

Executive Summary

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The first East Sussex, South Downs and Brighton & Hove Local Aggregate Assessment (LAA) was published in December 2013. The LAA has been updated annually and is based on the Plan Area for the East Sussex, South Downs and Brighton & Hove Waste & Minerals Plan which was adopted in February 2013. This document represents the fourth LAA for the mineral planning authorities of East Sussex County Council, Brighton & Hove City Council and the South Downs National Park Authority and examines updates to the position on aggregates supply and demand since the time of last reporting in 2015.

The first three LAAs concluded that a significant proportion of local consumption was derived from either marine dredged material, crushed rock or land won aggregates extracted from outside the Plan Area. The Plan Area, especially the western end, was found to be very dependent on marine landings. With regard to imports, the LAA reported that the land-won contribution previously received from Kent had ceased, and that East Sussex was now supplying parts of Kent. The small contribution from West Sussex railheads, and marine landings, including crushed rock, as well as recycled and secondary aggregates, were also supplying East Sussex and Brighton & Hove and this is expected to continue.

With regards to land-won aggregates the first three LAAs concluded that the past 10 years sales data could not be used as it was too volatile; there were a very small number of production sites and therefore there had been major variations in sales figures from nothing to more substantial output. Given these circumstances, the Authorities were continuing to use the provision figure in the Adopted WMP - in actual terms the 10 years sales equates to around this figure, but this utilised confidential information.

The Government's four yearly aggregate monitoring survey (AM 2014) has recently been published. General reporting finds a similar pattern of supply to the last few years with the addition of new rail imports of crushed rock, recycled aggregate and sand and gravel at the Newhaven railhead established since 2014 North Quay Road. The total amounts of aggregates consumed and imported in East Sussex and Brighton & Hove have increased since 2009. The majority of the sources of imported materials remain similar to those in 2009 with the exception of Somerset and Conwy which have experienced a fall in exports to East Sussex and Brighton & Hove, and Cornwall and Kent which have increased exports of crushed rock to our Plan Area.

The lack of a comprehensive land won resource in the County means that there is still an expectation that imports, particularly marine-borne, will continue to be a major source for construction use in the Plan Area. It is for this reason that the Authorities place great emphasis on safeguarding wharves and railheads for mineral imports through their Waste and Minerals Local Plan documents.

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With regards to land-won supply there has been some increased production over the last 3-4 years at Lydd Quarry. In last year's LAA this was largely attributed to the construction of the Bexhill Hastings Link Road (BHLR), and the Authorities committed to continue to monitor closely the situation on aggregate supply.

A Public Examination on the soundness and legal compliance of the East Sussex, South Downs and Brighton & Hove Waste and Minerals Sites Plan commenced this Summer. During the Hearings the supply of aggregates was a matter considered by the Inspector, arising from a representation made by the Lydd Quarry operator Brett. The proposal for an extension to Lydd Quarry was put forward on the basis that there would be insufficient reserves to cover the Plan period to 2026. During the Examination Hearing the Authorities did not accept the objector's position. However, the three Authorities did commit to re-examining the situation, with the benefit of the new survey data in AM2014 and any new details on future demand. This information would enable a review the adopted minerals policies.

The Inspector's report has now been published, finding the Sites Plan sound subject to the adoption of various Modifications. In his report the Inspector noted that "While the Authorities indicated that this review would commence as soon as possible following the need for it being established, which I would endorse, no timescale was put on its completion...". It is clear to the Authorities from the information currently available that the aggregate minerals policies in the WMP are in need of review and the Authorities will set out the timetable for this review in a revised Local Development Scheme. The scope of the Review will be determined once the awaited further information is available.

This year the South East England Aggregates Working Party (SEEAWP) has requested that MPAs include a comparative Key Facts table in their LAA. The data included in this table is to be found within the LAA and is pulled together to enable easier assessment and collation of information.

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Key Facts

East Sussex, South Downs and Brighton Hove & 2016 ¹									
	Sales ² (Mt)	Av ³ (10y) Sales (Mt)	Av ³ (3y) Sales (Mt)	Trend ⁴	LAA ⁵ rate (Mt)	Reserve ⁶ (Mt.)	Landbank ⁷ (Yrs)	Capacity ⁸ (Mtpa)	Comments ⁹
Sharp Sand & Gravel	0.3 (2015)	N/A	0.4	+	N/A	2.2	N/A	No restrictions	10 year average not applicable as working has only been in East Sussex since 2011. Sales in the last 3-4 years have been higher than the rate anticipated in the planning permission, although the total for 2015 is approx. 100 000 tonnes less than 2014
Soft sand	0	c	c	Not known	N/A	0.12	N/A	Market - led?	Extraction commenced in 2007 but no extraction has taken place in recent years.
All Sand and Gravel	0.3 (2015)	c	c	Not known	0.1	2.32	23	As per market demand	The landbank for the Plan Area has been calculated in the past as the full resource available at Stanton's Farm and the reserve from the permitted sites at Lydd Quarry within the boundary of East Sussex divided by 0.1mtpa. This gives a landbank figure at the end of 2015 of 23 years. However, the use of 0.1mtpa as a the principal indicator of demand, and the method of calculating the landbank in future will be re-examined as part of any Review of Minerals Policies.
Crushed rock	0.3(2013 - amount imported and consumed)	N/A	N/A	+	N/A	0	0	0	No crushed rock produced in the Area but imports are significant element of supply. Total consumed is up since 2009.
Recycled/Secondary Aggregates	0.2 (2008/9)	N/A	Not known	Not known	N/A			0.7	Updated figures would help clarify situation

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Marine sand and gravel	c		N/A	Not known	Not known	N/A		N/A	Safeguarding of wharves is a crucial issue
Rock Imports by Sea	c		N/A	Not known	Not known	N/A		N/A	Safeguarding of wharves is a crucial issue
Rail depot sales (S&G)	0.07 (2015)		N/A	Not known	+	N/A		Not known	New imports of recycled and sand and gravel making important contribution to supply particularly for recent infrastructure projects
Rail Depot Sales (Crushed Rock)	0.1 (2015)		N/A	Not known	+	N/A		Not known	New imports of crushed rock making important contribution to supply particularly for recent infrastructure projects
Comments ⁹	<p>Overall picture of aggregate supply - currently heavily dependant on imports by road, sea and rail; land-won sand and gravel in the west of the Plan Area, significant marine imports through Shoreham Port and to lesser extent Newhaven (crushed rock only), rail imports of crushed rock, recycled aggregate and sand and gravel at Newhaven, and a level of supply from recycled aggregates throughout the Plan Area.</p> <p>Steady continuing demand anticipated.</p> <p>Need to review Waste and Minerals Plan Aggregate policies acknowledged in particular to assess future contribution from landwon. Revised MWDS to be prepared.</p>								

Table 1

Table Notes overleaf

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Table Notes:

- 1 Publication date.
- 2 Figures in millions of tonnes rounded to one decimal place. AMR year in brackets.
- 3 Averages based on last ten/three year sales.
- 4 An indicator whether there is growth (+) or decline (-) in sales.
- 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.
- 6 Reserves are the amount of mineral with planning permission for extraction.
- 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.
- 9 Brief summary on aggregate supply and any issues.

c = confidential