PLANNING OFFICERS SOCIETY

and

MINERAL PRODUCTS ASSOCIATION

PRACTICE GUIDANCE ON THE PRODUCTION AND USE OF LOCAL AGGREGATE ASSESSMENTS

Living Document

May 2017

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This Guidance has been prepared and endorsed jointly by the Planning Officers Society and the Mineral Products Association.

The purpose of this Guidance is to provide mineral planning authorities (mpas) with advice on good practice in producing Local Aggregate Assessments (LAAs), and, to appraise Aggregate Working Parties (AWPs) and the mineral industry of what can be expected to be included in a LAA. LAAs should be relatively simple in style (c. 20 pages long), with clear data, and consistent terminology. An Executive Summary of key matters and a table of relevant statistics assists a quick understanding of the document. Year on year roll forwards should enable easy comparison with previous year's data, and generally not require substantial changes to the text.

This Guidance includes three appendices. Appendix 1 provides a standard framework for the Executive Summary including a template for the table of statistics. Appendix 2 sets out a checklist of potential questions that may be appropriate for consideration by mpas and AWPs in the preparation and consideration of LAAs. Appendix 3 includes examples of LAAs that illustrate different approaches used by mpas in the preparation of LAAs but these are included for information and not necessarily as an indication of good practice. This appendix will be revised and added to as practice in the preparation of LAAs develops.

1. BACKGROUND

1.1 The National Planning Policy Framework (March 2012) (NPPF) para 145, requires that minerals planning authorities should plan for a steady and adequate supply of aggregates by preparing an annual LAA based on a rolling average of 10 years sales and other relevant local information. Minerals planning authorities should take into account advice from AWPs and make provision for land won aggregates and other elements in their minerals plans.

1.2 The NPPF also states that mpas should "so far as practicable, take account of the contribution that substitute or secondary and recycled materials and minerals waste would make to the supply of materials, before considering extraction of primary materials, whilst aiming to source minerals supplies indigenously" (para. 143 second bullet).

1.3 The NPPF identifies that mpas should prepare Mineral Local Plans (MLPs) that make provision for the extraction of minerals resource of local and national importance, that define safeguarding areas, and set out suitable environmental criteria. A contribution to this plan making will be the preparation of an annual LAA, which is likely to be tested at the Public Examination. The LAA will facilitate the monitoring of supply and demand which will input into the provision needed in MLPs.

1.4 This Guidance aims to assist mpas in producing their LAAs. It should be read alongside national policy for aggregates which is set out in the NPPF. The Planning Practice Guidance (PPG)[1] provides more detail on the purpose, production and content of LAAs. This Guidance seeks not to duplicate this advice but to build on it, drawing on practice since LAAs were introduced.

1.5 LAAs serve a number of functions, principally:

- Monitoring aggregates provision and likely future demand
- Supporting evidence for preparation or review of Minerals Local Plans
- Identifying a LAA figure for calculation of landbanks

2. PRODUCING A LOCAL AGGREGATE ASSESSMENT

2.1 Every mpa should prepare a LAA. All areas can contribute towards the overall supply of aggregates in some way. For example, they could include marine aggregate landing points, rail depots, be a producer of recycled aggregates and/or a source of secondary aggregate.

2.2. LAAs can be produced jointly by agreement with one or more other mpas – this may be especially appropriate for urban based Unitary Authorities. The mpas with no primary extraction could either prepare a LAA which reports on need and

[1] http://planningguidance.planningportal.gov.uk/blog/guidance/minerals/planning-for-aggregate-minerals/local-aggregate-assessments/

consumption of primary aggregates and any alternative supplies or prepare a full joint LAA with neighbouring producing mpas. The AWP should be informed of any such arrangement.

2.3 The LAA should include an estimate of what will constitute a steady and adequate supply of aggregates. The LAA also provides a basis for assessing the need for minerals supply infrastructure such as wharves, recycling facilities and rail depots, and, any changed requirements for safeguarding.

2.4 The PPG advises that a LAA should contain three elements:

- a forecast of demand for aggregates based on both the rolling average of 10 years sales data and other relevant local information;
- an analysis of all aggregate supply options as indicated by landbanks, plan allocations and capacity data; and
- an assessment of the balance between demand and supply.

2.5 LAAs should be produced annually. LAAs should be an easily accessible document presenting information clearly and drawing conclusions on future requirements, inter mineral planning authority issues, and where relevant any matters of wider significance for example covering more than the area of the AWP. LAAs should be as brief as possible, recognising the need to convey technical information in an easy accessible way.

2.6 Consistency across all LAAs is desirable so that regional and national comparisons can be made. Information should be presented annually, and as simply as possible. To assist this, an Executive Summary and a "dashboard" of relevant data which indicates changes from the previous version should be included with each LAA. A template for the Executive Summary and "dashboard" is included in Appendix 1.

Data should typically include:

Land won sand and gravel and crushed rock	Annual sales 10 year rolling average of sales 3 year rolling average of sales Reserves – tonnage and sites Landbanks (based on 10 year average and if relevant alternative figure in LAA or adopted Plan) Estimated resources in allocated sites (if available – *to provide indication of potential future supply*)
Recycled and secondary	Annual sales Average of past sales (if data available) Recycling facilities – changes to sites and throughputs
Marine dredged aggregate	Annual sales

	Wharves – changes to sites and capacity
Imports	Tonnage and sources
Exports	Tonnage and destination (By rail and road, if data available)
Aggregates infrastructure	Rail depots – changes to sites and capacity
Planned development	Planned housing, infrastructure projects

2.7 To assist interpretation, any data presented should be easily compared to that contained in the previous year's LAA. Graphics should be used where possible to illustrate trends. Updates to text can be presented as tracked or highlighted changes but a clean version would also need to be produced.

3. DEMAND

10 YEARS ROLLING SALES AVERAGE

3.1 The starting point for a LAA, is the rolling average tonnage of the latest available 10 years of aggregate sales from the area of jurisdiction of the LAA.

3.2 The required sales data will be provided each year through the appropriate AWP. Generally each AWP, through its constituent mpas, will collect and collate data from aggregate producers, (as it has done for many years). The mpas need to issue survey forms promptly and the Mineral Products Association members and other mineral operators can assist the programme for the production of a LAA by the timely return of survey forms (see Section 9). Meeting these deadlines is important to the overall aggregate planning process, to ensure information is up to date and accurate. The data will be reported as a collation of totals for each mpa area, as is the established practice. Some AWPs undertake this process in a slightly different way.

3.3 In cases where sales data has not been submitted within the required timescale for the LAA (and the AWP Annual Report) to be produced, then the mpa should estimate the sales from any missing sites. Where it is necessary to use an estimate, the mpa could put forward a figure based on past sales and known local information on sales. The mpa should make it clear how the estimate has been arrived at and allow the operator(s) concerned an opportunity to comment on the figures.

3.4 Whilst the 10 year rolling sales average is the starting point for a LAA, LAAs must also be based on "other relevant local information".

OTHER RELEVANT LOCAL INFORMATION

3.5 Other relevant information should include consideration of levels of planned construction, including major infrastructure projects, and planned housebuilding in the mpa area and beyond, to an extent and depth which the mineral planning authority considers relevant. It should be noted that housebuilding can only be used

as a partial guide to future demand as aggregates sales reflect much wider demands including refurbishment of the housing stock and infrastructure maintenance. In addition, mpas should also look at average aggregate sales over the previous three years to identify if there is a general trend of demand that needs to be considered in relation to forthcoming supply in the consideration of whether it might be appropriate to increase supply. Where possible, planned levels of growth eg housing provision, should be compared to actual growth eg completions, over the previous ten years, to provide an indication of relative scale and therefore of potential implications for aggregates demand and supply, especially if provision higher than the 10 year average is being considered. Other factors could be considered which might affect the need to deviate from the 10 year average, for example, the scope for substitution of aggregates by other materials.

3.6 Detailed modelling at local level is unlikely to produce robust quantified forecasts of future demand. However, where growth is expected to be higher than during the preceding decade, this may justify consideration of provision above the 10 year average, accepting that there have generally been disparities between forecasted growth and actual provision. It is important for mpas to consider the indicators of potential future growth in demand for aggregates (GDP, population, planned housing, infrastructure demand) in order to make a qualitative forecast in the LAA to, if necessary, clearly indicate whether demand is considered likely to be above the prevailing 10 years average because such a situation will be tested at a Public Examination on minerals local plans.

3.7 The PPG lists some potential sources of information to use in LAAs. It should be noted that DCLG has currently decided not to undertake future Annual Minerals Raised Inquiry Surveys. The PPG also states in paragraph 68 that the national and sub-national guidelines seek to provide an indication of the total amount of aggregate provision that collectively mineral planning authorities should aim to provide, and that the guidelines provide some understanding of the context of overall demand. Although the guidelines do not relate to an individual mineral planning authority area, the PPG does state that they are capable of being a material consideration in the determination of soundness of minerals plans and in the determination of individual planning applications. (See paragraph 6.7).

3.8 Other potential factors / data that could be considered include:

- geological resources being exhausted within the following MLP period;
- trends and forecasts of population change. The current Planning Practice Guidance just refers to trends and forecasts of population change, and future house building, being potential factors to consider. Population projections will give an indication of possible household growth and wider overall demand, and Local Plans will contain allocations of housing development areas.
- validated data on aggregate use in construction provided by the Minerals Products Association;

- planned major infrastructure projects or other indicators of significant change in demand for construction materials, within the LAA area and in adjoining authorities. The National Infrastructure Plan indicates major infrastructure projects. The National Infrastructure Delivery Plan 2016-2021 updates and replaces the previous National Infrastructure Plan, outlining details of £483 billion of investment in over 600 infrastructure projects and programmes in all sectors and spread across the UK, to 2020-21 and later. Alongside economic infrastructure, for the first time this Plan includes sections on how infrastructure will support large-scale housing and regeneration projects alongside key social infrastructure (schools, hospitals and prisons), in line with the government's £100 billion commitment. The National Infrastructure Delivery Plan sets out what will be built and where, focusing specifically on nearly £300 billion of the Infrastructure Pipeline that will be delivered over the next 5 years to 2020-21. The Delivery Plan outlines support for housing and regeneration, and also gives some indications on development related to highways, rail network, airports, ports, power station provision, flood defence schemes, water & waste projects, and, community infrastructure such as schools. LAAs should consider, where relevant, projects actually referred to in the National Infrastructure Delivery Plan which are within about 30 miles of the mpa, as this could have aggregate demand implications although the source of construction materials will be determined by the market. LAAs should also refer to any other schemes included in Local Economic Partnerships' Growth Deals and Strategic Economic Plans. It would also be useful to include major construction projects where relevant identified in District and Unitary Authority's Infrastructure Development Plans, as this can indicate future levels of local demand. Mineral planning authorities could also include planned local highway improvement and maintenance works as these will require aggregate use. All of the above will only provide a general indication of potential aggregate demand. However, it does provide some context to future demand and it would be useful for AWPs to suggest a common definition of major infrastructure to be considered in individual LAAs;

- local, regional and national economic forecasts. The Treasury publishes independent forecasts on potential growth. A range of organisations (National Institute of Economic and Social Research, OBR, PwC) publish GDP forecasts. Other indicators of potential economic activity include predicated Gross Value Added. Construction Industry (CPA) and ONS produce forecasts of construction work and demand. In addition to publicly available estimates, the MPA will provide a GB-level economic outlook to AWPs for use by mineral planning authorities;

- information from the minerals industry on the availability of marine materials and the wharf capacity to handle them;

- major new sources of recycled or secondary material becoming available; and

- new environmental constraints being identified in aggregate producing areas, or in proximity to them, for example designation of National Parks, Special Protection Areas, Ramsar sites, or, Sites of Special Scientific Interest.

3.9 Some mpas have utilised other relevant information in the preparation of LAAs. Examples of LAAs which have done so are included in Appendix 3. This includes an example where closure of sites led to a conclusion that demand was depressed such as to justify a LAA figure above 10 years average sales.

3.10 There are limitations on how far specific future demand from various factors can be translated into direct aggregates demand. Further work on this aspect is necessary and any new lessons learnt will be incorporated in future versions of this Guidance.

3.11 There will need to be sufficiently robust information to justify deviation from the starting point of the 10 years rolling sales average. The use of other relevant local information needs to be based on sound evidence that is not only relevant but is adequate, proportionate and up to date. LAAs are an important part of the evidence base that is scrutinised at the Public Examination of mineral local plans.

4. SUPPLY OPTIONS

4.1 The PPG advises that LAAs should contain an analysis of all aggregate supply options. Those supply options are set out in PPG (paragraph 063) and are considered below.

4.2 **Recycled and secondary aggregate** supply within an mpa should be estimated. Recycled aggregate is normally defined as an aggregate resulting from the processing of inorganic materials previously used in construction. Secondary aggregate is usually defined as an aggregate obtained as a by-product of other quarrying and mining operations, or, as a by-product from industrial processes especially slag, incinerator bottom ash and other foundry wastes. It should be noted that it is considered that recycled aggregate cannot be relied upon to substitute for primary aggregates in many uses e.g. structural concrete.

4.3 Estimating potential aggregate arising from Construction and Demolition Waste has some difficulties. Previous national surveys (e.g. 2005) have not produced reliable data down to mineral planning authority level. National surveys have also been irregular. Tentative estimates have been obtained by attempting to disaggregate a regional figure. Another possible data source is the Waste Data Interrogator data supplied by the EA, albeit that there are limitations with this data. This is felt to be an under estimate of recycled aggregate as material reprocessed and used on a redevelopment site is not accurately recorded. An alternative method of estimating is to consider the national rate of the utilisation of recycled aggregates as a proportion of the total aggregate used in the construction industry, related to local sales. MPA estimates the use of recycled and secondary aggregates to be about 29% of all material used.

4.4 With regard to current practice, some Waste and Minerals Local Plans have targets for increased recycling of construction and demolition waste but it can be difficult then to calculate with any certainty how much additional material will be produced. Some Waste and Mineral Planning Authorities are applying methodologies to estimate construction excavation and demolition waste arisings and potential supply of recycled aggregates that consider construction activity, waste generation per unit of activity and waste composition[2].

4.5 Overall, estimating the supply and use of recycled and secondary aggregate has limitations especially in translating data at a local level. However, an indication for inclusion in a LAA still helps with understanding the full picture on material availability in an area.

4.6 **Marine aggregate** landing figures are reported by port regionally. Using information from sources other than surveys can also give a useful picture of overall trends. Detailed statistics on delivery of marine dredged aggregates are contained in the Annual Reports produced by the Crown Estate and the British Marine Aggregate Producers Association. The Marine Management Organisation has published a report on the use of beneficial dredged materials. Although much of the dredged material is likely to comprise silts and clay, a significant amount of sand & gravel is estimated. Indications of future scenarios for marine aggregate sources are also emerging in the Marine Plans being produced by the Marine Management Organisation. The Marine Policy Statement (MPS) is used as the overarching UK policy framework for the production of marine plans and in the absence of an adopted marine plan the MPS will inform decisions in the UK marine area. Marine resources are unlikely to be particularly constrained. The capacity of wharves to receive, store and process marine aggregates (reflecting berth area, water depth and tidal regime) and the future availability of capacity and individual wharf sites including possible safeguarding are issues to be considered in an LAA and MLP, particularly where assumptions are made about this material making an increasing contribution to supply. Any major changes affecting marine aggregates supply should be considered in the LAA.

4.7 LAAs should consider **imports** into and **exports** out of the LAA area. The only readily available source of this information is the Government Aggregate Monitoring Surveys which have been undertaken and published in collated form every four years, which is funded at present. Mpas may have to consider conducting their own survey. Individual mineral operators may be able to give more detailed import/export information but will only do so if it is not commercially sensitive or contrary to competition legislation.

4.8 The availability of **land-won resources** (in terms of amount of permitted reserves) is reflected in the landbanks in each authority area which are reported in the annual AWP reports. Guidance on how to calculate aggregate landbanks is given in paragraph 83 of PPG. It is important to note that the length of the landbank (in years) will be dependent on the figures in the latest LAA that are used to calculate it. It is also appropriate that the LAA should consider the productive capacity of sites collectively

[2] for example, the matter was considered at the Oxfordshire Minerals & Waste Local Plan Public Examination 2016

to supply material in the quantities required (as set out in the annual rates of provision expected in the LAA and/or MLP) and for the need for materials of a particular specification to be met. Mpas should have access to this information from their own assessments and from annual survey returns for individual sites but they should check with individual operators before revealing any information other than in the collated form appearing in annual AWP reports.

5. BALANCE BETWEEN DEMAND AND SUPPLY OPTIONS

5.1 While the 10 year average of sales provides the starting point, the factors listed above under 'other relevant information' will all be relevant in considering demand, and the balance with supply. In particular it will be necessary to consider whether future levels of growth differ substantially from those of the previous 10 years and so support deviation from using the 10 year average of sales as a basis for future demand. The LAA may also consider whether the amount and proportion of demand that may be met by different sources is likely to change.

5.2 The potential constraints on the ability to supply from different sources should also be considered, and include those posed by the availability of geological resources, protective designations, policy requirements and practical limitations.

5.3 Some mpas have undertaken this assessment in different ways and examples of LAAs that use different approaches are included in Appendix 3. As practice develops, and approaches are tested at Examination, there will be a need to review and if necessary update this Guidance.

6. CONSIDERATION OF LOCAL AGGREGATE ASSESSMENTS BY THE AGGREGATE WORKING PARTIES

6.1 Each mpa is obliged to participate in the operation of an AWP (NPPF paragraph 145 bullet point 2). One of the roles of the AWP is to consider, scrutinise and provide advice on the LAA of each mpa. There is no statutory provision for consultation on LAAs but the NPPF requires that the advice of the AWP is taken into account.

6.2 The AWP, within whose area a LAA is prepared, generally consults other AWPs on draft LAAs that have wider sub national implications. The AWPs provide an efficient consultation mechanism and will help mpas demonstrate compliance with the Duty to Co-operate under the Planning & Compulsory Purchase Act 2004 (as amended) but this is not sufficient in itself to fulfil the Duty.

6.3 It is for AWPs to determine how best to consider LAAs but it may be efficient and effective to receive short presentations of key information from each mpa at a designated AWP meeting followed by discussion and conclusion[3].

[3] for example as practices by the East of England and South East England AWPs

6.4 Mpas do not have to accept the advice of the AWP, but the views of the AWP are capable of being a material consideration in the preparation of MLPs and in making decisions on planning applications. A robust, well-argued and well-presented LAA will assist debate at the AWP. The aim should be to produce a LAA which the AWP is happy to support and in the majority of cases it is anticipated that the AWP's support for a LAA will be achieved. However, where that does not happen, the mpa is still free to use their LAA as a basis for plan making but should be prepared for the fact that any objection from the AWP may be a material consideration at the Public Examination of their Plan. Recent experience is that the AWP's views and approval of an LAA may be given weight at MLP Examinations, illustrating the importance of timely submission of LAAs to the AWP and its scrutiny process.

6.5 A checklist included as Appendix 2 to this Guidance may assist mpas in the preparation of the LAA and may help AWPs in considering and advising on LAAs. The purpose of the checklist is to give all parties an indication of some of the potential questions that in particular circumstances may be worthy of consideration.

6.6 It is for AWPs to determine how the view of the AWP on a LAA is to be determined. There is concern regarding the inconsistency of approach among the AWPs in dealing with LAAs. The following approach could comprise a "model" process. Whilst there are no voting arrangements in place, AWPs should attempt to reach a consensus on their view on any LAA and a formal letter should be sent to the mpa outlining this conclusion and any relevant views expressed. If consensus cannot be reached, the different views should be recorded and included in the letter to the mpa.

6.7 The AWP should provide an assessment on the position of overall demand and supply for each type of aggregate for the AWP area, based on the LAAs and informed by other data. The assessment should also investigate emerging trends in the area and consider whether the AWP area is making a full contribution towards what it understands is the national and regional aggregate needs, which should be reported in its Annual Monitoring Report. The context for this judgement is becoming more complex. The current national and sub national guidelines are fast becoming out of date as they only cover the period 2005 – 2020. The guidelines were based on outputs from an econometric model of the relationship between construction and aggregate consumption to predict future aggregate need.

6.8 The main driver of aggregates demand is construction activity, although the Government has recognised that the relationship between the two appeared to weaken in the 1990s. Also there may be changes in aggregate intensity of use for each type of construction. However, it is for the AWP and ultimately the National Aggregate Co-ordinating Group (NACG) to consider whether, collectively, minerals planning authorities are maintaining a steady and adequate supply of aggregate to meet national need, whatever that may be at any point in time. The role of NACG is detailed in paragraphs 77 to 79 of the Planning Practice Guidance.

6.9 The NACG will monitor the overall provision that is made for aggregates in England. The NACG will not generally provide advice on the production of individual LAAs but will monitor the annual reports produced by each AWP with particular appraisal of landbanks. NACG consider whether there are any areas of concern in ensuring the steady supply of aggregates and advise AWPs and Government accordingly.

7. CONSULTATION ON LOCAL AGGREGATE ASSESSMENTS

7.1 There are no formal requirements on consultation and this has been approached in widely different ways by mpas taking into account requirements of Statements of Community Involvement. Mpas have a Duty to Co-operate in the preparation of Mineral Local Plans. Consultation could be carried out prior to or at the same time as consideration by the AWP but it will be important that the AWP considers the final version of the LAA, particularly where this provides the basis for provision in an MLP. Engagement with other mpas and relevant prescribed bodies on a LAA is likely to contribute towards demonstrating compliance with the Duty to Co-operate.

7.2 Consultation needs to be balanced against the tight timescale for preparing LAAs on an annual basis following completion of the annual monitoring survey. It could be advantageous to seek the advice of the AWP early on in the preparation of the LAA, especially if the LAA is to have public consultation and Member endorsement. This would also be the case if a significantly different figure to the 10 years rolling sales average was going to be proposed and/or where it forms part of the evidence base underpinning a Minerals Local Plan.

8. FINALISING A LOCAL AGGREGATE ASSESSMENT

8.1 There is no statutory mechanism for the adoption or approval of a LAA by a mpa. It is for individual mpas to consider whether or not a LAA should be subject to Council Member approval (e.g. Cabinet Member or Full Cabinet). The LAA is essentially a technical and factual document, rather than a policy document, and so does not require a Strategic Environmental Assessment.

8.2 It has previously been indicated by Government that mpas are strongly encouraged to include LAAs within Authorities' Monitoring Reports. Mpas should therefore publish their LAAs on their websites.

9. POSSIBLE ANNUAL LOCAL AGGREGATE ASSESSMENT PROGRAMME/TIMING

9.1 The following programme shows a desirable timetable

Early January	AWP Aggregates Monitoring Survey forms issued by mpas.
End of March	Completed AWP Survey forms returned to the mpas.
April	Mpas consult operators on any estimates in lieu of non-returns.
End of April	Collated survey data sent by mpas to AWP Secretary for inclusion in AWP Annual Report.
May – July	Initial draft LAA produced by mpa and consultation held with other mpas, mineral operators and/or associations and environmental bodies.
September	Draft LAA submitted to AWP.
October	Formal comments and advice of AWP conveyed to mpa.
November	LAA approved by mpa.
End of December	LAA published on mpa website and/or in the Authority's Monitoring Report.

9.2 This typical programme would mean that the Annual Report of the AWP, which is required to be published by the end of June each year, would include LAAs of its constituent mpas that were concluded in the year prior to the publication of the report, based on information from the AWP survey for the year prior to that.

10. MONITORING OF MINERAL LOCAL PLANS

10.1 Assessment of the aggregates landbank, other provisions in an MLP, and the latest LAA contribute towards judging whether or not the MLP needs reviewing. The length of the landbank in years should be calculated by dividing the total estimated tonnage of aggregate reserves with permission in an mpa area by the estimated annual demand as indicated by the latest LAA. A LAA is a material consideration in determining any relevant planning application for future extraction of primary minerals or provision of capacity for recycling aggregates.

APPENDIX 1

TEMPLATE FOR EXECUTIVE SUMMARY AND "DASHBOARD"

The **Executive Summary** should comprise a short dialogue based around the following sections and a completed dashboard related to the pertaining issues within the mineral planning authority area along the lines enclosed.

Executive Summary

Introduction
Aggregates in the mineral planning authority area
Demand Indicators
Supply figures
Environmental constraints
Balance between supply and demand
Any inter mineral planning authority issues, and, any wider than the area of the AWP matters.
Conclusions

Dashboard

A dashboard should be included suited to local circumstances. Trends could also be shown for other materials. Annual Mineral Survey forms could be tailored to provide some of the information.

< **Mineral Planning Authority & Date**[1]>									
	Sales[2] (Mt) <Y>	Av.[3] (10 y) Sales (Mt)	Av.[3] (3 y) Sales (Mt)	Trend[4]	LAA[5] Rate (Mt)	Res've[6] (Mt.)	Land - bank[7] (Yrs.)	Cap'ity[8] (Mtpa)	Comments[9]
Sharp Sand & Gravel									Supply issues – potential in MLP allocations – long term opportunities/ constraints
Soft Sand									Supply issues – potential in MLP allocations – long term opportunities/ constraints
All Sand & Gravel									Supply issues – potential in MLP allocations – long term opportunities/ constraints
Crushed Rock									Supply issues – potential in MLP allocations – long term opportunities/ constraints
Recycled/Secondary Aggregates									Capacity issues - land use pressures
Marine Sand & Gravel									Capacity issues – land use pressures
Rock Imports by Sea									Capacity changes – land use pressures – security of supply
Rail Depot Sales (S & G)									Capacity changes – land use pressures – security of supply
Rail Depot Sales (Crushed Rock)									
Comments[9]	Overall picture of aggregate supply – special demands e.g. increased rate of development, significant infrastructure projects – medium term (2031) picture – long term resilience								

Notes:

1 Publication date – not the date of the data – usually a year after the relevant Aggregate Monitoring report (AMR).

2 Figures in millions of tonnes rounded to a suitable decimal place and state the AMR year.

3 Averages based on last ten/three year sales.

4 An indicator whether there is growth/decline in sales compared to previous year. Use coloured arrows. An additional column could show trends in the 10 year averages.

5 LAA Rate is the LAA Provision Rate as determined by the mpa as the suitable measure for estimating the landbank for land-won aggregates - see Planning Practice Guidance (PPG). The default for mpas is the ten year average sales, but this must be informed by the three average sales, MLP apportionment and other factors.

6 Reserves are the amount of mineral with planning permission for extraction – see PPG.

7 Landbank calculation is the reserve divided by LAA Rate to indicate life in years of the mpa reserve.

8 Capacity is an estimate of how much the quarry or site could produce based on plant capability and planning restrictions (tonnage, working hours, lorry movements). Future AM surveys might include a question of operators to help with this. Cessation of mineral extraction at individual sites should be noted.

9 LAAs should provide some discussion on supply issues so a judgement can be made whether the mpa is making an appropriate contribution to a steady and adequate supply of aggregate. The table is only intended to include the briefest of summaries and a 'traffic light' – green, amber, red – indicators might be an appropriate approach. The text could be a cross reference to appropriate paragraphs in the LAA. Reference could also be made to any proposed provision in an adopted / emerging Minerals Local Plan.

APPENDIX 2

CHECKLIST FOR CONSIDERATION BY MINERAL PLANNING AUTHORITIES AND AGGREGATE WORKING PARTIES IN ASSESSING THE ADEQUACY OF LOCAL AGGREGATE ASSESSMENTS

1. Is the draft LAA comprehensive in assessing all supply options:

a) Recycled and secondary aggregates?
b) Marine dredged aggregate?
c) Imports and exports by sea, rail and road?
d) Land-won resources of rock and sand and gravel?

2. Are the assessments realistic and supported by evidence:

a) Has the mpa used sales returns from and capacity at sites with extant permission?
b) Does it identify reasons for significant changes in sales over last 10 years? Does 'other relevant local information' justify further investigation or deviation from use of 10 year average of sales?
c) Has the mpa used AM data and Crown Estate landing figures and data on licensed reserves?
d) Is there reliable evidence on the maintenance of supply, and is there adequate capacity at wharves and rail depots to handle the LAA figure for existing and potential landings and imports?
e) Has the mpa considered a ten year sales average? If it is proposing an alternative figure to this, is there adequate justification regarding other relevant local information?
f) Is it necessary to carry out a separate assessment and present information for different types of sand and gravel aggregate ?
g) Are the assumed and planned contributions from the different sources feasible?
h) Is the estimate for the availability and use of recycled and secondary aggregate a rigorous assessment?

3. Does the draft LAA suitably assess the changes likely to impact on supply and demand over the plan period – has it:

a) Given consideration of the planned levels of development and infrastructure, including relevant major construction projects outside the mpa area and how these compare to previous years?
b) Considered the constraints on resources, production and capacity to supply?
c) Taken into account economic and environmental considerations?
d) Assessed the implications of such considerations in other authority areas that supply the mineral planning authority?
e) Identified a shortage of supply (based on forecast of demand, reserves and capacity)? If so, has this been suitably addressed?

4. **In preparing the LAA has the mpa consulted with** *(to contribute to meeting the Duty to Cooperate, especially if the LAA is being used as evidence to support preparation of an MLP):*

   a) Other relevant mpas including those from/to whom supplies are imported/exported?
   b) The aggregate industry?
   c) Environmental bodies?
   d) Other organisations such as Local Enterprise Partnerships?

5. **What are the implications of the draft LAA figures for the AWP area:**

   a) On planned provision in the AWP area?
   b) On the overall contribution of the AWP to national & local supply, compared with the current Guidelines (or the London Plan)?

APPENDIX 3

EXAMPLES OF LOCAL AGGREGATE ASSESSMENTS
(This appendix will be revised and added to over time)

Links are provided below to some examples of Local Aggregates Assessments. These represent alternative approaches to balancing demand and supply or utilising other relevant information. They are included for information and do not necessarily represent good practice or meet the aim of a 20 pages document. Best practice will emerge over time and this Guidance will be reviewed and added to over time. Also included is an example of an AWP joint assessment of LAAs.

Derbyshire County Council, Derby City Council and the Peak District National Park Local Aggregates Assessment 2016

10 years sales figure are used with a reduction of 10% for the Peak District National Park area and the addition of this to the Derbyshire area, to compensate for the progressive loss of production from the National Park and provide flexibility for any increase in demand.

http://www.derbyshire.gov.uk/environment/planning/planning_policy/minerals_waste_development_framework/minerals_plan/

Oxfordshire Local Aggregate Assessment 2015

A steeper decline in sales during the recession was identified for Oxfordshire than for England as a whole, due to some quarries being mothballed and imports being increased. To compensate for this, an adjusted 10 years sales average was developed using the pre-recession Oxfordshire proportion of England sales. This matter was considered at the Public Examination and the link below provides the Inspector's Interim Report.

https://www.oxfordshire.gov.uk/cms/content/minerals-and-waste-core-strategy

http://www.hwa.uk.com/site/wp-content/uploads/2015/08/10-11-interim-report-v6.pdf

East Sussex, South Downs and Brighton & Hove Local Aggregate Assessment, December 2015

10 year sales for land won aggregate sales are highly volatile due to there being only 2 active quarries which had intermittent extraction. A substitute figure is used from the previous Regional Plan apportionment, as used in the Adopted Waste and Minerals Plan.

http://www.eastsussex.gov.uk/environment/planning/development/mineralsandwaste/amr1.htm

West Berkshire Local Aggregates Assessment, December 2015

Appraisal found that population growth predictions not suitable as a proxy to indicate future level of demand for land won minerals.

http://info.westberks.gov.uk/CHttpHandler.ashx?id=40757&p=0

Kent Local Aggregate Assessment 2015

Estimates were used of anticipated construction and maintenance demand for aggregates. This was based on certain assumptions related to local modelling of demand from housing and construction.

https://www.kent.gov.uk/__data/assets/pdf_file/0005/28517/Minerals-and-waste-Local-Aggregate-Assessment.pdf

West Sussex Local Aggregate Assessment 2017

Consideration was given to the effect of housing and road construction on aggregate supply and demand. Scenarios were developed with relevant percentage factors applied, related to local information.

https://www.westsussex.gov.uk/about-the-council/strategies-plans-and-policies/environment-planning-and-waste-plans-and-policies/minerals-and-waste-policy/local-aggregate-assessment/

Milton Keynes Local Aggregates Assessment

The sand and gravel provision rate currently being taken forward in the emerging MLP is 0.17Mtpa which is based on the three year average sales (2010 - 2012).

http://www.milton-keynes.gov.uk/planning-and-building/planning-policy/minerals-policy

North West Aggregate Working Party

A joint assessment of LAAs by an AWP.

http://consult.cheshirewestandchester.gov.uk/portal/cwc_ldf/minerals_and_waste/nwawp/laa?tab=files