the Site Allocations Plan.

14. The annual Local Aggregate Assessments (LAA2020, LAA2021) provide the provision figures and evidence needed to inform the Core Strategy review and the preparation of the Site Allocations Plan. The latest identified requirements are set out below.

	Local Aggregate Assessment 2020 Requirements	**Local Aggregate Assessment 2021 Requirements**
Sharp Sand and Gravel	2.73million tonnes	1.638million tonnes
Soft Sand	0.077million tonnes	0
Crushed Rock	1.842million tonnes	0.895 million tonnes

Local Aggregate Assessment 2020 and 2021

Sales

Primary won Aggregate

15. Annex 1 and Annex 2 set 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 2019 and 2020.

16. In 2019, all three land won minerals saw an increase in their sales compared with 2018, and also the 10 and 3-year averages increased for all mineral types. For Sharp Sand and Gravel they were the highest sales since 2006.

17. In 2020 sales of Soft Sand and Sharp Sand and Gravel decreased compared with 2019 sales, however Crushed Rock sales increased.

18. The 10-year sales average for all three minerals increased again in 2020. For Soft Sand in 2020, there was a decrease in the 3-year sales average, whereas for Sharp Sand and Gravel and Crushed Rock there was a further increase.

Rail Depots

19. Sales from the Rail Depots dropped in 2020 compared to 2018, this could be due to the impact of the pandemic and Covid lockdown so will need to be reviewed in the 2021 LAA.

Recycled and Secondary Aggregate

20. In 2019, sales of recycled and secondary aggregates recorded in the survey were 0.372mt. although 2019 had a very poor response to the County Council survey with only 31% of operators returning their figures for recycled and secondary aggregate facilities.

21. In 2020, the recycled and secondary aggregates survey recorded another poor response from operators. To ensure a more accurate picture of the sales of secondary and recycled aggregates, estimates were made for those sites we had previous received sales returns for information from planning applications was used. This gave a 56% rate for completion. 2020 therefore has recorded sales in Recycled and Secondary Aggregate of 0.439mt for a 56% survey rate.

22. Having considered the sales trends and other relevant information in the LAA 2020 and LAA2021 the figure for recycled and secondary aggregate should be the provision figure set in the Oxfordshire Minerals and Waste Local Plan: Part 1 – Core Strategy 2017, Policy M3 which is 0.926mtpa.

Supply

23. Oxfordshire is a mineral rich County and currently has 24 quarries with 11 sharp sand and gravel permissions, 8 soft sand permissions and 14 crushed rock permissions. Some sites produce a number of mineral types within them. This makes us one of the major mineral producers in the Region and even Nationally. We have more crushed rock producing sites than the rest of the South East combined.

Sand and Gravel

24. At the end of 2019 and 2020, there were 11 Sand and Gravel quarries within Oxfordshire. No planning permissions were granted and there was one Sharp Sand and Gravel planning application outstanding for both years.

25. The permitted reserves of sharp sand & gravel as at 31 December 2019 amounted to 12.075mt (11.9 year landbank), whilst at the end of 2020 they were 11.439mt (11.3-year landbank).

Soft Sand

26. At the end of both 2019 and 2020, Oxfordshire had eight active sites with planning permission for Soft Sand extraction. A planning permission for 1.8mt of soft sand was granted at Shellingford in 2020 and there is another planning application outstanding at the end of 2020.

27. Total permitted reserves for Soft Sand at the end of 2019 were 3.047mt (12.5-year landbank) and at the end of 2020 were 3.915mt (16.1-year landbank).

Crushed Rock

28. At the end of 2019 and 2020, there are 14 sites with planning permission for Crushed Rock extraction. There are 11 active sites and 3 inactive sites. A planning permission for 1.8mt of Crushed Rock was granted at Shellingford in 2020 and there were three planning applications for crushed rock outstanding at the end of 2020.

29. Total permitted reserves for Crushed Rock in Oxfordshire at the end of 2019 were 6.741mt. (5.96year landbank) and at the end of 2020 were 7.151mt (9.19year landbank).

Core Strategy Requirements

30. 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.

31. 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 Core Strategy Requirements identified through LAA 2020**	**Remaining Core Strategy Requirements identified through LAA 2021**
Sharp Sand and Gravel	18.27mt	2.73mt	1.638mt
Soft Sand	3.402mt	0	0
Crushed Rock	10.512mt	0	0

Local Aggregate Assessment Requirements

32. The annual Local Aggregate Assessments (LAA2020, LAA2021) provide the provision figures to maintain a steady and adequate supply of mineral over the Plan period. This is also needed to inform the Core Strategy review and the preparation of the Site Allocations Plan.

33. To identify how much mineral we need to meet the LAA requirements we have used the LAA 2014-2018 up until 2018 and then taken the LAA2019, LAA2020 and LAA 2021 provision figure to the end of the Plan Period.

34. 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 LAA Requirements are set out below:

	Local Aggregate Assessment Requirements (2014-2018)	**Local Aggregate Assessment 2020 Remaining Requirements**	**Local Aggregate Assessment 2021 Remaining Requirements**
Sharp Sand and Gravel	18.27mt	2.73million tonnes	1.638million tonnes

Soft Sand	4.104mt	0.077mt	0
Crushed Rock	13.034mt.	1.842mt	0.895mt

Supply Conclusion

35. To meet the Core Strategy Requirements, the Sites Allocation Plan based on the LAA2020 findings would only have needed to identify sites meet the need for 2.73million tonnes of Sharp Sand and Gravel. In light of the LAA2021 we would only need to identify sites to meet the need of 1.63million tonnes.

36. However only identifying sites to meet the Core Strategy requirement will not address us falling below our required 10-year landbank for Crushed Rock. Therefore, it would not meet the requirements of the NPPF.

37. Our intention had been to address this landbank issue through identifying sites through our Site Allocations Document based on the latest Local Aggregate Assessment requirements.

38. However, following a review of the evidence for the Core Strategy and the Inspector's Reports and advice from our "critical friend" North Northamptonshire Council, we concluded that the Site Allocations Document is required to identify only the sites needed to meet the requirement as set out for the Core Strategy above; not the requirements of the latest Local Aggregates Assessment (LAA). Consequently, the landbank for Crushed Rock issue will not be able to be addressed through the Site Allocations Document at this current stage.

39. We are therefore intending to carry out a consultation on a Core Strategy Review, which at this stage has identified the need for a Partial Update of the Core Strategy in relation to Policy M2.

40. Based on this Review and Partial Update, we will then be able to identify additional future sites, as needed for Sharp Sand and Gravel, Soft Sand and Crushed Rock to meet the LAA identified mineral requirements over the Plan Period.

41. The LAA2020 for the 2019 data shows that based on Local Aggregates Assessments we will need to identify sites to meet the following need:

- **Sand and Gravel– 2.73million tonnes.**
- **Soft Sand - 0.077 million tonnes**
- **Crushed Rock - 1.842 million tonnes**

42. However, the LAA2021 includes the more recent 2020 data shows that based on Local Aggregates Assessments we will need to identify sites to meet the following need:

- **Sand and Gravel– 1.63million tonnes.**
- **Soft Sand - 0 million tonnes**
- **Crushed Rock - 0.895million tonnes**

Recycled and Secondary Aggregate sites

43. At the end of 2019, Oxfordshire's capacity to produce recycled and secondary aggregate in 2019, as recorded for the SEEAWP survey was approximately 562,000tonnes. Permitted Capacity taken from planning decisions, application statements and previous survey findings at the end of 2019 was 1.484mt.

44. At the end of 2020, Oxfordshire's capacity to produce recycled and secondary aggregate was approximately 0.824mt. Permitted Capacity taken from planning decisions, application statements and previous survey findings at the end of 2020 was 1,484,199mt

Rail Depots

45. Oxfordshire has four permitted rail depots, three of which are operational. We were unable to get returns for 2019 data, however we received the data in 2020, The combined sales from the three railhead depots operational represented 74% of the total throughput capacity of these three depots. If the permitted railhead depot at Shipton on Cherwell is developed, the capacity will be increased.

Relationships with other MPA's

46. 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.

47. The most recent is the 2019 Aggregates Minerals Survey for England and Wales (AM2019) which was undertaken by British Geological Survey (BGS) under a contract with the Ministry of Housing, Communities and Local Government (MHCLG). The AM2019 sets out aggregate movements at a sub-regional level and Mineral Planning Authority level. It does not separate Soft Sand and Sharp Sand and Gravel.

48. Annex 3 and Appendix 2 of the LAA2020 provide greater detail on the quantity of mineral Oxfordshire exports, imports and consumes .

49. Total primary aggregate sales within Oxfordshire have increased since 2014, however the South East as a whole has seen an overall decrease.

50. Oxfordshire has increased in Land Won Sand and Gravel sales since 2014, though sales in Crushed Rock sales have decreased in the same period.

51. Comparison of the AM2009, AM2014 and AM2019 results show that Oxfordshire is now a net exporter of Sand and Gravel and Crushed Rock.

52. For Sand and Gravel, the exports doubled in 2014 from those in 2009 and have doubled again in 2019.

53. The table below provides a summary of the amount of Mineral we exported in 2019.

Destination	Land won sand and gravel	MPA%	AWP%	Crushed Rock	MPA	AWP%
Oxfordshire	772	62%		260	31%	
South East	369	30%[2]		404	48%	
Elsewhere	43	3%		178	21%	
Unallocated	64	5%				
	1248	100%	20%	843	100%	42%

Sand and Gravel Imports and Exports

54. Exports make up approximately 38% of Oxfordshire's total sand and gravel sales. The majority of exports were to within the South East. Hampshire and the Isle of Wight were one of the main Authorities that Oxfordshire exported sand and gravel to, along with Buckinghamshire & Milton Keynes.

55. Oxfordshire imported 0.128mt of Land won Sand and Gravel, up slightly from 2014, and 0.007mt tonnes of Marine Sand and Gravel.

56. This was mainly from Cambridgeshire, Lincolnshire, Staffordshire and Wiltshire as Oxfordshire imported between 1 % and 10% from each of these Authorities.

57. In total Oxfordshire made up 6.3% of the Sand and Gravel imports into the South East Region.

Crushed Rock Imports and Exports

58. Oxfordshire changed from a net importer of Crushed Rock in 2014 to a net exporter in 2019. Oxfordshire exported over half a million tonnes of Crushed Rock in 2019 compared with importing 356,000 tonnes from outside the County. This is a change from 2014 where we were a net importer.

59. Table 6.3 shows that exports make up approximately 69% of Oxfordshire's total sales. The majority of exports were within the South East. Figures show that Northamptonshire was one of the main Authorities that Oxfordshire exported Crushed Rock to, along with Buckinghamshire & Milton Keynes, Warwickshire and Berkshire.

60. With such considerable exports occurring with Oxfordshire's minerals, it is felt further work is required to fully understand the implications of this on the Oxfordshire Minerals and Waste Local Plan and future LAA's. Officers will continue to review any additional information in relation to Mineral movements

[2] There appears to be a print error in the AM2019 survey as has this figure as 60% but doesn't reflect 369,000 tonnes as a total 1,248,000 tonnes. Recalculated for this LAA as 30%

from the British Geological Survey BGS / Ministry of Housing, Communities and Local Government (MHCLG) AM2019 Survey as it may become available.

61. Imports and Exports will therefore remain a significant consideration in planning for future provision, both through the Core Strategy review and the Site Allocations Plan. These factors shall be monitored under the Duty to Cooperate and, if necessary, Statements of Common Ground between Authorities.

Factors affecting supply and demand

62. 2019 saw an increase in sales of all primary aggregate compared to 2018. Whereas 2020 saw a decrease in both Sharp Sand and Gravel and Soft Sand. Whether this decrease can be attributed to Covid, it is too early to say.

63. There are a number of major infrastructure projects as well as local housing and transport projects planned for over the Plan period, that could affect demand for aggregate. These include economic growth; population growth and house construction; major infrastructure projects and key developments. As well as consideration of the impacts of imports and exports now that the AM2019 has been published

64. In concluding Oxfordshire's LAA 2020 and 2021, due to indications of continued growth and predicted future growth in economic and construction activity, it is intended to maintain the LAA2019 level provision figures, and these are:

- **Sand and Gravel – 1.015mtpa**
- **Soft Sand – 0.243mtpa**
- **Crushed rock – 0.778mtpa**

65. The LAA2020 for the 2019 data shows that based on Local Aggregates Assessments we will need to identify sites to meet the following need:

- **Sand and Gravel– 2.73million tonnes.**
- **Soft Sand - 0.077 million tonnes**
- **Crushed Rock - 1.842 million tonnes**

66. However, the LAA2021 which includes the more recent 2020 data shows that based on Local Aggregates Assessments we will need to identify sites to meet the following need:

- **Sand and Gravel– 1.63million tonnes.**
- **Soft Sand - 0 million tonnes**
- **Crushed Rock - 0.895 million tonnes**
- **Recycled and Secondary Aggregates- 0.926mtpa**

Corporate Policies and Priorities

67. The Local Aggregates Assessments 2020 and 2021 contribute 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

68. The Minerals and Waste Plan is included within the work priorities of the Environment and Place Directorate and is in part being progressed within the existing mainstream 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 section must be included in every report unless purely procedural.

Comments checked by:
Rob Finlayson, Finance BP, Rob.Finlayson@oxfordshire.gov.uk

Legal Implications

69. 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 Environmental,
Jennifer.crouch@oxfordshire.gov.uk

Staff Implications

70. The Minerals & Waste Local Plan is included within the work priorities of the Environment and Place Directorate. The programme for preparation of the Minerals and Waste Local Plan Documents takes into account the availability of staff and financial resources relative to the work expected to be required. The County Council considers the programme in this scheme to be realistic, subject to no significant unforeseen circumstances arising.

71. The plan will be prepared in-house by the Council's Minerals and Waste Policy Team of three officers (Minerals and Waste Local Plan Manager, Principal and Planning Policy Officer), under the direction of the Assistant Director Strategic Infrastructure and Planning and the Corporate Director for Environment & Place. The team will, as required, draw on: administrative and technical support from

within the wider Service; specialist input, particularly on transport, landscape, ecology and archaeology, from elsewhere within the Council; and input on communications from within the Council.

72. Due to the resources required for the additional evidence gathering and to see the Plan through to adoption, external consultant support has been sought and appointed. Consultants will assist with the technical background work required to prepare the Site Allocations Document, including the Sustainability Appraisal, Site Assessments, Habitats Regulation Assessment and Strategic Flood Risk Assessment.

73. Additional external consultants and temporary staff will be used where necessary, in particular if required to provide specialist input that is not available within the Council. This may include support on: Local Aggregate Assessment; Waste Needs Assessment; Authorities Monitoring Report and facilitation of stakeholder meetings.

Equality & Inclusion Implications

74. None have been specifically identified

Sustainability Implications

75. As the two LAA's set out findings and conclusions on aggregates in Oxfordshire and they do not change any provision rates, a Climate Change Assessment is not required. A Climate Change Assessment will be required for the Partial Update on the Core Strategy and Site Allocations Plan.

Risk Management

76. Having an up to date and robust LAA in place is necessary for the effective monitoring of the adopted Core Strategy and to provide an indicator for when consideration needs to be given to review of the plan. It will assist the preparation of the Site Allocations Plan including in helping the Council to demonstrate that the Core Strategy continues to provide a sound basis for it. It will be an important factor in the determination of planning applications for mineral working where the size of the landbank is a material consideration.

Consultations

77. The NPPF requires the Council to consult and take into account the advice of the South East England Aggregate Working Party (SEEAWP); a draft revised Oxfordshire LAA 2020 and LA2021 is due to be considered by SEEAWP. Comments from this meeting will be provided orally to Corporate Director and Cabinet Member before publication of the LAA2020 and LAA2021. There is no requirement for wider consultation on LAAs. This is a technical document that

will form part of the evidence base of future Plan preparation and as such will be published alongside the Core Strategy Review and Site Allocations Plan.

Bill Cotton
Corporate Director Environment and Place

Annex:	Annex 1: Summary of Key Data 2019 Annex 2: Summary of Key Data 2020 Annex 3: Comparison of Imports and Exports 2019 Annex 4: Oxfordshire Local Aggregate Assessment 2020 Annex 5: Oxfordshire Local Aggregate Assessment 2021
Background papers:	Local Aggregate Assessment 2018 Collation of the results of the 2019 Aggregates Minerals Survey for England and Wales
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November 2021