

# **OXFORDSHIRE LOCAL AGGREGATE ASSESSMENT**

**(Calendar year 2022)**

**September 2023**

Prepared by Oxfordshire County Council  
August 2023 (including information provided in 2014 by LUC and Cuesta Consulting  
Limited)



# Contents

1.Oxfordshire Summary of Key Data 2022 .....	5
2.Executive Summary.....	7
3. Demand .....	11
Land Won Aggregate .....	11
Sharp Sand and Gravel Past Sales.....	11
Soft Sand Past Sales .....	13
Crushed Rock Past Sales .....	15
Secondary and Recycled Aggregate.....	16
Imports of Secondary Aggregates .....	17
Rail Depots.....	17
Consumption .....	19
4.Factors affecting demand .....	21
The Economy and Growth .....	21
Major Infrastructure Projects/Key Development.....	23
Population and Housing Growth .....	24
Conclusion.....	26
5. Aggregate Provision Rates.....	27
Sharp Sand and Gravel Aggregate Provision Rate .....	27
Soft Sand .....	28
Crushed Rock .....	29
Conclusion for LAA provision figures .....	31
6.Supply.....	32
Oxfordshire Supply.....	32
Recycled and Secondary Aggregate.....	32
Imports and Exports .....	36
Sharp Sand and Gravel.....	37
Crushed Rock .....	38
7.Quarries .....	40
Sharp sand and gravel .....	40
Soft Sand .....	41
Crushed Rock .....	43
Rail Depots .....	44
Landbanks .....	45

8. Core Strategy Mineral Requirements .....	46
9. Conclusion .....	47
9. List of Definitions and Acronyms .....	48
Appendix 1 .....	50
Oxfordshire’s Historical Mineral Sales .....	53
Sharp Sand and Gravel 2003-2022 (million tonnes) .....	53
Sales of Soft Sand 2003–2022(million tonnes) .....	57
Sales of Crushed Rock 2003 – 2022 (million tonnes) .....	59
Appendix 2 .....	62
Imports and Exports .....	62
Imports, Exports and Consumption of Primary Aggregates in Oxfordshire .....	62
Destinations .....	64
Destinations of Sand & Gravel Produced in Oxfordshire 2009 and 2014 .....	64
Destinations of Crushed Rock Produced in Oxfordshire 2009 and 2014 .....	64
Destinations of Sand & Gravel Produced in Oxfordshire 2019 .....	65
Destinations of Crushed Produced in Oxfordshire 2019 .....	66
Destinations of Crushed Rock Produced in Oxfordshire 2005 and 2009 .....	68
Sources .....	69
Sources of Sand and Gravel consumed in Oxfordshire 2009 .....	69
Sources of Crushed Rock consumed in Oxfordshire 2009 .....	69
Sources of Sand and Gravel consumed in Oxfordshire 2014 .....	70
Sources of Crushed Rock consumed in Oxfordshire 2014 .....	70
Sources of Sand and Gravel consumed in Oxfordshire 2019 .....	70
Sources of Crushed Rock Gravel consumed in Oxfordshire 2019 .....	71
Appendix 3 .....	72
Mineral provision requirements over the Plan period .....	72
Appendix 4 .....	76
Population .....	76
Housing Completion Figures .....	77

# 1.Oxfordshire Summary of Key Data 2022

Summary – Oxfordshire County Council 2022 (million tonnes)									
Quarry Sales	2022 Sales (Mt) & Trend	Average (10-yr) Sales & Trend	Average (3-yr) Sales & Trend	Annual Provision Rate (APR) (Mt <sup>2</sup> )	Reserve (Mt)	Landbank (years)	Allocations (years)	Capacity (Mtpa)	Comments
Soft Sand	↓ 0.229	↑ 0.23	↓ 0.234	0.243	↓ 3.517mt	14.47	N/A	1.701	LAA rate remains at 0.243mtpa Landbank above 7-year requirement
Sharp Sand & Gravel	↓ 0.972	↑ 0.791	↓ 0.986	0.986	↓ 9.607	9.74	N/A	0.317	LAA rate changed to 3 year average Landbank above 7-year requirement
Crushed Rock	↓ 1.146	↑ 0.914	↑ 1.162	0.914	↓ 6.193	6.78	N/A	1.688	LAA rate changed to 10 year average Landbank remains below 10-year requirement
Recycled / Secondary Aggregates	↓ .416	.420	0.409	0.926	N/A	N/A	N/A	1.534	Currently 2021 figures until these can be updated with the release of EA Data Calculated using SEEAWP Methodology.

<b>Rail Depot Sales (Sand &amp; Gravel)</b>	c	c	c	c	c	c	c	C	Due to confidentiality due to two operators of the four sites, we are unable to share these figures
<b>Rail Depot Sales (Crushed Rock)</b>	c	c	c	c	c	c	c	C	Due to confidentiality, we are unable to share these figures

**General Comments**

2022 saw sales reduce in all areas, compared with 2021. However, 2021 was an unusual year as it followed the lockdowns of the Covid pandemic.

The LAA Aggregate Provision Rate for Sharp Sand and Gravel has been changed to the 3-year average following a review of demand, consumption, imports and exports and other local factors such as economic growth, population and housing.

The 2022 LAA Aggregate Provision Rate for Soft Sand remains the same as 2021 at 0.243mtpa.

The 2022 LAA Aggregate Provision Rate for Crushed Rock has been changed to the 10 year average following a review of demand, consumption, imports and exports and other local factors such as economic growth, population and housing.

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.

Using the Crushed Rock LAA Rate, we are still below the required 10-year landbank for the fifth consecutive year. This issue will be considered within the preparation of the Minerals and Waste Local Plan

## 2.Executive Summary

- 2.1 The National Planning Policy Framework, July 2021 (NPPF) states that mineral planning authorities should prepare an annual Local Aggregate Assessment (LAA)
- 2.2 The LAA is required to:
- Forecast the demand for aggregates based on average 10 years' sales data and other relevant local information;
  - analyse all aggregate supply options and;
  - assess the balance between demand and supply.
- 2.3 This is the eleventh LAA for Oxfordshire and includes the 2022 aggregate sales and reserves data for the County. The 10-year period covered by this LAA is 2013 up to 2022 and the three-year period is 2020 – 2022.
- 2.4 The primary aggregate figures within this LAA are taken from the 2022 Aggregates Minerals (AM2021) undertaken by the County Council on behalf of South East England Aggregate Working Party.

### **Demand**

#### **Sand and Gravel**

- 2.5 Sales of Sharp Sand and Gravel decreased in 2022 to 0.972mt. This is a 16% decrease on 2021. There was an 5.5% increase in the 10-year sales average (0.791mt from 0.750mt). The 3-year sales average of Sharp Sand and Gravel decreased by 1% to 0.986mt, which remains higher than the 10-year average. Both are still below the 2021 LAA Aggregate Provision Figure (APR) and Core Strategy Requirements.
- 2.6 Having considered the sales trends and other relevant information contained within this report, it is considered necessary to change the Aggregates Provision Rate for Sharp Sand and Gravel to the 3 year sales average of 0.986mt.
- 2.7 Sales of Soft Sand in 2022 decreased to 0.229mt, a decrease of 13%. The 10-year sales average increased 3.35% to 0.23mt, above the Core Strategy provision figure of 0.189mtpa, however it is below the current LAA APR of 0.243mtpa. The 3-year sales average decreased 3.6% on the previous year to 0.234mt which is slightly lower than the current LAA APR (0.243mtpa).
- 2.8 Having considered the sales trends and other relevant information contained within this report, is not considered necessary to change the current Aggregate Provision Rate for Soft Sand and it will remain at 0.243mtpa.

#### **Crushed Rock**

- 2.9 Sales of Crushed Rock decreased 8.6% in 2022 to 1.146mt which in turn saw the 10-year sales average increase 12.3% to 0.914mtpa. This is above the Core Strategy provision figure of 0.584mtpa, and above the current LAA APR of 0.824mtpa. The 3-year sales average rose 9.6% to 1.162mt on the previous 3-year period and is now higher than the current LAA APR of 0.824.

- 2.10 Having considered the sales trends and other relevant information contained within this report, it is therefore considered necessary to change the Aggregate Provision Rate for Crushed Rock to the 10 year average of 0.914mtpa.

### **Rail Depots**

- 2.11 In 2022, there were no returns from operators on sales from Rail Depots. However, due to a number of planning decisions in 2021, Oxfordshire has increased its rail depot capacity to over 3.5million. It is known that the increased capacity at Hennef Way Banbury is temporary to provide material for HS2, and Appleford Sidings has added two more rail sidings. This site now has a planning condition limiting it to 1.5million tonnes per annum.

### **Recycled and Secondary Aggregates**

- 2.12 To try and ensure a more accurate picture of the sales of secondary and recycled aggregates over time, this LAA uses the methodology provided by the South East Aggregates Working Party for calculating recycled aggregate sales. This uses any real data from the AM Survey, if received, and then an estimate calculated from the Environment Agency's Waste Data Interrogator (WDI).
- 2.13 Due to the Environment Agency's data on CDE in the Waste Data Interrogator for 2022 not being released yet, we are unable to estimate the Construction, Demolition and Excavation Waste arisings in Oxfordshire for 2022. This will be published on the Councils website once the data is released and the analysis undertaken.
- 2.14 So at this time we will still use 2021 data, and the LAA APR figure for recycled and secondary aggregate should be maintained as the provision figure set in the Oxfordshire Minerals and Waste Local Plan: Part 1 – Core Strategy 2017, Policy M3 which is 0.926mtpa.

### **Supply**

#### **Sand and gravel**

- 2.15 At the end of 2022, Oxfordshire had 12 sand and gravel quarries within Oxfordshire, one not yet commenced and two currently inactive. No Sand and Gravel planning applications were determined in 2022. There were two Sharp Sand and Gravel planning applications outstanding at the end of 2022.
- 2.16 Total permitted reserves of Sharp Sand and Gravel in Oxfordshire at the end of 2022 were 9.607mt. Using the latest Aggregates Provision Rate figures of 0.986 mtpa, this gives a landbank of 9.607years. This is in accordance with the National Planning Policy Framework (NPPF) requirements of a landbank of at least 7 years.

#### **Soft Sand**

- 2.19 In Oxfordshire, at the end of 2022, there are 8 sites with planning permission for Soft Sand extraction, with 1 currently inactive. No planning applications for Soft Sand were granted in 2022.
- 2.20 Total permitted reserves for Soft Sand in Oxfordshire at the end of 2022 were 3.517mt. Using the current Aggregates Provision Rate figure of 0.243 mtpa,



this gives a landbank of 14.5 years. This is in accordance with the NPPF requirements of a landbank of at least 7 years.

### **Crushed Rock**

- 2.24 At the end of 2022, there are 15 sites with planning permission for Crushed Rock extraction. There are 12 active sites and 3 closed sites. One planning permission was granted in 2022 at Enstone (MW.100.21) 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.
- 2.25 Total permitted reserves for Crushed Rock in Oxfordshire at the end of 2022 were 6.193mt. Using the latest LAA Aggregates Provision Rate of 0.914 mtpa this gives a landbank of years 6.78 years which is below the requirements of the NPPF of at least a 10 year landbank.

### **Recycled and secondary material sites**

- 2.26 Due to the Environment Agency's data on CDE in the Waste Data Interrogator for 2022 not being released yet, we are unable to estimate the Construction, Demolition and Excavation Waste arisings in Oxfordshire for 2022. This will be published on the Council's website once the data is released and the analysis undertaken.
- 2.27 At the end of 2021, Oxfordshire's capacity to produce recycled and secondary aggregate as recorded for the SEEAWP survey was approximately 0.416mt, due to low returns and estimates using the Environment Agency's Waste Data Interrogator. Permitted Capacity taken from planning decisions, application statements and previous survey findings at the end of 2022 was 1.503 billion tonnes.

### **Rail Depots**

- 2.28 Oxfordshire has four permitted rail depots, three of which are operational. No returns for the sales from the Depots were returned in 2022.

### **Relationships with other MPA's**

- 2.29 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.
- 2.30 The most recent is the 2019 Aggregates Minerals Survey for England and Wales (AM2019) was undertaken by British Geological Survey (BGS) under a contract with the then Ministry of Housing, Communities and Local Government (MHCLG). The AM2019 sets out aggregate movements at a sub-regional level. This was discussed within the LAA2020 but it highlighted that Oxfordshire is a net exporter of all Land Won Sand and Gravel and Crushed Rock.

### **Factors affecting supply and demand**

- 2.31 2022 has seen an decrease in sales of all primary aggregates compared to 2021.

2.32 2020 saw a global pandemic (Covid). The very high sales in 2021, could have been as a result of businesses and development commencing again after lockdowns, and a surge in building and construction to move planned projects forward as quickly as possible after Covid. However sales are still high for Sharp Sand and Gravel (3<sup>rd</sup> highest sales in the last 10 years) and Crushed Rock are the 2<sup>nd</sup> highest in the last 10 years.

2.33 There are major infrastructure projects as well as local housing and transport projects continuing to take place during the Plan period.

#### **Executive Summary Conclusion**

2.34 The purpose of an annual Local Aggregates Assessment 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.

2.35 To ensure that supply continues to meet demand, the **Aggregates Provision Rate (APR)** will be as follows for 2022 onwards:

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

2.36 Using these APRs and the Oxfordshire reserves at the end of 2022, the Landbank can be calculated as:

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

2.37 To meet the current Minerals and Waste Local Plan Part 1: Core Strategy (2017) 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.

- **Sand and Gravel – 2.437 million tonnes.**
- **Soft Sand – 0 million tonnes**
- **Crushed Rock – 0 million tonnes**

2.38 However this will not address the issue of the Crushed Rock landbank being below the at least 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.

2.39 Mineral requirements within the Core Strategy will be replaced with the mineral requirements as set out in the new Minerals and Waste Plan upon adoption.

### 3. Demand

#### Land Won Aggregate

#### Sharp Sand and Gravel Past Sales

- 3.1 Sales of Sharp Sand and Gravel from quarries in Oxfordshire for the period 2013 – 2022 are shown in Table 3.1. These figures are taken from two sources: The annual Aggregates Minerals Survey for England and Wales undertaken by Oxfordshire County Council on behalf of SEEAWP and the historic four/five yearly British Geological Survey (BGS) under a contract with the then Ministry of Housing, Communities and Local Government (MHCLG).

2013	2014	2015	2016	2017	2018	2019	2020	2021	2022	10-year average	Last 3-year average
0.401	0.639	0.768	0.651	0.703	0.796	0.994	0.830	1.157	<b>0.972</b>	<b>0.791</b>	<b>0.986</b>

**Table 3.1: Sales of Sharp Sand and Gravel 2013 – 2022 (million tonnes) (Sources: SEEAWP Aggregates Monitoring Surveys)**

Sales of Sharp Sand and Gravel decreased 16% in 2022 compared with 2021, though the sales are the 3<sup>rd</sup> highest in the last 10 years.

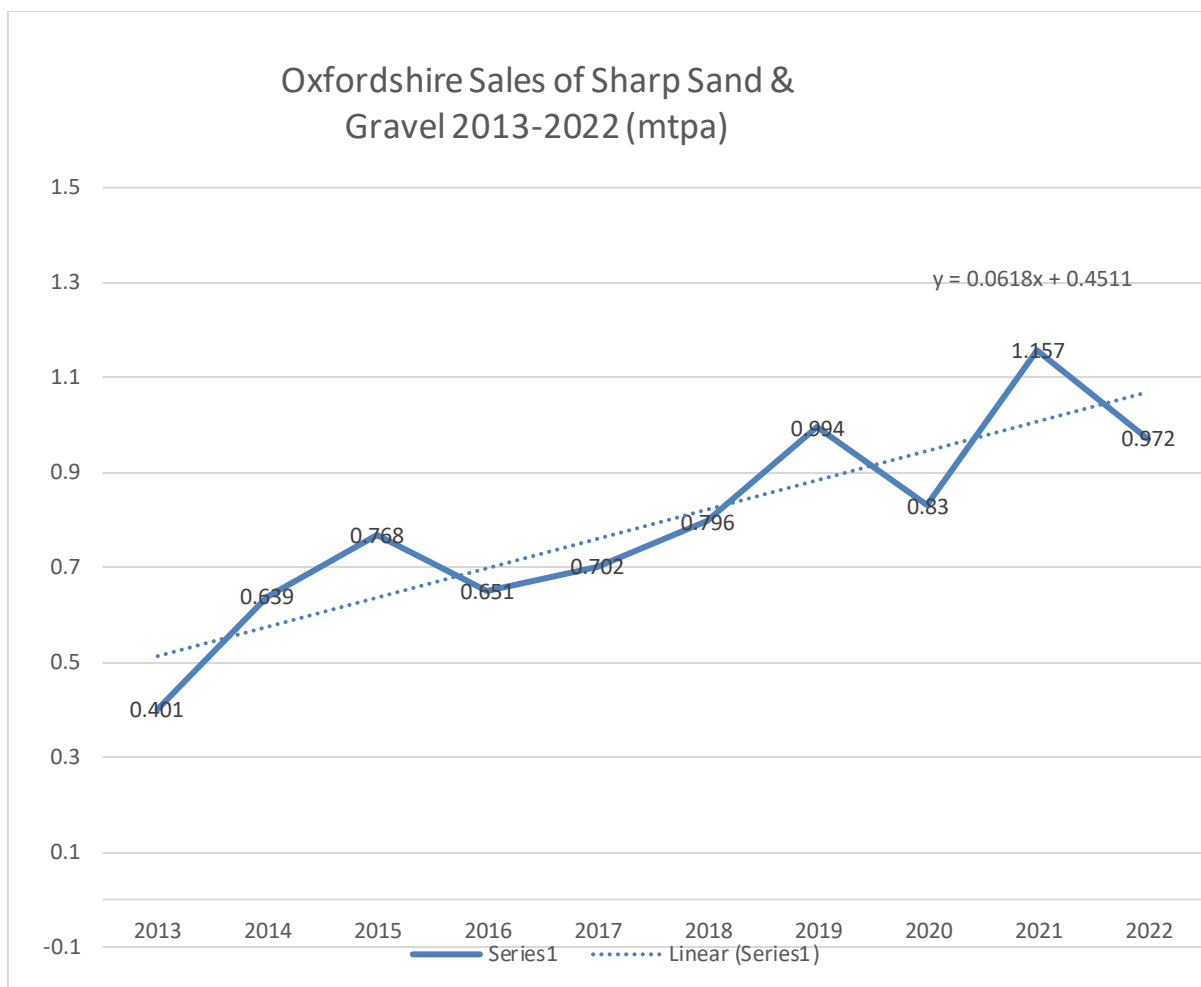
- 3.2 Sales in 2013 were still showing the effects of the economic recession and the weaker economic period of 2012. The closure of Caversham Quarry during 2013 also accounted for a reduced working of sand and gravel during this period. This closure was due to exhaustion of reserves in 2012, pending grant of permission for an extension which was approved in August 2014 but not commenced until 2017. The recession and the quarry closure are likely to have affected the total sales around 2014.
- 3.3 There was also a 15% fall in sales of Sharp Sand and Gravel from quarries in Oxfordshire from 2015 to 2016. Most of this decrease was accounted for by sales at one quarry - Bridge Farm, Sutton Courtenay. The fall in sales at this quarry in 2016 was caused primarily by a break in production whilst the determination and issue of the planning permission to work the full depth of gravel in Phase 4b at Bridge Farm was awaited; the permission was issued on 17 May 2016.
- 3.4 The shortfall in supply from Bridge Farm during this time was made up by imports of marine dredged material, delivered by rail from East London into Appleford Sidings, Sutton Courtenay Depot. Crushed Rock (limestone) was also imported by rail into this depot, from Somerset, and used to substitute sand and gravel.

- 3.5 In 2017 sales of sand and gravel extracted from Bridge Farm, Sutton Courtenay Quarry returned to the 2015 level; and overall sales of Sharp Sand and Gravel in Oxfordshire increased again.
- 3.6 In 2020, the Global pandemic Covid resulted in multiple lockdowns and industry closed or slowed down for periods, which caused a fall in sales. In addition Hatford was awaiting a determination for their western extension, which was submitted in 2019.
- 3.7 In 2021, developments and strategic projects both in Oxfordshire and neighbouring Authorities commenced again following the lockdowns of 2020. Also, production at the 2018 permission at New Barn Farm became established and there was permission for an extension at Hatford that enabled production on the site to continue in 2021.
- 3.8 All these factors have had implications for the 10-year average and 3 year average.
- 3.9 The 10 year average is currently 0.791tpa , which included the time period 2013-2017 and the associated factors for the reduced sand and gravel sales.
- 3.10 Since 2016 there had been a steady increase in Sharp Sand and Gravel sales. In 2020 there was a decrease in sales compared with 2019, due to COVID and lockdown. Sales in 2021 were the highest in the 10 year period, and whilst they have reduced by 16% in 2022, they are comparable with 2019, which was pre Covid. The 3 year average is 0.986tpa.
- 3.11 These figures are expected with the amount of residential and commercial growth taking place within and around Oxfordshire.
- 3.12 Based on linear trend analysis shown in Figure 3.1, the average rate of increase over the period 2013 to 2022 in Oxfordshire was 0.0618mtpa, giving a total increase of 0.618mtpa over the 10-year period with 3 intervals of decline. The periods of decline are previously discussed in 3.4-3.5.
- 3.13 There has been a 5.5% increase in the 10-year period and a 1% decrease in the 3-year period<sup>1</sup>. The 3-year sales average of Sharp Sand and Gravel is 24.6% higher than the 10-year average.

**Figure 3.1 Linear trend analysis - Sharp Sand and Gravel sales (mtpa) 2013-2022**

---

<sup>1</sup> Oxfordshire County Council LAA2021



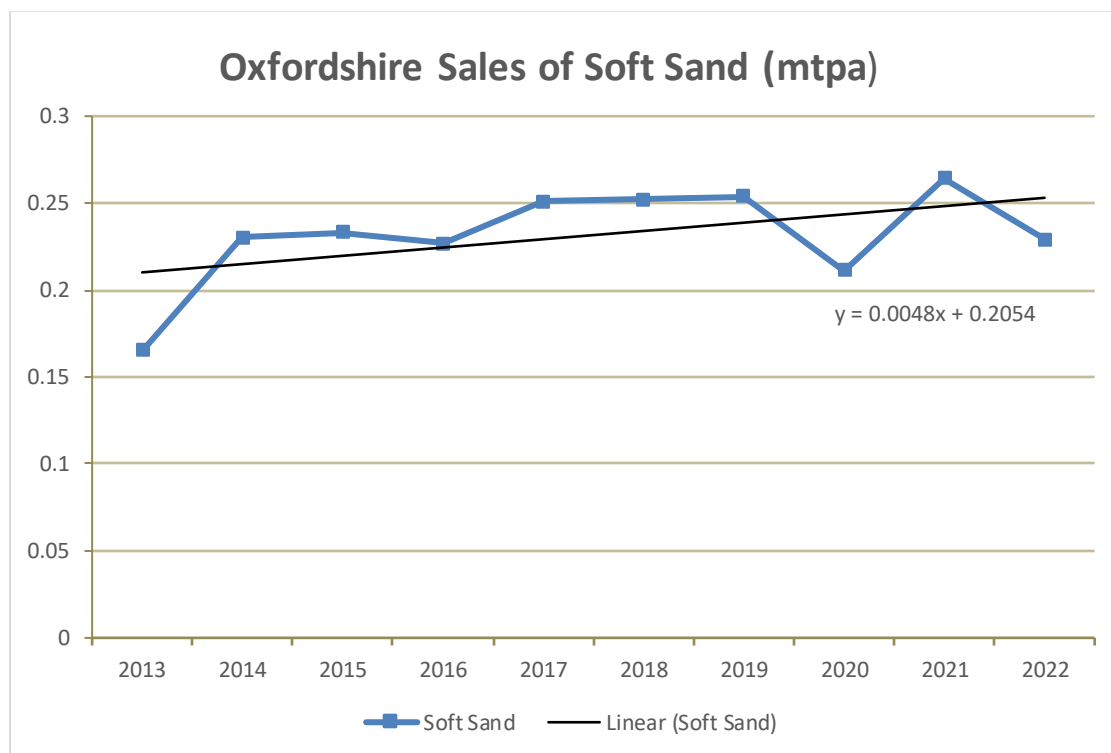
### Soft Sand Past Sales

3.14 Sales of Soft Sand from quarries in Oxfordshire 2013–2022 are shown in Table 3.2. These figures are taken from the 2021 Aggregates Minerals Survey undertaken by the County Council on behalf of the SEEAWP and the BGS Survey.

2013	2014	2015	2016	2017	2018	2019	2020	2021	2022	10 year average	3 year average
0.165	0.230	0.233	0.227	0.251	0.252	0.254	0.210	0.264	<b>0.229</b>	<b>0.230</b>	<b>0.234</b>

**Table 3.2: Sales of Soft Sand 2013 – 2022 (million tonnes) (Sources: SEEAWP Aggregates Monitoring Surveys)**

- 3.15 Like Sharp Sand and Gravel, sales in 2013 were still showing the effects of the economic recession and the weaker economic period of pre 2012. Though sales picked up and were steadily increasing up until Covid.
- 3.16 Hatford quarry gained permission in early 2021 which enabled production to continue on site. Planning permission for Shellingford was issued at end of 2020 and production resumed on site in 2021. Along with the post COVID surge in developments, this caused a sharp increase in the sales in 2021.
- 3.17 The sales for 2022 decreased from 2021 by 13% and are the 4<sup>th</sup> lowest sales in the last 10 years. This could be due to less demand, or it could be due to the geology of the sites. Soft Sand is often located with Crushed rock reserves, and if more Crushed Rock has been extracted from this site over 2022 due to geology, this may have an impact on our Soft Sand sales for that year. This will need to be monitored in future LAA's.
- 3.18 Linear trend analysis (Figure 3.2) over the period 2013 to 2022 reveals an average rate of increase of 0.0048mtpa for Oxfordshire, representing a total of 0.005mt (with three periods of decline) over the baseline period.
- 3.19 Sales saw a 3.35% increase in the 10-year period, but a 3.6% decrease over the 3-year period. However, the 3-year average is 1.2% higher than the 10-year baseline period<sup>2</sup>.



**Figure 3.2 Linear trend analysis – Soft Sand sales 2013-2022**

<sup>2</sup> Appendix 1

## Overall sand and gravel sales

- 3.20 Oxfordshires saw a 16% decrease in Sharp Sand and Gravel and a 13% decrease in Soft Sand giving an overall decrease of 14.5% in all Sand and Gravel, which is above the Mineral Products Associations (MPA<sup>3</sup>) findings for the same period. The MPA saw a 9.6% decrease for all Sand and Gravel<sup>4</sup> in the South East and 9.3% across Great Britain.

## Crushed Rock Past Sales

- 3.21 Sales of Crushed Rock from quarries in Oxfordshire for the period 2013– 2022 are shown in Table 3.3. These figures are taken from the Aggregates Monitoring Survey by SEEAWP and the BGS Survey.

2013	2014	2015	2016	2017	2018	2019	2020	2021	2022	10 year average	3 year average
0.502	1.061	0.914	0.715	0.867	0.751	0.843	1.087	1.254	1.146	0.914	1.162

Table 3.3: Sales of Sharp Crushed Rock 2013- 2022 (million tonnes) (Sources: SEEAWP Aggregates Monitoring Surveys)

- 3.22 The sales for 2022 decreased 8.6% compared with 2021, however sales were still at their second highest over the last 10 years.
- 3.23 The Minerals Products Association<sup>5</sup> records that across the UK crushed rock sales fell by between 14% and 3% with the average of 7.9% decrease for the 8 regions reported. Due to confidentiality issues results for the South East could not be reported.
- 3.24 The information we have received from Operators is that construction activity maintains relatively high within Oxfordshire and also within areas surrounding the County, with particular focus on all the growth centres for both residential and commercial developments.
- 3.25 It is also believed HS2 is also still demanding significant mineral, as shown by the demand for increased capacity at Banbury Rail depot to bring in more material to meet this projects requirement in 2021. There was application for 2.7 million tonnes of material at Finmere which is specifically for HS2 however this has now been withdrawn and construction of HS2 continues the materials for which could be being met from our Crushed Rock quarries, impacting significantly on our sales.

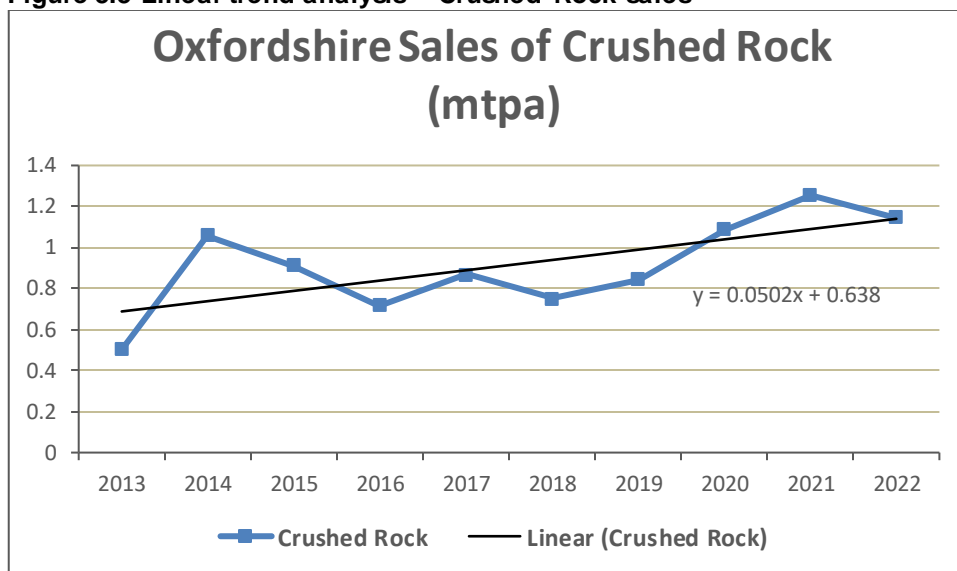
<sup>3</sup> [Regional overview of construction and mineral products markets in GB Spring 2023.pdf \(mineralproducts.org\)](#)

<sup>4</sup> [Regional overview of construction and mineral products markets in GB Spring 2023.pdf \(mineralproducts.org\)](#) NOTE: The MPAs also include Soft sand in their sand and gravel calculations

<sup>5</sup> [Regional overview of construction and mineral products markets in GB Spring 2023.pdf \(mineralproducts.org\)](#)

- 3.26 On top of this, we have been informed that there has been the significant demand for aggregate from the second Phase of East -West Rail (not Crossrail).
- 3.27 Since 2014, Crushed Rock sales have been consistently higher than those at the start of the 10-year baseline period. In 2022 there was a 12.3% increase on the previous 10-year period. The three-year average rose with an 9.6% increase on the previous 3-year period.
- 3.28 Linear trend analysis of Crushed Rock sales (Figure 3.3) over the period 2013 to 2022 reveals an average rate of increase of 0.0502mtpa for Oxfordshire. The resulting overall increase over that period is 0.502mt (4 periods of decline).

**Figure 3.3 Linear trend analysis – Crushed Rock sales**



### Secondary and Recycled Aggregate

- 3.29 Although reasonable data on recycling capacity is available for Oxfordshire, and whilst that may be indicative of increasing production and sophistication, there is only partial information on the actual levels of production and use of these materials.
- 3.30 Past aggregates monitoring surveys, for example, have not produced a full response from secondary and recycled aggregates site operators. This is a recognised issue across the South East, and to try and ensure a more accurate picture of the sales of recycled aggregates, it was decided by the South East Aggregates Working Party that Authorities could use the Environment Agency's Waste Data Interrogator (WDI) to estimate material recycled, if returns were insufficient.



- 3.31 Where returns were provided by operators these were used, and where they are not, a 50% average of material received into a CDE recycling site was taken from the WDI.
- 3.32 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.
- 3.33 For Secondary Aggregate sites, an estimate is made using averages from previous returns.
- 3.34 The most recent data available is for 2021 which recorded sales in Recycled and Secondary Aggregate, of 0.416mt.
- 3.35 It is likely that this estimated 2021 figures were significantly less than the total actual production. The surveys in the years 2013 and 2015 to 2017, particularly 2016, had significantly better response rates.

2012	2013	2014	2015	2016	2017	2018	2019	2020	2021	10 year average	3 year average
0.466	0.422	0.271	0.453	0.534	0.417	0.406	0.372	<b>0.439</b>	<b>0.416</b>	<b>0.420</b>	<b>0.409</b>

Table 3.4: Sales of Secondary and Recycled Aggregate 2012-2021 (Sources: SEEAWP Aggregates Monitoring Surveys)

- 3.36 Within the Mineral Products Association report “The Contribution of Recycled and Secondary Materials to Total Aggregates Supply in Great Britain - Estimates for 2021” it is reported in 2021, total recycled and secondary aggregates are estimated to have accounted for 28% of total aggregates supply in Great Britain.
- 3.37 If this percentage was rolled over to Oxfordshire’s total Aggregate sales for 2022, it could be estimated that 0.657million tonnes of recycled and secondary aggregate were sold in 2022.

#### Imports of Secondary Aggregates

- 3.38 No known secondary aggregates are currently transported into Oxfordshire. This is largely due to the costs of transporting the material, and because the exemptions from the aggregates levy, that gave secondary aggregates a cost advantage over primary aggregates were withdrawn in April 2014.

#### Rail Depots

- 3.39 There are three railhead depots in Oxfordshire used for importing aggregates, namely at Banbury, Kidlington and Sutton Courtenay, and these are safeguarded in the Oxfordshire Minerals and Waste Local Plan: Part 1 Core

Strategy. These depots import Crushed Rock aggregates from the South West (Somerset) and the East Midlands (Leicestershire). There is planning permission for a further railhead aggregate depot at Shipton on Cherwell, but this has not yet been developed. There is also a depot at Hinksey Sidings, Oxford but this is used solely by the rail industry to bring in rail ballast for internal use on the rail network; it is currently operational but its use for the transshipment of rail ballast has been intermittent in the past.

- 3.40 Figures for imports of Crushed Rock by rail collected by Oxfordshire County Council are only available from 2007 onwards. Prior to that year only the regional totals were available.
- 3.41 In 2022, there were no returns from operators on sales from Rail Depots. Therefore, we are unable to report on sales for 2022.
- 3.42 However, to a number of planning decisions in 2021, Oxfordshire's rail depot capacity increased to over 3.5million tonnes.
- 3.43 It is known that the increased capacity at Hennef Way Banbury is temporary for 5 years to provide material for HS2, and Appleford Sidings has added two more rail sidings. This site now has a condition limiting it to 1.5million tonnes per annum.
- 3.44 In addition in 2021, an application was made by Hanson for their aggregates depot at Kidlington site, to change the working hours to allow more trains to be unloaded (21/02817/F). Currently 12 trains a week (maximum) are able to access the site. However, that application states that due to an increased operational demand associated with HS2 construction there a need to increase the amount of trains able to access the site, and consequently the operational hours need to be varied to ensure sufficient unloading time. The application proposes to allow a maximum of 18 trains a week. Thereby enabling an increase of 50% additional material arriving at the site. This application has yet to be determined
- 3.45 Due to this demand for additional capacity, it can be considered that sales remain significant through Rail Depots in Oxfordshire.

#### Historic Rail Depot Sales

- 3.46 The rail depot figures prior to 2022 are confidential because they were derived from returns for only two companies. The figures for 2020 incorporated imports by rail from Somerset, Leicestershire and elsewhere, but also included significant quantities (from South Wales, South Gloucestershire and Kent) that were delivered to the rail depots by road; this distorted the true picture for rail transportation. It at least provides quantification of those road imports. The figures do not include imports of Crushed Rock to Hinksey Sidings, Oxford, which were brought in by rail and despatched by rail for use as rail ballast on the rail network (over a wider area than just Oxfordshire).

3.47 Although the raw data is confidential, in 2020 it was possible to report the variations over time (from 2007 onwards) in overall sales from the rail depots from the two reporting companies. Table 3.5 below, expresses the annual sales from rail depots for 2007 to 2020 as proportions of the sales figure for 2007.

2007	2008	2009	2010	2011	2012	2013	2014	2015	2016	2017	2018	2019	2020
1.0	1.1	0.7	0.9	1.2	1.0	1.0	2.4	2.2	2.4	2.5	2.5	No return	2

**Table 3.5: Pattern of sales from Oxfordshire rail depots 2007-2020 (Source: Oxfordshire County Council Aggregates Monitoring Survey)**

3.48 Table 3.5 shows that the figures vary from one year to another but that up to 2013 the fluctuation was less marked than those for sales of sand & gravel. Since 2013, the situation has changed, with annual rail imports for 2014 to 2018 being consistently around two and a half times that imported in 2007. However, this dropped to around 2 times in 2020. This could be due to Covid and lockdown and will need to be reviewed in the 2021 LAA

3.49 The combined sales from the three railhead depots that were operational in 2020 represented 74% of the total throughput permitted capacity of these three depots at this time, indicating that there was currently little headroom for further increase in imports of Crushed Rock by rail.

3.50 There is now significantly more capacity at two of the sites within Oxfordshire therefore it could be considered that sales will have also significantly increased.

### Consumption

3.51 In 2019 the BGS survey undertook the Aggregates Survey and their findings set out imports and exports of minerals between Mineral Planning Authorities which are explored in detail in Chapter 6. This sets out how much mineral Oxfordshire imports and how much we export.

3.52 The final report also sets out how much Oxfordshire Land Won Aggregate Oxfordshire consumed in 2019, which is an indicator of the quantity of each mineral type Oxfordshire requires. Sharp Sand and Gravel and Soft Sand are combined within the BGS Survey.

3.53 The full summary is shown in Appendix 2. The consumption figures have been summarised in Table 3.6. This also includes the information for the comparative years of 2009 and 2014.

	Sand and Crushed Rock 2009	All Oxfordshire	Sand and Crushed Rock 2009	All Oxfordshire	Sand and Crushed Rock 2019	All Oxfordshire

	Gravel 2009		Aggregate 2009	Gravel 2014		Aggregate 2014	Gravel 2019		Aggregate 2019
<b>Total Consumed within Oxfordshire (Mt)</b>	0.757	0.625	1.383	0.765	1.501	2.266	<b>0.900</b>	<b>0.617</b>	<b>1.517</b>

**Table 3.6: Mineral consumed within Oxfordshire, 2009, 2014 and 2019 (BGS Surveys)**

- 3.54 The table shows that in 2019, Oxfordshire consumed 0.900mt of sand and gravel, an increase of 17.5% from 2014, and an increase of 18.9% on 2009.
- 3.55 For crushed rock, Oxfordshire consumed 0.617mt in 2019. This is a decrease of 58.5% from 2014, and a decrease of 1.3% on 2009.
- 3.56 It should be noted that for some minerals within the survey it is not clear where they were consumed. These minerals are identified as sold within the South East or Unallocated. The consumption rates within Oxfordshire do not include any of the quantities from these two categories.

## 4. Factors affecting demand

- 4.1 Although 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.
- 4.2 We need to consider whether or not the historical 10-year average for land-won primary aggregate production can be relied upon as a guide to future levels of provision, or whether this needs to be changed in order to reflect other factors which may influence either the supply (availability) and/or the demand for aggregates produced within Oxfordshire, in future year.

### The Economy and Growth

- 4.3 In considering Economic growth on the supply and demand of aggregates, several national forecasts have been considered. To consider economic forecasts this section considers Gross Domestic Product (GDP) along with construction rates.
- 4.4 The Gross Domestic Product (GDP) is only available at UK level, but it does provide a background indicator as to the relative changes in economic activity likely to be experienced in Oxfordshire over time. Table 4.1<sup>6</sup> below shows the annual GDP year on year growth for the UK as a whole for the 10-year baseline period. The average rate of growth in the UK over the period 2013 to 2022 is 1.6%.

2013	2014	2015	2016	2017	2018	2019	2020	2021	2022
1.8%	3.2%	2.4%	2.2%	2.4%	1.7%	1.6%	-11%	7.6%	4.1%

**Table 4.1: Changes in UK Real GDP over the baseline period (ONS)<sup>9</sup>**

- 4.5 The growth forecasts are set out in Table 4.2 below from the Office of Budget as at March 2023<sup>7</sup>. These have altered significantly from earlier years estimates due to the impact of Covid in 2020/21 along with the invasion of Ukraine, energy price rises and rising inflation.

<sup>6</sup> [Gross Domestic Product: Year on Year growth: CVMSA % - Office for National Statistics \(ons.gov.uk\)](https://www.ons.gov.uk/economy/grossdomesticproduct/gdp/annual/grossdomesticproductyearonyeargrowth)

<sup>7</sup> [Economic and fiscal outlook - March 2023 \(obr.uk\)](https://www.obr.gov.uk/economic-and-fiscal-outlook-march-2023)

	2021	2022	2023	2024	2025	2026	2027	2027 - 2030	2021-2027 average
UK	7.6%	4.0%	-0.2%	1.8%	2.5%	2.1%	1.9%	Not yet forecast	2.81%

**Table 4.2: Growth Forecasts**

4.6 There are also more recent assumptions for GDP Growth<sup>8</sup> which is taken from a range of independent predictions. 2023 as 0.2% and 2024 as 0.7% compared with the prediction of 1.3% for 2023 in 2022<sup>9</sup> so overall less growth than anticipated.

4.7 In addition, inflation could be considered, as an increase in inflation rates within the UK, will also raise costs for raw materials, energy and labour. This could impact the minerals sector.<sup>10</sup>

2013	2014	2015	2016	2017	2018	2019	2020	2021	2022
2.29	1.45	0.37	1.01	2.56	2.29	1.74	0.99	2.52	7.922

4.8 The Regional overview of construction and mineral products markets in Great Britain (2023)<sup>11</sup> states that the Construction Products Association forecast around a 5% decline in construction in 2023 with limited growth after. According to the report, private housing, which is a key driver of mineral products demand, is expected to see back-to-back falls of 11% in 2023 and 1% in 2024.

4.9 The Report does state that the construction outlook in the South East will rise around 3.6% per annum in 2023-2027, due to private housing growth, however this includes large developments in Sussex and work in Ebbsfleet Garden City. The report does not go down to Authority level.

4.10 It would be beneficial if consideration could be given to any indicators of more local economic growth. Unfortunately, no quantitative information is available on this, though Oxfordshire does have a growth agenda, as set out in the 2016 Oxfordshire Strategic Economic Plan and in the Oxfordshire Growth Board's Oxfordshire Infrastructure Strategy (OXIS)<sup>12</sup>.

### *Economic Forecast Conclusion*

<sup>8</sup> [forecomp Jul.pdf \(publishing.service.gov.uk\)](#)

<sup>9</sup> [Forecomp May 2022\\_002 .pdf \(publishing.service.gov.uk\)](#)

<sup>10</sup> [U.K. Inflation Rate 1960-2023 | MacroTrends](#)

<sup>11</sup> [Regional overview of construction and mineral products markets in GB Spring 2023.pdf \(mineralproducts.org\)](#)

<sup>12</sup> [Infrastructure Strategy \(OxIS\) | OxLEP \(oxfordshirelep.com\)](#)

4.11 At this stage it could be considered that there is uncertainty in regards growth of the economy.

4.12 Future levels of economic growth could be less than previously anticipated and this could consequently result in reduced demand for construction aggregate in the future. This will be kept under close review in future LAA's.

#### Major Infrastructure Projects/Key Development

4.13 Major infrastructure projects, including those at the national scale, and key developments throughout Oxfordshire should be considered alongside housing and associated infrastructure development in terms of their likely influence on the future demand for construction aggregates.

4.14 Oxfordshire's Local Industrial Strategy<sup>13</sup> 2020 highlights that the Infrastructure projects within Oxfordshire that are critical to the Investment Plan total £1,117.5million. The OXIS<sup>14</sup> identifies a range of infrastructure development required to support population and housing growth.

4.15 Across Oxfordshire these include

- West Oxfordshire A40 strategies
- Various highways improvements throughout Oxfordshire
- The National Infrastructure Delivery Plan – For Oxfordshire projects such as HS2.
- Oxfordshire Housing and Growth Deal<sup>15</sup>: Provides £60m for affordable housing and £150m for infrastructure improvements, including road and rail. Supports the ambition of building 100,000 new homes across Oxfordshire between 2011 and 2031 to address the county's severe housing shortage and expected economic growth.
- The Oxford-Cambridge Arc.
- The National Infrastructure Commission – East West Rail Project (though most of the work is outside the County)
- Oxfordshire Knowledge Spine, which includes Science Vale Oxford<sup>16</sup>, Bicester and Oxford<sup>17</sup>.
- Science Vale area: It is the largest concentration of research and development in Europe: 20,000 new jobs and around 20,000 new homes.
- Considerable growth in Bicester.

4.16 It is difficult to assess the overall impact of these infrastructure and major development proposals, in terms of their demand for construction aggregates. Some projects that were previously mentioned such as the Harwell Satellite

---

<sup>13</sup> [The Oxfordshire Investment Plan - August 2020.pdf \(oxfordshirelep.com\)](#)

<sup>14</sup> [Infrastructure Strategy \(OXIS\) | OxLEP \(oxfordshirelep.com\)](#)

<sup>15</sup> <https://www.gov.uk/government/publications/oxfordshire-housing-deal>

<sup>16</sup> A global hot spot for enterprise and innovation in science, high technology and the application of knowledge - <http://www.sciencevale.com/>

<sup>17</sup> Oxfordshire LEP (2014) Strategic Economic Plan: Driving Economic Growth Through Innovation.

Test Centre have now been built, whilst others such as HS2, East West Rail and growth within Bicester and the south of the County are currently underway, with a few yet to commence.

#### *Major Infrastructure Projects/Key Development Conclusion*

- 4.17 Whilst it is difficult to quantify, evidence suggests that planned infrastructure and major development both within and outside the County will continue. Demand on minerals is therefore expected to be maintained whilst these continue.

#### Population and Housing Growth

- 4.18 In considering the future projections we also need to consider population growth and local authority housing forecasts.
- 4.19 OXIS<sup>18</sup> (2017) forecasts that in the period 2016-2040, 123,500 additional homes will be built in Oxfordshire, the equivalent of 5,100 homes being built per year; and that population will increase by 39% from 688,000 to approximately 956,000.
- 4.20 Adopted Local Plans in the Oxfordshire indicate the major sites for new homes
- Cherwell – concentrated around Bicester, Banbury and the former RAF site at Upper Heyford, plus growth around Begbroke, Kidlington and Yarnton to meet Oxford's unmet need.
  - Oxford City – concentrated at Barton Park, Northern Gateway and Oxpens.
  - South Oxfordshire – concentrated around Chalgrove Airfield and the Didcot Garden Town in conjunction with Vale of White Horse, with further strategic land at the edge of Oxford
  - Vale of White Horse – concentrated around the Didcot Garden Town, Wantage and Abingdon (the Science Vale)
  - West Oxfordshire - concentrated at Cotswold Garden Village Eynsham, North Witney and Chipping Norton.
- 4.21 Population figures are published by the Office of National Statistics<sup>19</sup>(ONS) There has been a steady population increase between 2011 and 2020.
- 4.22 In the Census in 2021, the population of England and Wales grew by more than 3.5million (6.3%) since 2011<sup>20</sup>.
- 4.23 Unlike aggregate sales there was not a dip in population at the start of the baseline period, at least not at a county level, or on the scale associated with year-on-year variations. It is hard to draw a correlation between population figures and aggregate demand.

---

<sup>18</sup> [Infrastructure Strategy \(OXIS\) | OxLEP \(oxfordshirelep.com\)](#)

<sup>19</sup> [www.ons.gov.uk/peoplepopulationandcommunity/populationandmigration/populationestimates/](http://www.ons.gov.uk/peoplepopulationandcommunity/populationandmigration/populationestimates/)

<sup>20</sup> [Population and household estimates, England and Wales - Office for National Statistics \(ons.gov.uk\)](https://www.ons.gov.uk/peoplepopulationandcommunity/populationandmigration/populationestimates/populationandhouseholdestimates)



Over the 10-year period to 2021 there was an overall growth in the population of Oxfordshire of 71,739 people (+11%) (an average of 1.1% per year). However these may get updated as the Government review the census data.

- 4.24 Looking to the future, Oxfordshire County Council population forecasts (2022) predict a total population in Oxfordshire of 817,349 by 2030<sup>21</sup>. Whereas the ONS have population forecast of 725,092 by 2030. (Appendix 4).
- 4.25 Whilst there is no statistical justification for assuming that rates of population growth will correlate with changes in demand for aggregates, they do at least provide a mechanism for looking further ahead than the current economic forecasts. They suggest that there will be continued pressure for new housing and associated infrastructure development which is likely to be reflected in an increase in the demand for construction aggregates.
- 4.26 This is echoed in the Oxfordshire Strategic Economic Plan which states that “Our vision is Oxfordshire as a vibrant, sustainable, inclusive, world leading economy, driven by innovation, enterprise and research excellence”; and also, that “Both activity and employment rates are higher than the regional average – and substantially higher than the national average”.
- 4.27 This can be examined further by considering data on rates of house construction (Appendix 4).
- 4.28 Using the Government figures for completed new builds <sup>22</sup>For the 10-year baseline period (2012-2022) the average housing completion rate in Oxfordshire was 3515 homes, which was up 10.7% from 3140 homes per year (2011-2021)<sup>23</sup>
- 4.29 However, if we took the last 3 years average from the same data, as a baseline period (2020-2022), the housing completion rate in Oxfordshire is 4614 which is a 7% decrease on the previous 3-year baseline of 4934 homes (2019-2021). With Covid in 2020 and the associated lockdowns this slight decrease could be expected as builds were held up in 2020.
- 4.30 Looking forward, the projections for housing growth can be seen in Appendix 4. The average over the 10-year period equates to around 6, 238 homes per annum. Whilst there is uncertainty in Oxfordshire about the deliverability of these figures, it would suggest a continued trend in the associated demand for construction aggregates.
- 4.31 In March 2018, the six Oxfordshire authorities signed the Oxfordshire Housing and Growth Deal. It committed the authorities to collectively delivering 100,000 homes and infrastructure across the county between 2011 and 2031.

### *Population and Housing Growth Conclusion*

---

<sup>21</sup> [insight.oxfordshire.gov.uk/cms/future-population](https://insight.oxfordshire.gov.uk/cms/future-population)

<sup>22</sup> [Live tables on dwelling stock \(including vacants\) - GOV.UK \(www.gov.uk\)](https://www.gov.uk) Table 100

<sup>23</sup> Oxfordshire County Council.

- 4.32 It is clear that we need to continue consider the implications of population and housing growth on the minerals provision over the plan period.

#### Conclusion

- 4.33 The evidence available suggests that Economic Growth, Major Infrastructure Projects/Key Development and Population Growth and Housing within Oxfordshire will continue at a similar pace in the foreseeable future. The impact of inflation and the energy crisis will continue to be explored in future LAA's.

## 5. Aggregate Provision Rates

5.1 The NPPF<sup>24</sup> states that the Minerals Planning Authorities should plan for a steady and adequate supply of aggregates. One of the ways to do this is to prepare an annual Local Aggregate Assessment to forecast future demand, based upon a rolling average of 10 years sales data and any other relevant local information. To forecast and ensure that supply continues to meet demand, the Aggregates Provision Rate (APR) for each aggregate is set within the annual Local Aggregate Assessment.

### Sharp Sand and Gravel Aggregate Provision Rate

5.2 The current LAA APR is 1.015mtpa, which was originally established in the 2014 LAA and included within the adopted Core Strategy (2017) following Examination. Previous Local Aggregate Assessments have seen no justification to change this figure, as growth in Oxfordshire saw demand continue to rise and looked likely to continue.

5.3 However, sales of Sharp Sand and Gravel decreased in 2022 to 0.972mt. This is a 16% decrease on 2021 sales of 1.157mt, and lower than the current 1.015mtpa APR.

5.4 Demand has only reached the current LAA APR of 1.015mtpa once since 2006 and this was an unusual year following the previous years lockdowns following COVID, where sales exceeded 1.157mt following the low of 0.83mt in 2020.

5.5 The 10 year sales average increased 5.5% (from 0.750 mtpa to 0.791mtpa) and the 3-year sales average (0.986mtpa) decreased by 0.8% compared to the previous 3-year sales average (0.994mtpa). The 3-year sales average remains higher than the 10-year average. These are both below the current APR of 1.015mtpa.

5.6 2022 saw a reduction in demand and the construction industry are now anticipating a decline in construction followed by limited growth after. In addition other studies suggesting less economic growth than previously anticipated.

5.7 Our 10 year rolling average for sales data is 0.791mtpa, however as set out within Section 3 Demand, the start of the 10 year baseline period for sand and gravel included the end of the recession, followed by a number of sand and gravel sites waiting for permission. Since 2018 demand has continued to be significantly higher than the 10 year average. So the 10 year rolling average may not be the most appropriate APR for planning “a steady and adequate supply of mineral” at this stage.

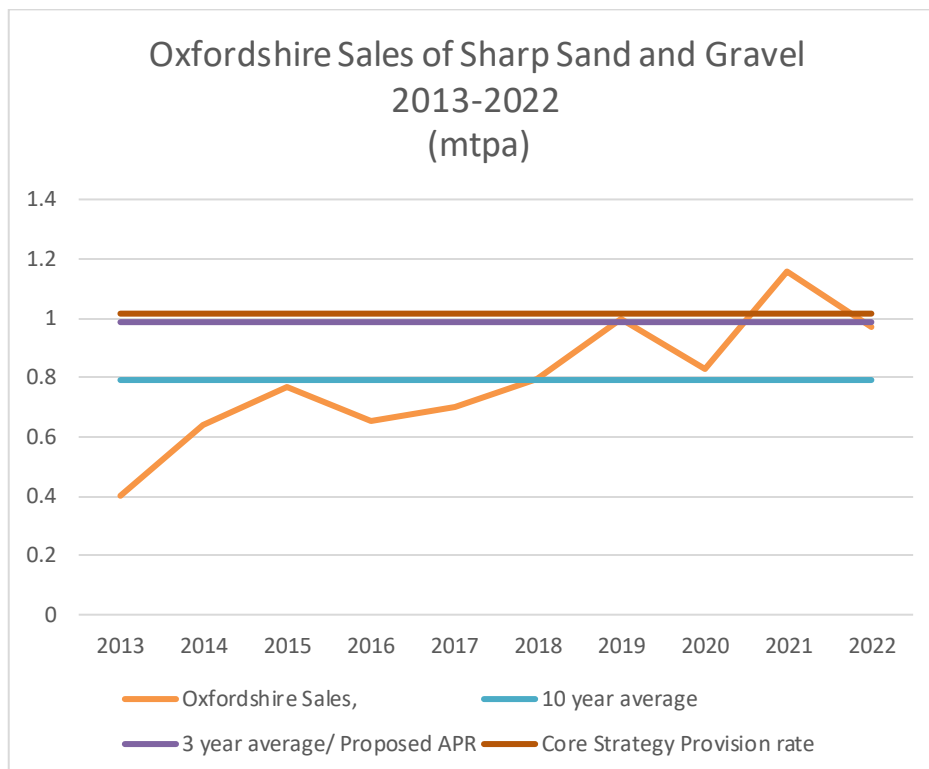
---

<sup>24</sup> [National Planning Policy Framework \(publishing.service.gov.uk\)](https://www.gov.uk/government/policies/national-planning-policy-framework)

5.8 In light of the all the factors considered, including current sales, Oxfordshire’s consumption and exports, and all other evidence, rather than using the 10 year average, it is recommended that the Aggregates Provision Rate be based on the 3 year average of 0.986mtpa.

5.9 Figure 5.1 Actual Sharp Sand and Gravel sales compared with the average sales (mtpa), the 3 year Average/ Proposed Aggregates Provision Rate and the Core Strategy Provision rate.

**Figure 5.1 Comparison of actual sharp sand and gravel sales compared with the average sales and the proposed LAA Aggregates Provision Rate (APR) and Core Strategy Provision levels (mtpa).**



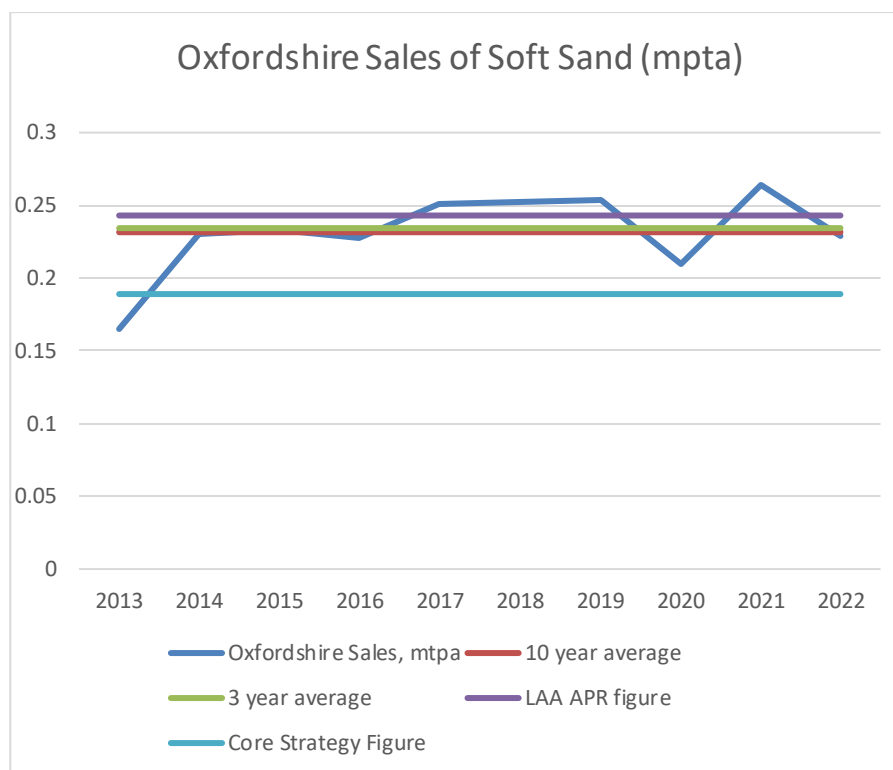
### Soft Sand

5.10 For soft sand, the Core Strategy includes a provision figure of 0.189mtpa, which was set in the LAA 2014 on the basis of the 10-year sales average at that time.

5.11 In 2018 there had been 5 years (2014 – 2018) of sales of Soft Sand consistently at levels significantly above pre-2014 sales levels and above the LAA figure. This 5-year period of sales at a consistently higher level which, when considered alongside other relevant information, was sufficient for it to be concluded that this reflected an increased level of demand for Soft Sand that is likely to continue for the foreseeable future. It was therefore considered appropriate to increase the LAA Aggregates Provision Rate for Soft Sand to the 2016-2019 3-year sales average of 0.243mtpa within the LAA2019.

- 5.12 Sales in 2022 decreased from 0.264mt in 2021 to 0.229mt in 2021, a 13% decrease. The 3-year sales average (0.234mtpa) saw a 3.5% decrease compared with the previous 3-year sales average (0.243mtpa), though there was a 3.5% increase in the 10-year sales average (from 0.224mtpa to 0.232mtpa). The 3-year sales average is 0.9% higher than the 10-year sales average.
- 5.13 Taking into account sales and Oxfordshire’s consumption and exports alongside all the evidence, at this time there is no justification for a change in the Aggregates Provision Rate for Soft Sand from the current level of 0.243mtpa.

**Figure 5.2 Comparison of actual Soft Sand sales compared with the average sales and the LAA APR and Core Strategy Provision levels (mtpa).**



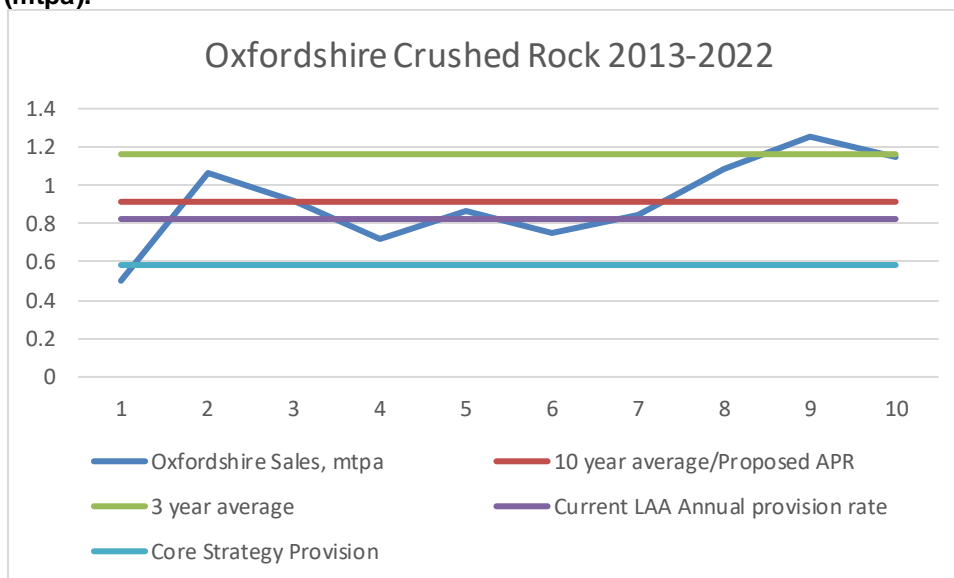
### Crushed Rock

- 5.14 In the case of crushed rock, the Core Strategy provision level figure of 0.584mtpa was set in the LAA 2014 on the basis of an upward adjustment of the 10-year sales average at that time.
- 5.15 In 2018, there had been 5 years (2014 – 2018) of sales of Crushed Rock consistently at levels significantly above pre-2014 sales levels and above the LAA2014 figure. This 5-year period of sales at a consistently higher level which, when considered alongside other relevant information, was sufficient for it to be considered that an increased level of demand for Crushed Rock

that is likely to continue for the foreseeable future, see Figure 4.3. Therefore, it was appropriate to increase the LAA Aggregates Provision Rate for Crushed Rock to the 2016-2019 3-year sales average of 0.778mtpa.

- 5.16 In 2021, the LAA APR rate was increased to the 10 year average of 0.824mtpa, based on demand and other relevant information.
- 5.17 Though sales in 2022 saw a 8.6% decrease to 1.146mt compared to 1.254mt in 2021, sales are still higher than any pre 2021 year. The 3-year sales average (1.162mtpa) was 9.6% higher the previous 3-year sales average (1.061mtpa) over the baseline period and there was a 12.3% increase in the 10-year sales average (from 0.824mtpa to 0.914mtpa). The 3-year and 10-year sales average remain higher than the current LAA 2021 APR of 0.824mtpa.
- 5.18 The current APR is not near demand, and sales have been above 0.824mtpa since 2019. Available evidence, especially in terms of infrastructure project demand, indicates that demand is likely to continue.
- 5.19 Therefore, alongside this evidence, taking into account sales, Oxfordshire’s consumption and exports, it is considered that at this time, there is justification for a change in the Aggregates Provision Rate to the 10-year sales average.
- 5.20 The Aggregates Provision Rate will therefore be increased to the 10-year average of 0.826mtpa.

**Figure 5.3 Comparison of actual Crushed Rock sales compared with the Aggregates Provision Rate/10 year average, 3 year average and Core Strategy Provision levels (mtpa).**



- 5.21 In addition to setting provision level figures for local land-won aggregates, the LAA should also include provision levels for other relevant sources of aggregates supply to ensure that future demands are met. In the case of Oxfordshire these are recycled and secondary aggregates and aggregate rail depots.
- 5.22 In the case of recycled and secondary aggregates, the appropriate figure to maintain in this LAA is the provision rate set in the Oxfordshire Minerals & Waste Local Plan: Part 1 – Core Strategy (2017) policy M3. This is 0.926mtpa.
- 5.23 In the case of aggregate rail depots, due to confidentiality, we are unable to provide a LAA provision figure at this stage.

Conclusion for LAA provision figures

<b>Sharp Sand and Gravel</b>	<b>0.986mtpa</b>	<b>Changed from 2021</b>
<b>Soft Sand</b>	<b>0.243mtpa</b>	<b>Unchanged from 2021</b>
<b>Crushed Rock</b>	<b>0.914mtpa</b>	<b>Changed from 2021</b>
<b>Recycles and Secondary Aggregate</b>	<b>0.926mtpa</b>	<b>Unchanged from 2021</b>

## 6. Supply

### Oxfordshire Supply

- 6.1 Oxfordshire is rich in mineral resources. Those which are used for primary aggregate production comprise: extensive alluvial sand and gravel resources along the River Thames and its tributaries; smaller deposits of glacio-fluvial sand and gravels in the north east of the county; deposits of Soft Sand mainly in the south west; and extensive areas of limestone in the north west and of ironstone in the north.
- 6.2 Oxfordshire also produces some secondary aggregates and a wide range of recycled aggregate materials. Further detailed information of the geological resources of Oxfordshire can be found in the LAA2014 (LUC and Cuesta Consulting Limited).

### Recycled and Secondary Aggregate

- 6.3 Although reasonable data on recycling capacity is available for Oxfordshire, and whilst that may be indicative of increasing production and sophistication, there is only partial information on the actual levels of production and use of these materials.
- 6.4 Past aggregates monitoring surveys, for example, have not produced a full response from secondary and recycled aggregates site operators. This is a recognised issue across the South East, and to try and ensure a more accurate picture of the sales of recycled aggregates, it was decided by the South East Aggregates Working Party that Authorities could use the Environment Agency's Waste Data Interrogator (WDI) to estimate material recycled, if returns were insufficient.
- 6.5 Where returns are provided by operators these are used, and where they are not, a 50% average of material received into a CDE recycling site is taken from the WDI.
- 6.6 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.
- 6.7 For Secondary Aggregate sites, an estimate is made using averages from previous returns. The most recent data available is for 2021 which recorded sales in Recycled and Secondary Aggregate, of 0.416mt.
- 6.8 The actual capacity figures were likely to be significantly higher than the recorded figures.



- 6.9 Table 6.1 below presents a fuller picture, showing the estimated<sup>25</sup> capacity for the production of recycled and secondary aggregates at each site at the end of 2022, sub-divided between operational and non-operational sites.
- 6.10 Of a total capacity of approximately 1.503mtpa: 1.468mtpa is at operational facilities and 0.035mtpa is currently non-operational. Of the operational capacity, that which is at sites with planning permission to the end of the plan period (2031) or beyond is 1.031mtpa, whereas the capacity of sites with permissions that expire before the end of 2031 is 0.250mtpa.
- 6.11 In addition, at the end of 2022 there were two applications outstanding. One at Dix Pit (MW.0059/19) for an additional 0.040tpa until 2028, and one at Finmere (MW.0031/19) for 0.038mtpa of recycled aggregate. An additional 0.078mtpa of recycling capacity.

Facility Name	Operator	Planning Life	Production Capacity (tpa)
<b>Operational Recycled Aggregate Production Facilities with Permanent consent or Time Limited Consent to end of Plan Period (2031)</b>			
Drayton	Oxfordshire Highways	Permanent	75000
Ferris Hill Farm	Banbury Plant and Skip Hire (incorporating NL Matthews)	Permanent	24999
Grove Industrial Park	Aasvogel	Permanent	40000
Hundridge Farm	G.D. Parker Instant Skip Hire	Permanent	5000
Lakeside Industrial Park	Micks Skips and Recycling Ltd.	Permanent	2000
New Barn Farm	Grundon	2037	10000
New Wintles Farm	O Malley Haulage	Permanent	170000
Newlands Farm	Smiths of Bloxham	Permanent	32000
Playhatch Quarry	Grabloader Ltd.	Permanent	70000
Rear of CemexBatching Plant (Hardwick)	Fergal Contracting	Permanent	20000
Rumbolds Pit	Richard Hazel (Hazel & Jefferies)	Permanent	20000
Sandfields Farm	K J Millard Ltd.	Permanent	12000
Shipton Hill	Hickman Bros	Permanent	12600

<sup>25</sup> Taken from Survey responses, Planning Decisions and Planning Application Statements.

Stonepitt Barn	SCB Oxford Ltd	Permanent	75000
Worton Farm (Cresswell Field)	M&M Skip Hire	Permanent	60000
Swannybrook	NAP Grabhire	Permanent	80280
Chilton Waste Transfer Site/Prospect Farm	Raymond Brown Minerals and Recycling Ltd.	2022	75000
Gill Mill	Smith and Sons (Bletchington) Ltd.	2040	175000
Ewelme No. 2	Grundon Waste Management	2032	12000
Shellingford Quarry	Earthline Ltd.	2044	60000
<b>Total Operational Production Capacity at Recycled Aggregate Production Facilities available through the Plan Period.</b>			<b>1,030,879</b>

<b>Operational Recycled Aggregate Facilities with Time-Limited Consent ending before end of Plan Period (2031)</b>			
Dix Pit Complex	Sheehan's	2028	175000
Shipton Quarry	Earthline Ltd.	2025	75000
<b>Total Operation Production Capacity at Recycled Aggregate Facilities with Time limited consent ending before end of Plan Period (2031)</b>			<b>250,000</b>

Facility Name	Operator	Planning Life	Production Capacity (tpa)
<b>Operational Secondary Aggregate Facilities with Permanent or Time-Limited Consent to end of Plan Period (2031)</b>			
Ardley ERF (IBAA) Facility	Fortis	2049	75000
<b>Operational Secondary Aggregate Facilities with Time Limited Consent ending before end of Plan Period (2031)</b>			
Sutton Courtenay Block Recycling	Hanson (reject building blocks & Concrete used in block making)	2030	62500

Sutton Courtenay Asphalt Recycling Plant	Hanson	2030	50000
<b>Total Operational Secondary Aggregate Capacity</b>			<b>187,500</b>

<b>Overall Total Operational Capacity at 'Permanent' Facilities (facilities available throughout the Plan Period)</b>	<b>1,105,879</b>
<b>Overall Total Operational Capacity at Time Limited Facilities (facilities with consent ending before end of 2031)</b>	<b>362,500</b>
<b>Overall Total Operational Capacity</b>	<b>1,468,379</b>

#### Non Operational Facilities

<b>Facility Name</b>	<b>Operator</b>	<b>Planning Life</b>	<b>Production Capacity (tpa)</b>
Upwood Quarry	Hills Quarry Products Ltd.	2029	15000
NW Corner of TW Depot	Clancy Docwra	Permanent	20000
<b>Total Non Operational Capacity</b>			<b>35000</b>

#### Operational and Non-Operational Facilities

<b>Total Operational and Non-Operational Capacity 2021 (tpa)</b>	<b>1,503,379</b>
--	------------------

Table 6.1 Recycled and Secondary Aggregates Permissions at end of 2022

## Imports and Exports

- 6.12 Every county in the UK has to import aggregates from elsewhere because the geology means that no single county area produces exactly the profile of different types of aggregate in the exact amounts or proportions consumed therein. As part of the Local Aggregate Assessment, we should consider demand and supply factors from other MPAs.
- 6.13 All sales of aggregate are the result of commercial decisions by both buyers and sellers and the resulting movements reflect the relative locations of supply and demand. Where these movements cross a county boundary, they are tracked in the four (or five) yearly national aggregates monitoring surveys (AM Survey), these have been 2005, 2009, 2014 and most recently 2019. This survey is known as AM2019.
- 6.14 The 2019 Aggregates Minerals Survey for England and Wales was published in August 2021. The figures within this Imports and Exports section of the LAA 2020 were taken from the AM2019 which shows movement of minerals at a sub-regional and Minerals Planning Authority level. These are set out in detail in Appendix 2.
- 6.15 The most recent AM2019 stated that overall Sand and Gravel sales in England have decreased by 4% between 2014 and 2019, whilst Crushed Rock sales increased 18% between 2014 and 2019.
- 6.16 Oxfordshire however, has increased in Land won Sand and Gravel sales by 44% since 2014, though sales in Crushed Rock have decreased by 20%.
- 6.17 Total primary aggregate sales within Oxfordshire have increased by 8% since 2014, however the South East as a whole has seen an overall decrease of 7% in total primary aggregate sales.
- 6.18 Some neighbouring MPAs have limited resources of their own. These authorities therefore rely on Oxfordshire to supply some of their needs. Other MPAs have traditionally supplied aggregates into Oxfordshire, Somerset, South Gloucestershire and Leicestershire have previously provided Crushed Rock to supplement the County's own production and to cater for higher specification requirements from harder rock resources
- 6.19 The AM2019 sets out the sales of primary aggregates by MPA and principal destination sub region in 2019. These findings are shown in Table 6.2. As the table shows Oxfordshire were responsible for 20% of the South East Regions Land Won Sand and Gravel Sales and 42% of the Crushed Rock sales in 2019. This does not include that mineral that was unallocated or went elsewhere. They are also set out in Appendix 2.

(thousand tonnes)

Destination	Land won sand and gravel	MPA%	AWP%	Crushed Rock	MPA	AWP%
Oxfordshire	772	62%		260	31%	
South East	369	30% <sup>26</sup>		404	48%	
Elsewhere	43	3%		178	21%	
Unallocated	64	5%				
	1248	100%	20%	843	100%	42%

**Table 6.2 Sales of primary aggregates and principal sub regions 2019 (Exports)**

6.20 The AM2019 also sets out Oxfordshire's imports in 2019. A summary of the import findings is shown in Table 6.3. The table also shows as a percentage, of the South East total, Oxfordshire's imports.

(thousand tonnes)

Total Imports	Land won Sand and Gravel	Marine Sand and Gravel	Total Sand and Gravel	Crushed Rock	Total Primary Aggregate
Oxfordshire	128	7	136	356	491 <sup>27</sup>
South East Total	2268(6%)	1962(0.3%)	3950(3%)	58084 (0.6%)	9754(5%)

**Table 6.3 Imports of primary aggregates and its relationship with the South East Imports Total**

6.21 The AM Survey 2019 (Tables 6.2, 6.3 and Appendix 2) shows that Oxfordshire is now a net exporter of both Land won Sand and Gravel and Crushed Rock.

#### Sharp Sand and Gravel

6.22 The AM2019 does not differentiate between Soft Sand and Sharp Sand and Gravel. They are combined into Land won Sand and Gravel.

6.23 Comparison of the AM2009, AM2014 and AM2019 results show that Oxfordshire continues to be a net exporter of sand and gravel since 2014.

#### Exports

6.24 Exports have significantly increased since 2009. From 140,000 in 2009, doubling to 221,000 tonnes in 2014, and in 2019 doubling again to 476,000 tonnes.

<sup>26</sup> 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%

<sup>27</sup> This should be 492 as 136 add 356 is not 491

6.25 Oxfordshire consumed 62% of the sand and gravel produced in the County. Exports make up approximately 38%<sup>28</sup> of Oxfordshire's total sand and gravel sales. The majority of exports were within the South East (30%) whilst 3% went elsewhere and 5% was unallocated on the Survey returns. There is the potential for some of this to have been used in Oxfordshire.

6.26 As set out in Appendix 2 the figures from the AM2019 show that Hampshire and the Isle of Wight were one of the main Authorities that Oxfordshire exported Sand and Gravel to, along with, Buckinghamshire & Milton Keynes. Hampshire and Isle of Wights imports from Oxfordshire made up between 10 and 20% of their own total sand and gravel consumption.

#### Imports

6.27 Whilst we exported 476,000 tonnes of Land won Sand and Gravel, Oxfordshire imported 128,000 tonnes, up slightly from 117,000 tonnes in 2014. This was mainly from Cambridgeshire, Lincolnshire, Staffordshire and Wiltshire as Oxfordshire imported between 1% and 10% of the total consumed from each of these Authorities.

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

#### Crushed Rock

#### Exports

6.29 Appendix 2 shows that Oxfordshire changed from a net importer of Crushed Rock in 2014 to a net exporter. Oxfordshire exported 0.582mt of its total 0.843mt of Crushed Rock in 2019, compared with importing 0.356mt from outside the County. This is a change from 2014 where OCC was a net importer. 0.440mt was imported, compared 0.347mt exported.

6.30 Table 6.3 shows that exports make up approximately 69% of Oxfordshire's total sales. The majority of exports were to destinations within the South East (48%) whilst 21% went elsewhere.

6.31 As set out in Appendix 2 the figures from the AM2019 show that Northamptonshire was one of the main Authorities that Oxfordshire exported Crushed Rock to, along with, Buckinghamshire & Milton Keynes. Warwickshire and Berkshire. Imports of Crushed Rock from Oxfordshire made up between 1 and 20% of their own total Crushed Rock consumption.

6.32 Imports and in particular exports, in light of the quantity of minerals exported in 2019 will therefore need to be given great consideration in planning for future provision.

---

<sup>28</sup> The figures include the 5% that was unallocated and some of these sales may have stayed within Oxfordshire.

6.33 These shall be monitored under Duty to Cooperate and, if necessary, Statements of Common Ground between Authorities will be entered into.

## 7.Quarries

### Sharp sand and gravel

- 7.1 On Oxfordshire, at the end of 2022, there are 12 sites with planning permission for Sharp Sand and Gravel extraction, 8 of which are active. 3 are inactive, 1 not yet commenced. No planning applications were determined in 2022.
- 7.2 There were two outstanding applications at the end of 2022, White Cross Farm in Wallingford for 550,000tonnes (MW.0115/21) and Oday Quarry Sutton Wick for 128,000tonnes (MW.0104/20). Information on permitted sites is summarised in Table 7.1, including the operator and a summary of the current status of each site.

Quarry Site	Operator	Current Status at December 2022
Cassington	Hanson Aggregates	Active in 2022. Operations ceased at end of 2022.
Caversham	Lafarge Tarmac	Active: extension of 1.86 million tonnes permitted August 2014; commenced August 2017.
Finmere	AT Contracting	Inactive: Intermittent small scale past working; reserve remaining.
Gill Mill, Ducklington	Smiths of Bletchington	Active: biggest quarry in county; extension of 5.0 million tonnes permitted June 2015; large reserve remaining.
Hatford	Earthline	Active: Permitted for SSG, SS and CR in 2021. 225,000tonnes of S&G
Stanton Harcourt (Stonehenge Farm)	Hanson Aggregates	Inactive: original quarry worked out; extension of 1.55 million tonnes permitted on appeal October 2010; permission commenced but reserve remains Permission for extraction ends Dec 2023.
Sutton Courtenay (Bridge Farm)	Hanson Aggregates	Inactive: Extension of 0.5 million tonnes permitted June 2018. Awaiting decision on extension of time.
Sutton Wick	H Tuckwell & Sons	Inactive: Application MW.0104/20 outstanding.
Thrupp Lane, Radley	H Tuckwell & Sons	Inactive: Estimated 0.925 million tonnes confirmed as a permitted reserve but under ROMP procedure has gone into suspension and cannot be worked until new conditions have been approved; therefore not currently included as part of permitted reserve or landbank. A ROMP application was received in 2023 and is awaiting determination.



Quarry Site	Operator	Current Status at December 2022
Faringdon Quarry	Grundon Sand & Gravel	Active: new quarry permitted June 2013 (formerly regarded as extension to Wicklesham Quarry). Extension to 2035 granted in 2022.
New Barn Farm, Cholsey	Grundon	Active: Permitted for 2.500,000tonnes in November 2018. Extraction commenced in 2020
Shellingford	Multi Agg Ltd	Active. Also has SS and CR deposits on site.

**Table 7.1 Active and Permitted Sharp Sand and Gravel Extraction Sites in Oxfordshire, including Operators and Current Status (Source: OCC)**

- 7.3 Total permitted reserves of Sharp Sand and Gravel in Oxfordshire at the end of 2022 were 9.607 mt, as shown in Table 7.2 below. This is taken from the AM2022 survey calculated using annual operator returns. The actual operator returns for individual quarries cannot be presented due to confidentiality.
- 7.4 Production capacity is also relevant, as a large amount of reserve in a quarry with only a low production rate will make a smaller contribution to annual supply than equivalent reserves in a high producing quarry. Production capacity at the end of 2022 was 1.701mtpa

Sharp Sand and Gravel Permitted Reserves at 31/12/22 (million tonnes)
9.607mt

**Table 7.2: Sharp Sand and Gravel Permitted Reserves at 31/12/22 (million tonnes)**

#### Soft Sand

- 7.5 In Oxfordshire, at the end of 2022, there were 8 sites with planning permission for Soft Sand extraction, with 1 currently inactive.No planning permissions were granted for soft sand sites in 2022.

Quarry Site	Operator	Current Status at December 2022
Bowling Green / Chinham Farm	Hills Quarry Products	Active: sand & limestone; extension of 1.6 million tonnes sand permitted June 2017; large remaining reserve.
Duns Tew	Smiths Bletchington	Active: extension of 0.415 million tonnes permitted June 2017 and this is anticipated to commence operation in 2019.
Hatford	Earthline Ltd	Active: sand & limestone. Application outstanding at end of 2019 for extension (MW.0066/19) Limestone 0.520mt, Sharp Sand 0.225mt tonnes, Soft Sand 0.130mt

Shellingford	Earthline Ltd	Active: sand & limestone; permissions granted April 2011 for deepening and eastern extension, total 1.05 million tonnes sand, requires extraction to end by 31.12.20 in eastern extension and 31.12.28 in existing quarry. Application granted at end of 2019 for 1.8mt of Soft Sand and 1mt of crushed rock.
Upwood	Hills Quarry Products	Active: sand & limestone; large remaining reserve.
Faringdon	Grundon Sand & Gravel	Active: sharp sand & gravel and soft sand; new quarry permitted June 2013 (replaced Wicklesham Quarry). Extension of time till 2035 granted
Finmere	AT Contracting	Intermittent small scale past working; reserve remaining. Application outstanding
Sutton Courtenay (Bridge Farm)	Hanson Aggregates	Inactive: fully operational after periods of mothballing and spasmodic working but production has fluctuated for operational reasons; extension of 0.5 million tonnes permitted June 2018. Awaiting decision on extension of time

**Table 7.3 Active and Permitted Soft Sand Extraction Sites in Oxfordshire, including Operators and Current Status**

7.6 Total permitted reserves of Soft Sand in Oxfordshire at the end of 2022 were 3.517mt, as shown in Table 7.4 below. This is taken from AM2022 survey, calculated using annual operator returns. The actual operator returns for individual quarries cannot be presented due to confidentiality.

7.7 However, total production capacity is also relevant, as a large amount of reserve in a quarry with only a low production rate will make smaller contribution to annual supply than equivalent reserves in a high producing quarry. The current reserves are spread across a number of operators rather than one main one and production capacity is 0.315mtpa.

<b>Soft Sand Permitted Reserves at 31/12/22(million tonnes)</b>
3.517 mt

**Table 7.4: Soft Sand Permitted Reserves at 31/12/22 (million tonnes)<sup>29</sup>**

<sup>29</sup> SEEA WP Aggregates Monitoring Survey 2022

## Crushed Rock

- 7.8 In Oxfordshire at the end of 2022, there are 15 sites with planning permission for Crushed Rock extraction. There are 12 active sites and 3 inactive. The operator and current status of each site is provided in Table 7.5.
- 7.9 One planning permission was granted in 2022 at Enstone (MW.100.21) for 150,000 tonnes, two thirds of which were to be used on the agricultural holding and the remaining exported.
- 7.10 There are also three applications for Crushed Rock outstanding at the end of 2022. Finmere Borrow Pit (MW.0048/20) which has since been withdrawn. MW.0157/22 Finmere Quarry and MW.0157/22 at Whitehill Quarry.

<b>Quarry Site</b>	<b>Operator</b>	<b>Current Status at December 2021</b>
Dewars Farm	Smiths Bletchington	Active; limestone
Burford	Smiths Bletchington	Active; limestone
Castle Barn (Sarsden Quarry)	Great Tew Partnership	Closed
Chinham Farm (Bowling Green)	Hills Quarry Products	Active; sand and limestone
Land at Quarry Farm North, Enstone	Great Tew Farms Partnership	Active; limestone
Duns Tew	Smiths Bletchington	Active; sand with small amounts of limestone
Faringdon Quarry	Grundon Sand and Gravel	Active; sand & gravel with small amounts of limestone
Hatford	Hatford Quarry Ltd (Earthline)	Active; sand and limestone.
Rollright Quarry Phase 1	Hanson Aggregates	Active; limestone. Limited production capacity by lorry movements
Rollright Quarry Phase 2	Smiths Bletchington	Inactive; limestone
Shellingford	Multi-Agg Ltd (Earthline)	Active; sand and limestone; Application granted in 2020 (MW.0104/18) for 1.8mt of Soft Sand and 1mt of crushed rock.

Quarry Site	Operator	Current Status at December 2021
Shipton on Cherwell	Earthline	Planning permission expired 30th September 2019. Appeal outstanding for extension to site MW.0046/18
Upwood	Hills Quarry Products	Active; sand and limestone
Whitehill	Smiths Bletchington	Active; limestone
Wroxton	Earthline	Active; ironstone

**Table 7.5 Active and Permitted Crushed Rock Extraction Sites in Oxfordshire, including Operators and Current Status**

- 7.11 Total permitted reserves of Crushed Rock in Oxfordshire at the end of 2022 were 6.193 mt, as shown in Table 7.6 below. This is taken from the AM2022 Survey, calculated using annual operator returns. The actual operator returns for individual quarries cannot be presented due to confidentiality.
- 7.12 However, total production capacity is also relevant, as a large amount of reserve in a quarry with only a low production rate will make smaller contribution to annual supply than equivalent reserves in a high producing quarry. Production capacity as at the end of 2022 was 1.688mtpa.
- 7.13 Permitted reserves of Crushed Rock in Oxfordshire, as reported in the SEEAWP Aggregates Monitoring Survey 2022, are shown in Table 7.6 below.

<b>Crushed Rock Permitted Reserves at 31/12/22(million tonnes)</b>
6.193mt

**Table 7.6: Crushed Rock Permitted Reserves at 31/12/22(million tonnes)<sup>30</sup>**

#### Rail Depots

- 7.14 In 2022, there were no returns from operators on sales from Rail Depots.
- 7.15 However, to a number of planning decisions in 2021, Oxfordshire has increased Oxfordshire's rail depot capacity from to over 3.5million. It is known that the increased capacity at Hennef Way Banbury is temporary to provide material for HS2, and Appleford Sidings has added two more rail sidings. This site now has a condition limiting it to 1.5million tonnes per annum.

<sup>30</sup> AM2022 Survey

## Landbanks

- 7.16 Based on the Aggregates Provision Rates set out in Section 5 that have been determined for this LAA and the permitted reserves as at 31 December 2022, as set out above, the landbanks at the end of 2022 can be seen below in Table 7.7.

<b>Permitted Reserves at 31.12.2022 by mineral type</b>	<b>Landbank (LAA Aggregates Provision Rate)</b>
<b>Soft Sand</b> 3.517m. tonnes	15.74 years at 0.243mtpa
<b>Sharp Sand &amp; Gravel</b> 9.607m. tonnes	9.74 years at 0.986mtpa
<b>Crushed Rock</b> 6.193m. tonnes	6.78 years at 0.914mtpa

**Table 7.7 Oxfordshire Landbank at 31/12/2022**

- 7.16 As can be seen the Landbanks for Sharp Sand and Gravel and Soft Sand have the 7 years required however the Crushed Rock landbank falls below the 10-year requirement for the fifth consecutive year.

## 8. Core Strategy Mineral Requirements

8.1 The Minerals and Waste Local Plan Part 1: Core Strategy (Policy M2) sets out the total provision requirement of minerals for the Plan Period 2014-2031.

These are:

- 18.27 million tonnes of Sharp Sand and Gravel
- 3.402 million tonnes of Soft Sand; and
- 10.512 million tonnes for Crushed Rock

### Sharp Sand and Gravel

8.2 Taking into account sales in 2014 – 22 (total 7.510 million tonnes), and reserves that are expected to be worked during the plan period (8.322million tonnes), the remaining requirement for the period to 2031 is 2.437million tonnes. See Appendix 3 for calculations

### Soft Sand

8.3 Taking into account sales of Soft Sand in 2014 – 2022 (total 2.150 million tonnes), and reserves that are expected to be worked during the plan period (1.802million tonnes), there are no more requirements for additional Soft Sand over the Plan Period. See Appendix 3 for calculations

### Crushed Rock

8.4 Taking into account sales in 2014 – 2022(total 8.638 million tonnes), and reserves that are expected to be worked during the plan period (5.275 million tonnes), there are no more requirements for additional Crushed Rock over the Plan Period.

8.5 Therefore To meet the Core Strategy Requirements, we will need to identify sites to meet the following:

- **Sand and Gravel – 2.437 million tonnes**
- **Soft Sand - 0 million tonnes**
- **Crushed Rock - 0 million tonnes**

## 9. Conclusion

8.1 In concluding this year's Oxfordshire's LAA, based upon consideration of all the available evidence, the Aggregates Provision Rates are:

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

8.2 To meet the Core Strategy Requirements as set out in Policy M2, we will need to identify sites to meet the following need:

- **Sand and Gravel – 2.437 million tonnes**
- **Soft Sand - 0 million tonnes**
- **Crushed Rock - 0 million tonnes**

8.3 To ensure we maintain a steady and adequate supply over the Plan Period, we need to consider these LAA Provision Rates with the permitted reserves as of 31 December 2022<sup>31</sup> and the implications for the Authorities landbank

8.4 Our landbank for Soft Sand and Sharp Sand and Gravel are both above the 7-year requirement. However, for Crushed Rock the landbank is at 6.193 years, below the NPPFs 10-year requirement.

8.5 To address this issue, in December 2022, it was agreed to commence with a New Minerals and Waste Plan for Oxfordshire.

8.6 This new Plan will consider mineral requirements for all aggregates over the new Plan period during its preparation.

8.7 Mineral requirements within the adopted Core Strategy will be replaced with the mineral requirements set out within the new Minerals and Waste Plan upon adoption.

---

<sup>31</sup> Appendix 2

## 9. List of Definitions and Acronyms

The Local Aggregate Assessment uses the following terminology throughout this report:

- **Alternative aggregates** - A general term which can be used to refer to anything other than primary, land-won aggregates. It can include secondary, recycled and sometimes marine aggregates.
- **Landbank** - Landbank is a measure of the stock of permitted reserves expressed in terms of the number of years that these would allow production for at a given average rate of extraction. It is a theoretical measure of the life of the reserves if these were to be worked at a consistent annual rate.
- **Land-won aggregates** - Primary aggregates extracted from land.
- **Marine aggregates** - Primary aggregates dredged from the sea, almost exclusively sand and gravel.
- **Primary aggregates** - These are aggregates produced from naturally occurring mineral deposits, extracted specifically for use as aggregate and used for the first time. They are produced either from rock formations that are crushed to produce 'crushed rock' aggregates, from naturally occurring sand and gravel deposits, or solid formations to produce soft sand.
- **Aggregate Provision Rate (APR)** - the quantity of aggregate for which provision needs to be made in plans within each Mineral Planning Authority in order both to satisfy local needs and to contribute fairly towards National expectations of future demand
- **Recycled aggregates** - Aggregate materials recovered from construction and demolition processes and from excavation waste on construction sites.
- **Secondary aggregates** - Aggregates derived as a by-product of other quarrying and mining operations or industrial processes, including colliery spoil, china clay waste, slate waste; power station ashes, incinerator bottom ashes and similar products.
- **Sharp Sand and Gravel** - Sharp sand tends to be relatively coarse and the component grains are more angular than soft sand (see below). Such sands are typically deposited within river channels, rather than in oceans, and are generally found, as part of a sequence of mixed sand & gravel, within river floodplains, river terraces, and (in areas which have been glaciated) within other types of deposit. As the name implies they have a sharper texture than soft sands and, although they can be used as building sand, they are generally not preferred for that purpose because they produce less 'workable' mortars, unless special additives are included in the mix, adding to the cost. They are better suited to use within concrete products, not least because they usually occur in conjunction with gravels which provide the coarse aggregate component of the concrete mix.
- **Soft Sand** - Soft Sand is generally fine-grained sand in which the individual grains are well-rounded, imparting a relatively soft texture and free-flowing nature to the sand. Such sands are commonly deposited in marine environments, where constant movement by the sea results in the rounding,



polishing and sorting of the grains. The characteristics of such sands lend themselves especially to products which are required to 'flow' or be easily 'workable' by hand when they are being used - particularly mortars, but also plaster, in the case of very fine grained sand. These are collectively known as 'building sand'. Soft Sand may also be used in asphalt products where it is used to stiffen the bitumen binder, and in concrete products - although sharp sand is more commonly used for that purpose.

The Local Aggregates Assessment uses the following acronyms throughout this report:

- **AMRI** – Annual Minerals Raised Inquiry Surveys
- **APR** – Aggregate Provision Rate
- **AWP** – Aggregate Working Party
- **BGS** – British Geological Survey
- **CLG** – Communities and Local Government (See MHCLG below)
- **DLUHC** – Department of Levelling Up, Housing and Communities
- **GDP** – Gross Domestic Product
- **LAA** – Local Aggregates Assessment
- **MASS** – Managed Aggregates Supply System
- **MPAs** – Mineral Planning Authorities
- **Mt** – Million tonnes
- **mtpa** – Million tonnes per annum
- **MHCLG** – Ministry of Housing, Communities and Local Government (now rebranded as DLUHC – Department of Levelling Up, Housing and Communities)
- **MWLP** – Minerals and Waste Local Plan
- **NPPF** – National Planning Policy Framework
- **OCC** – Oxfordshire County Council
- **PPG** – Planning Practice Guidance
- **RAWP** – Regional Aggregate Working Parties
- **ROMP** – Review of Old Mineral Permissions
- **SEEAWP** – South East of England Aggregate Working Party
  - **SHMA** – Strategic Housing Market Assessment

# Appendix 1

## Total Oxfordshire Sand and Gravel Sales (including Soft Sand)

(Source: AM Surveys and SEEAWP Surveys)

The AM2019 did not include a separate England total for Soft Sand for 2019, therefore for comparative purposes we have combined the historical records for Sharp Sand and Gravel and Soft Sand to be able to compare the 2019 figure with previous years.

	Oxfordshire Sharp Sand & Gravel Sales (million tonnes) <sup>32</sup>	Oxfordshire Soft Sand Sales (million tonnes) <sup>33</sup>	Total Oxfordshire Land won Sand and Gravel (million tonnes)	England Total Land Won Sand and Gravel (million tonnes)	Oxfordshire's sales as a percentage of England's sales <sup>34</sup>
<b>2003</b>	1.372	0.234	1.479	59.974	2.47%
<b>2004</b>	1.184	0.295	1.289	62.735	2.05%
<b>2005</b>	1.090	0.199	1.166	58.926	1.98%
<b>2006</b>	0.983	0.183	1.059	56.148	1.89%
<b>2007</b>	0.893	0.166	0.78	54.512	1.43%
<b>2008</b>	0.629	0.151	0.627	50.134	1.25%
<b>2009</b>	0.462	0.165	0.597	37.81	1.58%
<b>2010</b>	0.455	0.142	0.69	36.723	1.88%
<b>2011</b>	0.489	0.201	0.714	36.589	1.95%
<b>2012</b>	0.559	0.155	0.566	33.229	1.79%
<b>2013</b>	0.401	0.165	0.869	35.855	2.42%
<b>2014</b>	0.639	0.230	1.001	38.785	2.58%
<b>2015</b>	0.768	0.233	0.878	2015 figures not available	n/a

<sup>32</sup> Source: SEEAWP Aggregates Monitoring Surveys

<sup>33</sup> SEEAWP Aggregates Monitoring Surveys

<sup>34</sup> Figures include data for marine dredged material. This data is allocated to the county in which the port of landing is situation.

	Oxfordshire Sharp Sand & Gravel Sales (million tonnes) <sup>32</sup>	Oxfordshire Soft Sand Sales (million tonnes) <sup>33</sup>	Total Oxfordshire Land won Sand and Gravel (million tonnes)	England Total Land Won Sand and Gravel (million tonnes)	Oxfordshire's sales as a percentage of England's sales <sup>34</sup>
2016	0.651	0.227	0.954	2016 figures not available	n/a
2017	0.703	0.251	1.048	2017 figures not available	n/a
2018	0.796	0.252	1.133	2018 figures not available	n/a
2019	0.994	0.254	1.248	39.708	3.14%
2020	0.830	0.210	1.040	2020 figures not available	n/a
2021	1.157	.264	1.421	2021 Figures not available	n/a
2022	0.972	0.229	1.201	2022 Figures not available	n/a
Rolling 10 year annual average, 2003 - 2012	0.812	0.182	0.891	40.433	2.01%
Rolling 10 year annual average, 2004 - 2013	0.715	0.176	0.839	38.629	1.85%
Rolling 10 year annual average, 2005 - 2014	0.660	0.179	0.812	36.853	1.79%
Rolling 10 year annual	0.628	0.184	0.787	n/a	n/a

	<b>Oxfordshire Sharp Sand &amp; Gravel Sales (million tonnes)<sup>32</sup></b>	<b>Oxfordshire Soft Sand Sales (million tonnes)<sup>33</sup></b>	<b>Total Oxfordshire Land won Sand and Gravel (million tonnes)</b>	<b>England Total Land Won Sand and Gravel (million tonnes)</b>	<b>Oxfordshire's sales as a percentage of England's sales <sup>34</sup></b>
<b>average, 2006 – 2015</b>					
<b>Rolling 10 year annual average, 2007 – 2016</b>	0.595	0.192	0.778	n/a	n/a
<b>Rolling 10 year annual average, 2008 – 2017*</b>	0.576	0.202	0.822	n/a	n/a
<b>Rolling 10 year average 2009 – 2018</b>	0.592	0.230	0.923	n/a	n/a
<b>Rolling 10 year average 2010 – 2019</b>	0.646	0.211	0.857	n/a	n/a
<b>Rolling 10 year average 2011 – 2020</b>	0.683	0.218	0.901	n/a	n/a
<b>Rolling 10 year average 2012 – 2021</b>	0.750	0.224	1.016	n/a	n/a
<b>Rolling 10 year average 2013 – 2022</b>	0.791	0.230	1.023	n/a	n/a
<b>Average of last 3 years 2014 – 2016</b>	0.686	0.230	0.95	n/a	n/a
<b>Average of last 3 years 2015 – 2017</b>	0.707	0.237	0.717	n/a	n/a

	Oxfordshire Sharp Sand & Gravel Sales (million tonnes) <sup>32</sup>	Oxfordshire Soft Sand Sales (million tonnes) <sup>33</sup>	Total Oxfordshire Land won Sand and Gravel (million tonnes)	England Total Land Won Sand and Gravel (million tonnes)	Oxfordshire's sales as a percentage of England's sales <sup>34</sup>
Average of last 3 years 2016 - 2018	0.717	.243	0.96	n/a	n/a
Average of last 3 years 2017- 2019	0.831	.252	1.083	n/a	n/a
Average of last 3 years 2018- 2020	0.873	.239	1.112	n/a	n/a
Average of last 3 years 2019- 2021	.994	0.243	1.237	n/a	n/a
Average of last 3 years 2020- 2022	.986	0.234	1.221	n/a	n/a

Oxfordshire's Historical Mineral Sales  
Sharp Sand and Gravel 2003-2022 (million tonnes)

(Sources: SEEAWP Aggregates Monitoring Surveys, and AMRI Surveys)

	Oxfordshire Sharp Sand & Gravel Sales (million tonnes) <sup>35</sup>	England Sharp Sand & Gravel Sales (million tonnes) <sup>36</sup>	Oxfordshire's sales as a percentage of England's sales <sup>37</sup>
2003	1.372	48.674	2.82%
2004	1.184	51.591	2.29%
2005	1.090	48.109	2.27%
2006	0.983	46.316	2.12%

<sup>35</sup> Source: SEEAWP Aggregates Monitoring Surveys

<sup>36</sup> Source: Mineral Extraction in Great Britain survey, Table 2 "Sand and Gravel for Construction". Please note that 2014 is the most recent published report.

<sup>37</sup> Figures include data for marine dredged material. This data is allocated to the county in which the port of landing is situation.

	<b>Oxfordshire Sharp Sand &amp; Gravel Sales (million tonnes)<sup>35</sup></b>	<b>England Sharp Sand &amp; Gravel Sales (million tonnes)<sup>36</sup></b>	<b>Oxfordshire's sales as a percentage of England's sales <sup>37</sup></b>
<b>2007</b>	0.893	44.52	2.01%
<b>2008</b>	0.629	41.527	1.51%
<b>2009</b>	0.462	31.705	1.46%
<b>2010</b>	0.455	31.794	1.43%
<b>2011</b>	0.489	31.392	1.56%
<b>2012</b>	0.559	28.702	1.95%
<b>2013</b>	0.401	30.634	1.31%
<b>2014</b>	0.639	33.831	1.89%
<b>2015</b>	0.768	<i>2015 figures not available</i>	n/a
<b>2016</b>	0.651	<i>2016 figures not available</i>	n/a
<b>2017</b>	0.703	<i>2017 figures not available</i>	n/a
<b>2018</b>	0.796	<i>2018 figures not available</i>	n/a
<b>2019</b>	0.994	2019 figures not available	n/a
<b>2020</b>	0.83	2020 figures not available	n/a
<b>2021</b>	1.157	2021 figures not available	n/a
<b>2022</b>	0.972	2021 figures not available	n/a
<b>Rolling 10 year annual average, 2003 - 2012</b>	0.812	40.433	2.01%
<b>Rolling 10 year annual average, 2004 - 2013</b>	0.715	38.629	1.85%

	<b>Oxfordshire Sharp Sand &amp; Gravel Sales (million tonnes)<sup>35</sup></b>	<b>England Sharp Sand &amp; Gravel Sales (million tonnes)<sup>36</sup></b>	<b>Oxfordshire's sales as a percentage of England's sales <sup>37</sup></b>
<b>Rolling 10 year annual average, 2005 - 2014</b>	0.660	36.853	1.79%
<b>Rolling 10 year annual average, 2006 – 2015</b>	0.628	n/a	n/a
<b>Rolling 10 year annual average, 2007 – 2016</b>	0.595	n/a	n/a
<b>Rolling 10 year annual average, 2008 – 2017*</b>	0.576	n/a	n/a
<b>Rolling 10 year average 2009 – 2018</b>	0.592	n/a	n/a
<b>Rolling 10 year average 2010 – 2019</b>	0.646	n/a	n/a
<b>Rolling 10 year average 2011– 2020</b>	0.683	n/a	n/a
<b>Rolling 10 year average 2012– 2021</b>	0.750	n/a	n/a
<b>Rolling 10 year average 2013– 2022</b>	0.791	n/a	n/a
<b>Average of last 3 years 2014 – 2016</b>	0.686	n/a	n/a
<b>Average of last 3 years 2015 – 2017</b>	0.707	n/a	n/a
<b>Average of last 3 years 2016 - 2018</b>	0.717	n/a	n/a
<b>Average of last 3 years 2017 - 2019</b>	0.831	n/a	n/a

	<b>Oxfordshire Sharp Sand &amp; Gravel Sales (million tonnes)<sup>35</sup></b>	<b>England Sharp Sand &amp; Gravel Sales (million tonnes)<sup>36</sup></b>	<b>Oxfordshire's sales as a percentage of England's sales <sup>37</sup></b>
<b>Average of last 3 years 2018 - 2020</b>	0.873	n/a	n/a
<b>Average of last 3 years 2019- 2021</b>	0.994	n/a	n/a
<b>Average of last 3 years 2020- 2022</b>	0.986	n/a	n/a



Sales of Soft Sand 2003–2022(million tonnes)  
(Sources: SEEAWP Aggregates Monitoring Surveys, and AMRI Surveys)

	<b>Oxfordshire Soft Sand Sales (million tonnes)<sup>38</sup></b>	<b>England Soft Sand Sales (million tonnes)<sup>39</sup></b>	<b>Oxfordshire's sales as a percentage of England's sales.</b>
<b>2003</b>	0.234	11.300	2.07%
<b>2004</b>	0.295	11.144	2.65%
<b>2005</b>	0.199	10.817	1.84%
<b>2006</b>	0.183	9.832	1.86%
<b>2007</b>	0.166	9.992	1.66%
<b>2008</b>	0.151	8.607	1.75%
<b>2009</b>	0.165	6.105	2.70%
<b>2010</b>	0.142	4.929	2.88%
<b>2011</b>	0.201	5.197	3.87%
<b>2012</b>	0.155	4.527	3.42%
<b>2013</b>	0.165	5.221	3.16%
<b>2014</b>	0.230	4.954	4.64%
<b>2015</b>	0.233	<i>2015 figures not available</i>	n/a
<b>2016</b>	0.227	<i>2016 figures not available</i>	n/a
<b>2017</b>	0.251	<i>2017 figures not available</i>	n/a
<b>2018</b>	0.252	<i>2018 figures not available</i>	n/a
<b>2019</b>	0.254	2019 figure not available	n/a

<sup>38</sup> SEEAWP Aggregates Monitoring Surveys

<sup>39</sup> Source: Mineral Extraction in Great Britain survey, Table 2 "Sand and Gravel for Construction". Please note that 2014 is the most recent published report.

	<b>Oxfordshire Soft Sand Sales (million tonnes)<sup>38</sup></b>	<b>England Soft Sand Sales (million tonnes)<sup>39</sup></b>	<b>Oxfordshire's sales as a percentage of England's sales.</b>
<b>2020</b>	0.21	2020 figure not available	n/a
<b>2021</b>	0.264	2021 figure not available	n/a
<b>2022</b>	<b>0.229</b>	<b>2021 figure not available</b>	<b>n/a</b>
<b>Rolling 10 year annual average (2003 – 2012)</b>	0.189	8.246	2.34%
<b>Rolling 10 year annual average (2004 – 2013)</b>	0.182	7.637	2.38%
<b>Rolling 10 year annual average (2005 – 2014)</b>	0.176	7.018	2.51%
<b>Rolling 10 year annual average (2006 - 2015)</b>	0.179	n/a	n/a
<b>Rolling 10 year annual average (2007 - 2016)</b>	0.184	n/a	n/a
<b>Rolling 10 year annual average (2008 – 2017) *</b>	0.192	n/a	n/a
<b>Rolling 10 year annual average (2009 – 2018)</b>	0.202	n/a	n/a
<b>Rolling 10 year annual average (2010– 2019)</b>	0.211	n/a	n/a
<b>Rolling 10 year annual average (2011– 2020)</b>	0.218	n/a	n/a
<b>Rolling 10 year annual average (2012– 2021)</b>	0.224	n/a	n/a
<b>Rolling 10 year annual average (2013– 2022)</b>	0.232	n/a	n/a
<b>Average of last 3 years 2014 – 2016</b>	0.230	n/a	n/a
<b>Average of last 3 years 2015 – 2017</b>	0.237	n/a	n/a

	<b>Oxfordshire Soft Sand Sales (million tonnes)<sup>38</sup></b>	<b>England Soft Sand Sales (million tonnes)<sup>39</sup></b>	<b>Oxfordshire's sales as a percentage of England's sales.</b>
<b>Average of last 3 years 2016 – 2018</b>	.243	n/a	n/a
<b>Average of last 3 years 2017 - 2019</b>	.252	n/a	n/a
<b>Average of last 3 years 2018 - 2020</b>	.239	n/a	n/a
<b>Average of last 3 years 2019 - 2021</b>	.243	n/a	n/a
<b>Average of last 3 years 2020 – 2021</b>	.234	n/a	n/a

Sales of Crushed Rock 2003 – 2022 (million tonnes)

(Sources: SEEAWP Aggregates Monitoring Surveys, and AMRI Surveys)

	<b>Oxfordshire Crushed Rock Sales (million tonnes)<sup>40</sup></b>	<b>England Crushed Rock Sales (million tonnes)<sup>41</sup></b>	<b>Oxfordshire's sales as a percentage of England's sales.</b>
<b>2003</b>	0.629	83.957	0.75%
<b>2004</b>	0.557	85.653	0.65%
<b>2005</b>	0.564	80.593	0.70%
<b>2006</b>	0.495	83.722	0.59%
<b>2007</b>	0.717	82.922	0.86%
<b>2008</b>	0.543	75.179	0.72%
<b>2009</b>	0.363	59.666	0.61%
<b>2010</b>	0.272	50.115	0.54%

<sup>40</sup> SEEAWP Aggregates Monitoring Surveys

<sup>41</sup> Source: BGS 2014 and 2019 survey

	<b>Oxfordshire Crushed Rock Sales (million tonnes)<sup>40</sup></b>	<b>England Crushed Rock Sales (million tonnes)<sup>41</sup></b>	<b>Oxfordshire's sales as a percentage of England's sales.</b>
<b>2011</b>	0.322	57.744	0.56%
<b>2012</b>	0.242	52.980	0.46%
<b>2013</b>	0.502	53.417	0.94%
<b>2014</b>	1.061	63.835	1.66%
<b>2015</b>	0.914	<i>2015 figures not available</i>	n/a
<b>2016</b>	0.715	<i>2016 figures not available</i>	n/a
<b>2017</b>	0.867	<i>2017 figures not available</i>	n/a
<b>2018</b>	0.751	<i>2018 figures not available</i>	n/a
<b>2019</b>	0.843	83.015	1.02%
<b>2020</b>	1.087	2020 figures not available	n/a
<b>2021</b>	1.254	2021 figures not available	n/a
<b>2022</b>	<b>1.146</b>	<b>2021 figures not available</b>	n/a
<b>Rolling 10 year annual average 2003 - 2012</b>	<b>0.470</b>	<b>71.253</b>	<b>0.66%</b>
<b>Rolling 10 year annual average 2004 - 2013</b>	0.458	68.199	0.67%
<b>Rolling 10 year annual average 2005 - 2014</b>	0.508	66.017	0.77%
<b>Rolling 10 year annual average 2006 - 2015</b>	0.543	n/a	n/a

	<b>Oxfordshire Crushed Rock Sales (million tonnes)<sup>40</sup></b>	<b>England Crushed Rock Sales (million tonnes)<sup>41</sup></b>	<b>Oxfordshire's sales as a percentage of England's sales.</b>
<b>Rolling 10 year annual average 2007 - 2016</b>	0.565	n/a	n/a
<b>Rolling 10 year annual average 2008 – 2017</b>	0.580	n/a	n/a
<b>Rolling 10 year annual average 2009 – 2018</b>	0.601	n/a	n/a
<b>Rolling 10 year annual average 2010 – 2019</b>	0.649	n/a	n/a
<b>Rolling 10 year annual average 2011 – 2020</b>	0.730	n/a	n/a
<b>Rolling 10 year annual average 2012 – 2021</b>	0.824	n/a	n/a
<b>Rolling 10 year annual average 2013 – 2022</b>	0.914	n/a	n/a
<b>Average of last 3 years 2014 – 2016</b>	0.897	n/a	n/a
<b>Average of last 3 years 2015 – 2017</b>	0.832	n/a	n/a
<b>Average of last 3 years 2016 – 2018</b>	0.778	n/a	n/a
<b>Average of last 3 years 2017 – 2019</b>	0.820	n/a	n/a
<b>Average of last 3 years 2018 – 2020</b>	0.894	n/a	n/a
<b>Average of last 3 years 2019 – 2021</b>	1.061	n/a	n/a
<b>Average of last 3 years 2020-2022</b>	1.162	n/a	n/a

## Appendix 2

### Imports and Exports

#### Imports, Exports and Consumption of Primary Aggregates in Oxfordshire

2009, 2014, 2020 (millions of tonnes) (Source: Collation of the Results of the 2019 Aggregates Minerals Survey for England and Wales, MHCLG, August 2021 and Collation of the Results of the 2014 Aggregates Minerals Survey for England and Wales, DCLG, October 2016, Collation of the Results of the 2019 Aggregates Minerals Survey for England and Wales, DCLG, October 2011)

	Sand and Gravel 2009	Crushed Rock 2009	All Primary Aggregates 2009	Sand and Gravel 2014	Crushed Rock 2014	All Primary Aggregates 2014	Sand and Gravel 2019	Crushed Rock 2019	All Primary Aggregates 2019
A. Production / Sales in Oxfordshire	0.628	0.363	0.991	0.869	1.061	1.93	1.248	.843	2.091
B. Exported out of Oxfordshire	0.140	0.179	0.319	0.221	0.347	0.568	0.476	.582	1.058 <sup>42</sup>
C. Produced and consumed in Oxfordshire (A – B)	0.487	0.184	0.672	0.648	0.714	1.362	0.772	0.261	1.033
D. Imported into Oxfordshire	0.270	0.441	0.711	0.117	0.787	0.904	.128	.356	0.484

<sup>42</sup> This included the unallocated. It should be noted that some of this may have been consumed in Oxfordshire.

	<b>Sand and Gravel 2009</b>	<b>Crushed Rock 2009</b>	<b>All Primary Aggregates 2009</b>	<b>Sand and Gravel 2014</b>	<b>Crushed Rock 2014</b>	<b>All Primary Aggregates 2014</b>	<b>Sand and Gravel 2019</b>	<b>Crushed Rock 2019</b>	<b>All Primary Aggregates 2019</b>
E. Total Consumption in Oxfordshire (C+D)	0.757	0.625	1.383	0.765	1.501	2.266	0.900	0.617	1.517

The equivalent figures for 2005 are not available because Oxfordshire was grouped with Buckinghamshire and Berkshire in the AM2005 Report.

No equivalent information can be derived from the earlier AM2001 Survey report, because all results are presented on a regional basis and there are no local figures.

## Destinations

### Destinations of Sand & Gravel Produced in Oxfordshire 2009 and 2014

(Source: Oxfordshire County Council Aggregates Monitoring Survey 2009 and 2014)

<b>Destination</b>	<b>2009 Sand and Gravel (including soft sand) Tonnes</b>	<b>2009 Sand and Gravel (including soft sand) %</b>	<b>2014 Sand and Gravel (including soft sand) Tonnes</b>	<b>2014 Sand and Gravel (including soft sand) %</b>
Oxfordshire	487,260	77.6	648,282	74.60
Berkshire	20,785	3.3	99,259	11.42
Buckinghamshire & Milton Keynes	13,663	2.2	9,712	1.11
Rest of South East & London	15,565	2.5	4,642	0.81
Wiltshire, Swindon & Gloucestershire	68,203	10.9	95,089	10.94
Northamptonshire & Warwickshire	4,993	0.8	9,674	1.11
<b>TOTAL</b>	<b>627,783</b>	<b>100</b>	<b>866,658</b>	<b>100</b>

### Destinations of Crushed Rock Produced in Oxfordshire 2009 and 2014

(Source: Oxfordshire County Council Aggregates Monitoring Survey 2009 and 2014)

<b>Destination</b>	<b>2009 Crushed Rock Tonnes</b>	<b>2009 Crushed Rock %</b>	<b>2014 Crushed Rock Tonnes</b>	<b>2014 Crushed Rock %</b>
Oxfordshire	180,867	49.8	663,463	62.56
Berkshire & Buckinghamshire & Milton Keynes	23,081	6.4	254,223	23.97
Rest of South East & London	0	0	5,755	0.55



<b>Destination</b>	<b>2009 Crushed Rock Tonnes</b>	<b>2009 Crushed Rock %</b>	<b>2014 Crushed Rock Tonnes</b>	<b>2014 Crushed Rock %</b>
Wiltshire, Swindon & Gloucestershire	29,694	8.2	14,308	1.35
Northamptonshire & Warwickshire	118,788	32.7	121,258	11.43
TOTAL	362,839	100	1,060,573	99.86

The AM2005 survey report combined figures for the destinations of aggregates sold in Oxfordshire with the destinations of sales in Berkshire and Buckinghamshire. It is therefore not possible to derive equivalent figures for 2005.

### Destinations of Sand & Gravel Produced in Oxfordshire 2019

(Source: BGS/MHCLG AM2019 Survey)

For 2019, we do not currently have the exact amounts of mineral produced in Oxfordshire that were consumed by other areas.

The AM2019 set out the % of the amount of sand and gravel consumed in each destination that was produced from Oxfordshire in relation to the Authorities own total demand of sand and gravel. The table then indicates the lowest and maximum amount of sand and gravel produced from Oxfordshire based on these percentages.

### Destination of Oxfordshire's produced Land won Sand and Gravel (Including soft sand) in 2019 (1.248mt)

Destination	Proportion	Range* of tonnages produced in Oxfordshire (millions of tonnes)
Oxfordshire	62% of total sand and gravel consumed in Oxfordshire	0.772mt**
Hampshire and Isle of Wight	Between 10% and 20% of total sand and gravel consumed in Hampshire and Isle of Wight	Between 0.095mt and 0.189mt came from Oxfordshire
Buckinghamshire and Milton Keynes	Between 1% and 10% of total sand and gravel consumed in Berkshire	Between 0.014mt and 0.138mt came from Oxfordshire

Destination	Proportion	Range* of tonnages produced in Oxfordshire (millions of tonnes)
Berkshire	Between 1% and 10% of total sand and gravel consumed in Berkshire	Between 0.007mt and 0.074mt came from Oxfordshire
Wiltshire and Swindon	Between 1% and 10% of total sand and gravel consumed in Wiltshire and Swindon	Between 0.005mt and 0.052mt came from Oxfordshire
West of England (Avon)	Between 10% and 20% of total sand and gravel consumed in West of England	Between 0.002mt and 0.006mt came from Oxfordshire
Surrey, Dorset, Gloucestershire, Northamptonshire, Somerset and Exmoor National Park, Warwickshire, Worcestershire, Scotland and West London	Less than 1% of each MPAs total sand and gravel was sourced from Oxfordshire	Max .043mt came from Oxfordshire
Unknown in the South East	Between 40 and 50% sand and gravel consumed in the South East	Between 0.172mt and 0.216mt came from Oxfordshire
Unknown Destination	Between 1%-10% of the total sand and gravel consumed that went to unknown destinations.	Between 0.014mt and 0.142mt came from Oxfordshire

\*This is the highest and lowest percentage of sand and gravel from Oxfordshire taken from the importing Authorities total Sand and Gravel consumed. (Other than Oxfordshire)

\*\* Known figure from AM2019

### Destinations of Crushed Produced in Oxfordshire 2019

(Source: BGS/MHCLG AM2019 Survey)

The AM2019 set out the % of the amount of Crushed Rock consumed in each destination that was produced from Oxfordshire, in relation to the Authorities own total demand of sand and gravel. The table then indicates the lowest and maximum amount of sand and gravel produced from Oxfordshire based on these percentages.

Total Crushed Rock exported destinations in 2019 (0.582mt)

<b>Source</b>	<b>Proportion</b>	<b>Range* (millions of tonnes)</b>
Oxfordshire	31% of total Consumed Crushed Rock in Oxfordshire	0.261mt*
Northamptonshire	Between 1% and 10% of total Crushed Rock consumed in Northamptonshire	Between 0.017mt and 0.165mt came from Oxfordshire
Buckinghamshire and Milton Keynes	Between 10% and 20% of total Crushed Rock consumed in Buckinghamshire and Milton Keynes	Between 0.070 and 0.141mt came from Oxfordshire
Warwickshire	Between 1% and 10% of total Crushed Rock consumed in Warwickshire	Between 0.011mt and 0.107mt came from Oxfordshire
Berkshire	Between 1% and 10% of total Crushed Rock consumed in Berkshire	Between 0.009mt and 0.089mt came from Oxfordshire
Unknown somewhere in the South East	Between 50% and 60% of total Crushed Rock destination in the South East unknown	0.256mt and 0.307mt came from Oxfordshire
Bedfordshire, Gloucestershire, Hampshire and Isle of Wight, Hertfordshire, Surrey	Less than 1% of each MPAs total Crushed Rock was sourced from Oxfordshire	Max 0.043mt came from Oxfordshire

\*This is the highest and lowest percentage of sand and gravel from Oxfordshire taken from the importing Authorities total Crushed Rock consumed. (Other than Oxfordshire)

\*\* Known figure from AM2019

Destinations of Sand and Gravel Produced in Oxfordshire 2005, 2009 and 2014  
(Source: AM2005, and AM2009, 2014)

<b>Destination (Source MPA – Oxfordshire)</b>	<b>Sand and gravel (millions of tonnes) 2005</b>	<b>Sand and gravel (millions of tonnes) 2009</b>	<b>Sand and gravel (millions of tonnes) 2014</b>
Berkshire, Oxfordshire and Buckinghamshire	0.304	0.520 of which 0.487 in Oxfordshire	0.757 of which 0.648 in Oxfordshire
Elsewhere in South East	0.418	0.015	0.012
Elsewhere	0.550	0.090	0.100
Unallocated	0.017	0	0
<b>Total</b>	<b>1.289*</b>	<b>0.627*</b>	<b>0.869*</b>

\*Totals may not match sub totals due to varying categories

Destinations of Crushed Rock Produced in Oxfordshire 2005 and 2009

<b>Destination (Source MPA – Oxfordshire)</b>	<b>Crushed Rock (millions of tonnes) 2005</b>	<b>Crushed Rock (millions of tonnes) 2009</b>	<b>Crushed Rock (millions of tonnes) 2014</b>
Berkshire, Oxfordshire and Buckinghamshire	0.277	0.184 all in Oxfordshire	0.919
Elsewhere in South East	0.134	0.025 incl. Berkshire & Buckinghamshire	0.010
Elsewhere	0.152	0.154	0.130
<b>Total</b>	<b>0.564*</b>	<b>0.363</b>	<b>1.061</b>

\*May not match sub totals due to varying categories.

This data comparison is not currently available for AM2019.

## Sources

### Sources of Sand and Gravel consumed in Oxfordshire 2009

(Source: BGS)

Source	Proportion	Tonnage where known (millions of tonnes)
Oxfordshire	64%	0.474
Gloucestershire	25%-20%	0.145- 0.185
Warwickshire, Bristol (marine), Hampshire, Berkshire and Leicestershire (in descending order)	Between 5% and 1% from each area	n/a
Milton Keynes, Central Bedfordshire (includes Bedford Borough), Kent, Cambridgeshire, Staffordshire, Buckinghamshire, Dorset, Wiltshire, Solihull (includes Walsall) and Hertfordshire (in descending order)	Less than 1% from each area	n/a

### Sources of Crushed Rock consumed in Oxfordshire 2009

(Source: BGS)

Source	Proportion	Tonnage where known (millions of tonnes)
Oxfordshire	29%	0.181
South Gloucestershire	30%-25%	0.187- 0.156
Somerset	25% - 20%	0.156- 0.125
Leicestershire	15%-10%	0.093- 0.063
Rhondda, Cynon, Taf (Taff), Gloucestershire and Powys (in descending order)	Between 5% and 1% from each area	n/a
Shropshire, North Somerset and Caerphilly/Merthyr Tydfil (merged for confidentiality) and Derbyshire (in descending order)	Less than 1% from each area	n/a

### Sources of Sand and Gravel consumed in Oxfordshire 2014

(Source: BGS)

Source	Proportion	Tonnage where known (millions of tonnes)
Oxfordshire	80-90%	0.612 - 0.6885
Wiltshire, Windsor & Maidenhead, Cambridgeshire, Leicestershire	1-10%	0.00765 – 0.0765
Devon, Gloucestershire, Hampshire, West Berkshire, Central Bedfordshire, Essex, Hertfordshire, Northamptonshire, Staffordshire, Worcestershire.	<1%	<0.00765

### Sources of Crushed Rock consumed in Oxfordshire 2014

(Source: BGS)

Source	Proportion	Tonnage where known (millions of tonnes)
Oxfordshire	40-50%	0.6 – 0.75
Somerset	30-40%	0.45 – 0.6
Leicestershire	10-20%	0.15 – 0.3
Gloucestershire	1-10%	0.015 – 0.15
North Somerset, South Gloucestershire, Cambridgeshire, Shropshire, Powys	<1%	<0.015

### Sources of Sand and Gravel consumed in Oxfordshire 2019

(Source: BGS)

#### Total Land won Sand and Gravel (Including soft sand) consumed in Oxfordshire in 2019 (0.900mt)

Source	Proportion	Tonnage where known (millions of tonnes)
Oxfordshire	80-90%	0.772mt*
Cambridgeshire, Lincolnshire, Staffordshire and Wiltshire	Between 1% and 10% from each area	Between 0.036mt and 0.363mt**

Source	Proportion	Tonnage where known (millions of tonnes)
	of total consumed within Oxfordshire	
Leicestershire, Buckinghamshire Bristol City, Central Bedfordshire, Gloucestershire, Hampshire, Hertfordshire and Portsmouth	Less than 1% from each area	Max .081mt***

\* Exact figure taken from AM Survey 2019

\*\* The lower number represents 1% of total consumed and the higher represents 10% of total consumed.

\*\*\* A maximum of 1% was taken for each Authority that exported Minerals to Oxfordshire

### Sources of Crushed Rock Gravel consumed in Oxfordshire 2019

(Source: BGS)

#### Total Crushed Rock consumed in Oxfordshire in 2019 (0.617mt)

Source	Proportion	Tonnage Estimates (millions of tonnes)
Oxfordshire	40-50%	0.261mt*
Gloucestershire, Leicestershire, Somerset	10-20%	Between 0.185 and 0.370**
North Somerset, Powys, Rhondda Cynon Taf (Taff), Shropshire, South Gloucestershire	Between 1% and 10% from each area of total consumed within Oxfordshire	Between 0.031mt and 0.308mt***
Cambridgeshire, Derbyshire, Warwickshire	Less than 1% from each area	Max .024mt****

\* Exact figure taken from AM Survey 2019

\*\* The lower number represents 10% of total consumed and the higher represents 20% of total consumed.

\*\*\* The lower number represents 10% of total consumed and the higher represents 20% of total consumed.

\*\*\*\* A maximum of 1% was taken for each Authority that exported Minerals to Oxfordshire

## Appendix 3

Mineral provision requirements over the Plan period.

This section sets out the requirements to meet the Core Strategy Provision requirements as set out in Policy M2

### **Sand and Gravel Provision required over plan period 2014 – 2031**

(As at Dec 2022)

	<b>Sharp Sand &amp; Gravel (million tonnes)</b>
<b>A. Annual Provision (from policy M2 / LAA)</b>	1.015
<b>B. Requirement 2014 – 2031 (policy M2) (A x 18 years)</b>	18.270
<b>C. Sales in 2014 – 2022</b>	7.510
<b>D. Remaining requirement (B – C)</b>	10.760
<b>E. Permitted Reserves at end 2022</b>	9.607
<b>F. Estimated permitted reserves available to be worked during remainder of plan period (from beginning 2023 to end 2031)</b>	8.322
<b>G. Remaining requirement to be provided for in Plan (D – F)</b>	<b>2.437</b>

Notes:

1. Permitted Reserves at end 2022 (Row E) do not include approximately 1.0 million tonnes of Sharp Sand and Gravel at Thrupp Farm Quarry, Radley (South), which were previously included. Under 'ROMP' procedure the planning permission for this site has gone into suspension, and is currently dormant, and the site cannot be



worked until there has been a review of the planning conditions attached to the planning permission. An application (MW.0041/23) has been submitted. Consequently, in accordance with national Planning Practice Guidance, the 'reserves' at this site should not currently be included as permitted reserves and they do not form part of the landbank.

2. The site at Stonehenge Farm has not extracted any sand and gravel during 2022. This site has an end date of 2023 and the Planning Statement states that extraction would be at a rate of 300000tpa, whilst the Inspectors report gave 200,000tpa. If an extraction rate of 300,000tpa is taken, at the end of 2022 then there would only be 300,000 tonnes could now be extracted over the Plan period before the permission expires. This has impacted on total mineral available to be worked over the Plan period.
3. A number of sites have limited production capacity and at these current rates, will not be able to extract all the mineral required by the end of the planning permission.

## Soft Sand provision required over the Plan period 2014-2031

(As at Dec 2022)

	<b>Soft Sand Core Strategy Requirement (Million Tonnes)</b>
<b>A Annual Provision</b>	0.189 (Policy M2)
<b>B. Requirement 2014 – 2031</b>	3.402
<b>C. Sales in 2014 – 2022</b>	2.150
<b>D. Remaining requirement (B – C)</b>	1.252
<b>E. Permitted Reserves at end 2022</b>	3.517
<b>F. Estimated permitted reserves available to be worked during remainder of plan period (from beginning 2023 to end 2031)</b>	1.802
<b>G. Remaining requirement to be provided for in Plan</b>	<b>0</b>

### Notes:

1. The planning application for an extension to Bowling Green Farm Quarry submitted in 2016 and permitted in June 2017 is for the working of a total of 1.6 million tonnes of soft sand. Information in the application indicates this will be worked over 19 years from 2018 to 2036 at an average rate of working of approximately 0.08 million tonnes per annum. Mineral working at Bowling Green Farm Quarry is therefore expected to extend beyond the end of the plan period (2031); of the total of 1.6 million tonnes, it is estimated approximately 1.1 million tonnes will be worked within the plan period and approximately 0.5 million tonnes will remain to be worked after 2031.
2. The planning application for an extension to Duns Tew Quarry submitted in 2014 and permitted in May 2017 is for the working of a total of 0.415 million tonnes of soft sand. Information in the application indicates this will be worked over 16/17 years from 2017 to 2033/34 at an average rate of working of approximately 0.025 million tonnes per annum. Mineral working at Duns Tew Quarry is therefore expected to extend beyond the end of the plan period (2031).

3. The planning application at Shellingford for 1.8mt of Soft Sand was permitted at the end of 2020 along with 1mt of Crushed Rock and the site has an extraction rate of 100,000tpa, therefore only 1.1mt of aggregate will be extracted over the Plan period.
4. One of the operators returns has shown a reduced production capacity at one of the sites for soft sand, which has consequently reduced the amount of mineral available to be worked over the Plan Period. Production capacity will be explored as we consult on the new Minerals and Waste Local Plan.

### **Crushed Rock provision required over the Plan period 2014-2031**

(As at December 2022)

	<b>Core Strategy Requirement</b>
<b>A. Annual Provision (from policy M2 / LAA)</b>	0.584
<b>B. Requirement 2014 – 2031 (policy M2) (A x 18 years)</b>	10.512
<b>C. Sales in 2014 – 2022</b>	8.638
<b>D. Remaining requirement (B – C)</b>	1.874
<b>E. Permitted Reserves at end 2022</b>	6.193
<b>F. Estimated permitted reserves available to be worked during remainder of plan period (from beginning 2023 to end 2031)</b>	5.275
<b>G. Remaining requirement to be provided for in Plan</b>	<b>0</b>

## Appendix 4

### Population

The table below presents the population figures for Oxfordshire for the 10-year period (2011 to 2021)

**Table 1: Oxfordshire population figures for the 10-year period (2011 to 2021 <sup>43</sup>)**

Year	Population
2011	654,791
2012	660,009
2013	663,998
2014	669,377
2015	673,590
2016	678,484
2017	682,444
2018	687,524
2019	691,667
2020	696,880
2021*	726,530

\*Please note 2021 Mid Year Estimates (MYE) is not fully compatible with the 2011 to 2020 MYE s they are based on different national census, this is the reason for the big jump between 2020 and 2021. Figures will be updated at the end of 2023 and will be included within future Local Aggregate Assessments

### Population forecasts for Oxfordshire up to 2030

Year	Population Forecast <sup>44</sup> (ONS)	Population Forecast <sup>45</sup> (OCC)
2021	699,594	725,267
2022	703,002	734,409

<sup>43</sup> [www.ons.gov.uk/peoplepopulationandcommunity/populationandmigration/populationprojections](http://www.ons.gov.uk/peoplepopulationandcommunity/populationandmigration/populationprojections)

<sup>44</sup> [www.ons.gov.uk/peoplepopulationandcommunity/populationandmigration/populationprojections](http://www.ons.gov.uk/peoplepopulationandcommunity/populationandmigration/populationprojections)

<sup>45</sup> [insight.oxfordshire.gov.uk/cms/future-population](http://insight.oxfordshire.gov.uk/cms/future-population)

Year	Population Forecast <sup>44</sup> (ONS)	Population Forecast <sup>45</sup> (OCC)
2023	706,188	742,768
2024	709,180	750,980
2025	712,023	758,793
2026	714,785	767,844
2027	717,536	778,092
2028	720,204	790,185
2029	722,729	803,938
2030	725,092	817,349

## Housing Completion Figures

### New Build Housing completions by year in Oxfordshire<sup>46</sup>

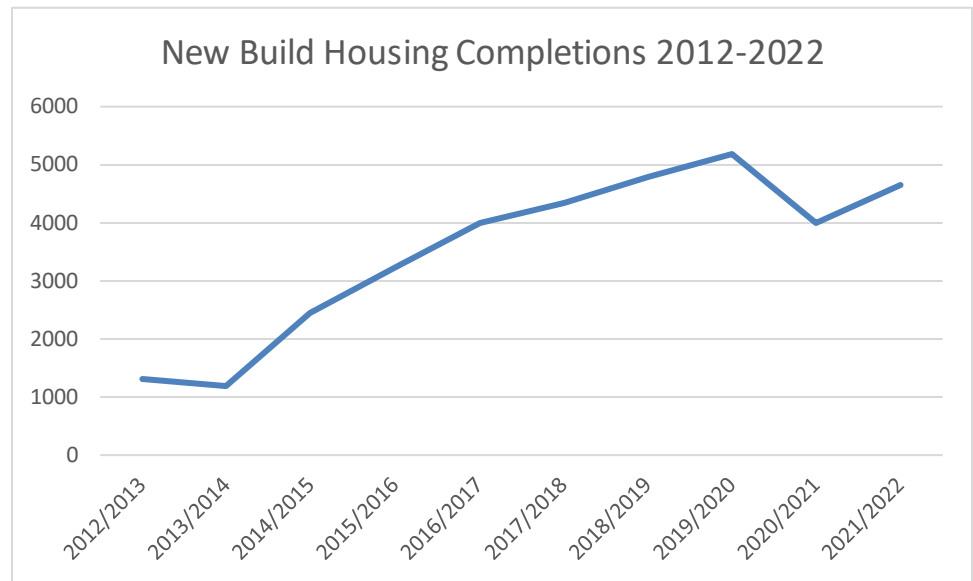
Year	New Build Housing Completions (DLUC Data)
2012/2013	1307
2013/2014	1189
2014/2015	2438
2015/2016	3256
2016/2017	4003
2017/2018	4339
2018/2019	4777
2019/2020	5184
2020/2021	4008

<sup>46</sup> [Live tables on dwelling stock \(including vacants\) - GOV.UK \(www.gov.uk\)](#) Table 100

2021/2022	4,652
-----------	-------

**Notes**

(a) completions figures in differ slightly from those in the Districts Authority Monitoring reports, which is believed due to differences in when a house is deemed 'completed'. 2021/2022 completions in District were 4,967.



Planned housebuilding<sup>47</sup>

Year	Planned housebuilding
2021	5316
2022/23	5610
2023/24	5703
2024/25	6574
2025/26	6176

<sup>47</sup> District local plans, District Planning Officers, Oxfordshire County Council Data Team

2026/27	7078
2027/28	6999
2028/29	6910
2029/30	6082
2030/31	5938

