

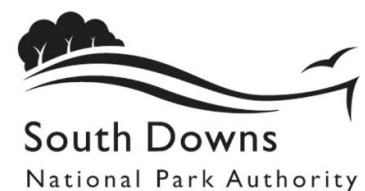
West Sussex Joint Minerals Local Plan

Assessment of Need for Aggregates: Local Aggregate Assessment Dashboard 2020

May 2021



Working in Partnership



Introduction

The National Planning Policy Framework (NPPF) requires Mineral Planning Authorities (MPAs) to prepare an annual Local Aggregates Assessment (LAA)¹ which is an evidence base document that sets out the potential demand, and assessment of potential supply, of aggregates within their area. This joint LAA dashboard has been prepared by West Sussex County Council (WSSCC) and the South Downs National Park Authority (SDNPA) and supports the West Sussex Joint Minerals Local Plan (July 2018, Partial Review March 2021).

The 4-yearly national aggregates survey (AM Survey) took place last year, reporting on aggregate sales and reserves for 2019. The impact of the Covid-19 pandemic resulted in delays on receiving the data. In the absence of data for 2019, it was not possible therefore to prepare a full update to the LAA. Instead, the South East Aggregates Working Party (SEEAWP) agreed that each mineral planning authority (MPA) submit an "LAA dashboard" making use of any data available, coupled with the application of estimates where there were data gaps.

A draft LAA dashboard was considered at SEEAWP in November 2020. Further updated data (from the AM Survey) became available following the meeting of SEEAWP, and an updated LAA dashboard was prepared, and this data has fed in to the SEEAWP Annual Report.

This LAA Dashboard is the most up-to-date picture of aggregate supply in West Sussex, replacing the LAA 2019. The methodology for the assessment of supply and demand of aggregates remains unchanged from previous LAAs and estimates only made where necessary.

The next iteration of the LAA (2021) will be a full report as previous years, that will take account of the finalised National Aggregates Survey data for 2019, as well as data collated for 2020.

The aggregate supply picture set out within the dashboard below shows that generally sales fell in 2019 (compared to 2018). The soft sand landbank has fallen below the minimum requirement of 7 years. A Soft Sand Review of the Joint Minerals Local Plan was adopted in March 2021, that allocates three sites for soft sand extraction, two of which are in the South Downs National Park, that will help meet demand to the end of the Plan period.

For sharp sand and gravel, the landbank (based on 10-year average sales data and other relevant local information) is 9 years, however the 3-year average indicates that the landbank is lower, at 7.4 years.

Sales of aggregates imported into West Sussex via wharves and railheads fell slightly, with the exception of crushed rock imports to wharves, that saw an increase. Overall, for wharves and railheads, there continues to be sufficient headroom in capacity, and those facilities continue to be safeguarded by the Joint Minerals Local Plan.

¹ See paragraph 207(a) of the NPPF.

West Sussex LAA Dashboard 2020

Source	2019 Sales (mt) (2018 sales)	Trend (previous year sales)	10-year Avg Sales (mtpa) (2010-2019)	3-year Avg Sales (mt) (2017-2019)	LAA Rate (mtpa) ²	Reserves (mt)	Landbank (years) (based on LAA Rate)	Capacity (mtpa)	Comments
Sharp Sand & Gravel (SS&G)	0.100 (0.124)	↓ Down	0.053	0.099	0.080/0.099 ³	Confidential	9/7.4	0.250	There is only one dedicated SS&G site (permitted reserve) at which operations commenced in 2017. Incidental sales from soft sand sites account for 62% of total SS&G sales during the 10-year period 2010-19, and 34% of total SS&G sales during the 3-year period 2017-19.
Soft Sand	0.303 (0.306)	↓ Down	0.287	0.297	0.370	2.457	6.6	0.502	There are three allocations for soft sand in the Joint Minerals Local Plan.
Recycled/ Secondary Aggregates	0.391 (0.391)	↔ Same	0.444	0.421	0.444			0.610	Data derived from EA WDIs, and reporting on 2018/19. Survey response rates too low for accurate figures (rolled forward for 2019 from 2018).
Marine Sand & Gravel (landings)	1.214 (1.319)	↓ Down	1.152	1.280	1.741			2.070 ⁴	Headroom capacity of 0.173mtpa (using updated LAA rate) Crown Estate landings data used for 2019 marine sand and gravel.
Rock Imports by Sea	0.123 (0.090)	↑ Up	0.103	0.126	0.156				Headroom capacity of 0.173mtpa (using updated LAA rate).
Rail Depot Sales (sand and gravel)	0.103 (0.108)	↓ Down	0.105	0.098	0.158			1.380 ⁵	Headroom capacity of 0.253mtpa (using updated LAA rate) Updated sales data from AM Survey (SEEAWP).
Rail Depot Sales (crushed rock)	0.618 (0.675)	↓ Down	0.641	0.620	0.969				Headroom capacity of 0.253mtpa (using updated LAA rate) Updated sales data from AM Survey (SEEAWP).

² The LAA rates applied are those which show the highest theoretical requirement per annum (i.e. the 10-year average + the highest demand scenario).

³ Both the 10-year average derived LAA rate of 0.080mtpa (high growth scenario) and 3-year average derived LAA rate of 0.099mtpa are presented. Both show landbanks above 7 years (9 years and 7.4 years respectively). There are three soft sand quarries in West Sussex that have produced incidental SS&G during the previous six years. In assessing any proposals for sharp sand and gravel extraction, both the 10- and 3-year average derived LAA rates and landbanks will be considered.

⁴ Total wharf capacity.

⁵ Total rail capacity.