



Wiltshire and Swindon Local Aggregate Assessment 2017

(Incorporating data from 2008 to 2017)

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Executive Summary

The National Planning Policy Framework (NPPF) places a requirement on mineral planning authorities to prepare an annual Local Aggregate Assessment (LAA). This is a joint LAA, prepared by Wiltshire Council with agreement of Swindon Borough Council and covering the administrative areas of the two unitary authorities. This LAA reports on the demand for and supply of aggregates in the area up to and including 2017.

Aggregates in the Wiltshire and Swindon Area comprise sand and gravel deposits in two distinct forms; 'soft sand' and 'sharp sand and gravel'. There are no hard-rock producing sites in the Area. The main source of alternative aggregates arises from recycled construction and demolition waste.

Sand and gravel production within the Area continues to fall. This downward trend has seen sales fall considerably since 2009 with annual levels dropping below 0.5mt compared to levels of over 1.0mt from the late 1990s. This decline is believed to be due to macroeconomic factors and changing mineral operator strategies and/or a lack of operator interest in the remaining (more constrained) resource in the Area. During this period sites have completed extraction, but few allocated/preferred sites brought forward as replacements. As of end 2017, the landbank for soft sand and sharp sand and gravel combined stands at 5 years; less than the 7-year minimum required by the NPPF.

Permitted reserves in Wiltshire have declined significantly from 7.4mt in 2008 to 4.3mt in 2012 and just 1.77mt in 2016. Sufficient allocated sites are however identified in the Wiltshire and Swindon Aggregate Minerals Site Allocations Local Plan to meet forecast demand. The current 10-year sales average of 0.56 mtpa is significantly lower than the rate of 1.2 mtpa provided for in the Local Plan. The Local Plan rate was calculated to provide an appropriate level of flexibility and contingency should economic conditions improve, resource demand increases, and mineral industry production strategies look more to the Wiltshire and Swindon area in the future. As of 31 December 2017, there remains some 12.32 million tonnes of resource allocated for development in the Development Plan but as yet undeveloped.

Recent planning applications have however indicated a potential issue with the supply of soft sand from within the Area. For reasons of commercial confidentiality and adopted Development Plan policy, Wiltshire and Swindon Borough councils do not differentiate (in policy terms) between different types of sand and gravel for the purposes of landbank maintenance. This issue will be investigated further as part of the Annual Monitoring Report process.

1. Introduction

- 1.1 The National Planning Policy Framework (“NPPF”) states that it is essential that there is a sufficient supply of minerals to provide the infrastructure, buildings, energy and goods that the country needs. The NPPF requires that minerals planning authorities plan for a steady and adequate supply of aggregates by preparing a Local Aggregate Assessment, either individually or jointly with one or more other mineral planning authorities, on an annual basis.
- 1.2 A Local Aggregate Assessment (“LAA”) is an annual assessment of the demand for and supply of aggregates in a mineral planning authority’s area. National Planning Practice Guidance (“PPG”) provides that a LAA should contain 3 elements:
 - a forecast of the 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, mineral plan allocations and capacity data e.g. marine licences for marine aggregate extraction, recycled aggregates and the potential throughputs from wharves
 - an assessment of the balance between demand and supply, and the economic and environmental opportunities and constraints that might influence the situation. It should conclude if there is a shortage or a surplus of supply and, if the former, how this is being addressed.
- 1.3 This is a joint LAA, prepared by Wiltshire Council with agreement of Swindon Borough Council and covering the administrative areas of the two unitary authorities (‘the Area’). Wiltshire Council and Swindon Borough Council plan jointly for minerals and have successfully collaborated in the preparation and adoption of a complete set of Minerals and Waste Development Plan Documents.
- 1.4 The first LAA was published in July 2012 as part of the Wiltshire and Swindon Aggregate Minerals Site Allocation Local Plan evidence base. The councils’ second LAA, “LAA 2013”, (published September 2014) covering the years up to and including 2012, reported a considerable downturn in sand and gravel production over the previous 10-year period. This is believed to be due to macroeconomic factors and changing mineral operator strategies and/or a lack of operator interest in the remaining (more constrained) resource in the Area. Based on production levels at the time and the provision of allocated sites, it was calculated that Wiltshire and Swindon had capacity to produce sufficient levels of sand and gravel to meet demand to 2026.
- 1.5 This LAA reports on the demand for and supply of aggregates in the Area up to and including 2017.

2. Aggregates in the Wiltshire and Swindon Area

- 2.1 Wiltshire has traditionally produced a range of minerals to serve a variety of end-use applications, including chalk and clay for cement manufacture and various high-quality limestones ('building stone'). The majority of minerals extracted in the Area are for use as aggregates - bulk granular materials such as sand and gravel which are used in the construction industry for purposes such as making of concrete and concrete products, mortar, roadstone, asphalt, or for constructional fill and drainage media. The Swindon Borough area has seen comparatively little mineral working and, at present, has no permitted mineral extraction sites.

Sand and Gravel

- 2.2 Sand and gravel deposits occur in two distinct forms within the Area; 'soft sand' and 'sharp sand and gravel'.

Soft (building) Sand

- 2.3 Soft sand is mainly used as an aggregate in the building industry for producing mortars and plasters and in the manufacture of asphalt and macadam. In Wiltshire soft sand is mainly found in the Lower Greensand deposits along with the Reading Beds, Bagshot Beds and the Corallian deposits.

- 2.4 Currently most soft sand produced in the County is extracted from the Lower Greensand east of Calne. Soft sand is also produced from the Reading Beds at Brickworth Quarry near Whiteparish in the south of the County.

Sharp Sand and Gravel

- 2.5 Sharp sand is more angular and coarse than soft sand and is primarily used, together with gravel, as aggregate in the production of concrete, either for use directly in construction or in the manufacture of concrete products such as lintels, pipes and blocks. Sharp sand and gravel occurs almost entirely in the form of terrace deposits found in river valleys such as the Thames, Bristol Avon, Wylde and Salisbury Avon.
- 2.6 Although many of Wiltshire's sharp sand and gravel deposits have been worked at least to a small extent in the past, currently all the sharp sand and gravel produced in the area comes from sites located in the Cotswold Water Park in the Upper Thames Valley.

Crushed Rock Aggregate

- 2.7 Jurassic limestones have provided a wide variety of stone for building in Wiltshire and beyond. Whilst a single site was known to have worked these limestones for crushed rock aggregate, this ceased some 15-20 years ago and there are currently no sites in the Area working stone specifically for this purpose. Compared with the Carboniferous limestone won in Somerset and the former Avon area, Jurassic limestone is much softer and weaker. Jurassic limestone therefore has a greater value and use as dimension stone.

3. Demand Indicators

Production/sales

- 3.1 The NPPF requires mineral planning authorities to plan for a steady and adequate supply of aggregates by preparing an annual LAA based on a rolling average of 10 years sales data and other relevant local information.
- 3.2 This figure is based on sales information provided by site operators in response to annual minerals surveys.

Sand and gravel

- 3.3 The production of sharp sand and gravel and soft sand in Wiltshire and Swindon over the past 10 years, from 2008- 2017, is shown below in Table 1:

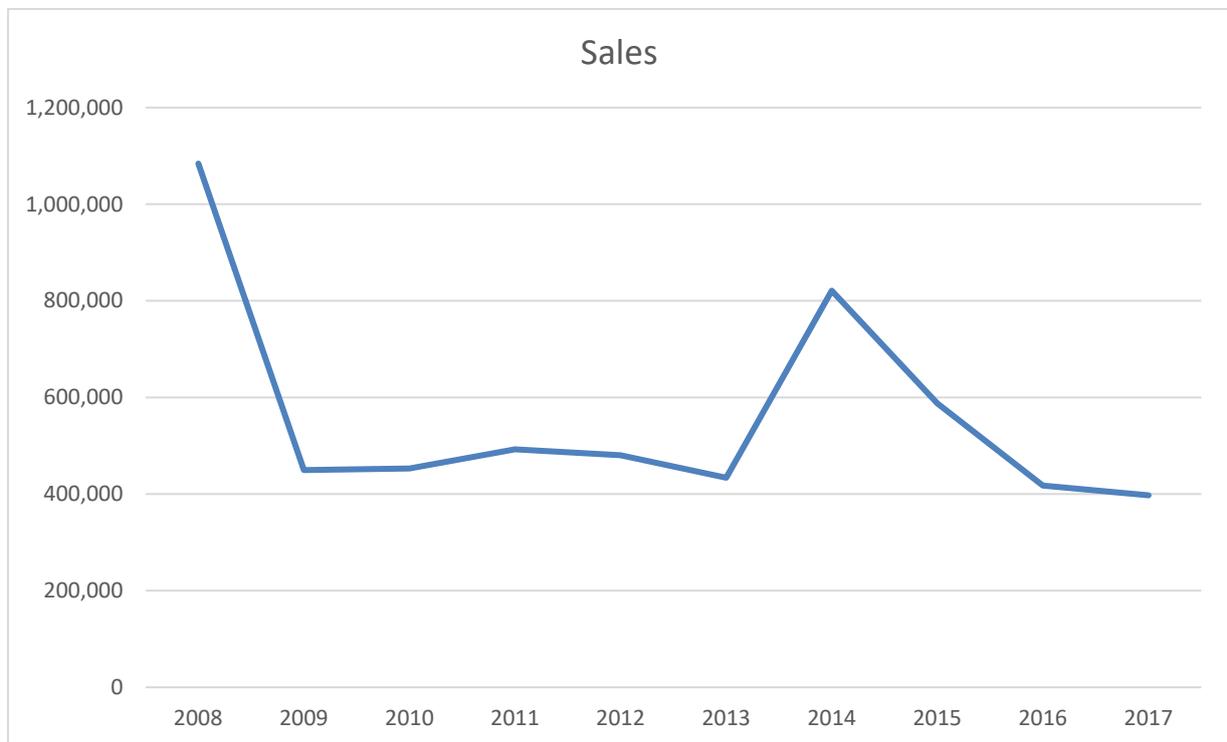
Table 1: Sand and gravel sales (sharp and soft sand combined) in Wiltshire and Swindon:

Year	Sales	Rolling 10 year Average (tonnes)	Rolling 3 year Average (tonnes)
2008	1,083,845		
2009	449,540		
2010	452,961		
2011	492,400		
2012	480,387		
2013	433,770	561,644	
2014	821,010		
2015	587,520		
2016	417,357		467,507
2017	397,646		

- 3.4 Since 2009 there has been a considerable downturn in sand and gravel production in Wiltshire and Swindon. This is due in part to the economic downturn between 2008 and 2013 but notably the completion of extraction at two quarries. Whilst 2014 saw an increase in sales, the overall downward trend has since continued. Three further quarries reached the end of their working life during this time.
- 3.5 The current 10-year rolling average of 0.56mt is substantially below the locally derived provision rate of 1.2mt per annum provided for in the Aggregate Minerals Site Allocations Local Plan (adopted May 2013). The Local Plan concluded that a local forecast of 1.2 million tonnes per annum more closely reflected actual demand, than figures derived from national and local forecasts.
- 3 years sales data**
- 3.6 Average sales over the past 3 years are even lower at 0.46mt, underlining the continued, long term decline in production.

3.7 As noted above, the closure of quarries in recent years and some permitted sites not yet being worked has resulted in a reduced number of producing sites.

Figure 1 Wiltshire and Swindon Sales Data 2008-2017



Crushed Rock

3.8 The Wiltshire and Swindon Area does not produce any crushed rock aggregate. Reserves of crushed rock from outside of the Area are therefore relied upon. Therefore, any 10-year rolling supply data is that for sales out of rail depots within the Area. There is currently only one depot within the Area and so the figures are confidential.

Other relevant local information

3.9 PPG provides that a LAA must also consider other information, such as levels of planned construction and housebuilding, when looking ahead at possible future demand for aggregates.

3.10 The Wiltshire Core Strategy, adopted in January 2015, covers the whole of Wiltshire (excluding Swindon and the New Forest National Park) and provides a positive and flexible overarching planning policy framework to guide development across Wiltshire for the period up to 2026.

3.11 Core Policy 2 sets out a delivery strategy. This seeks to provide at least 42,000 homes and 178ha of new employment land between 2006 and 2026, with a plan to ensure a continuous supply of housing over the plan period that is aligned to job growth and the delivery of infrastructure. The focus on the principal settlements results in the following requirements:

- Chippenham – at least 5,090 homes and 26.5ha of employment land
- Salisbury – at least 6,060 homes and 29ha of employment land
- Trowbridge – at least 7,000 new homes and 25ha of employment land.

The strategic transport network along the A350 corridor is to be maintained, managed and selectively improved to support development growth at Chippenham, Melksham, Trowbridge, Westbury and Warminster.

3.12 The Wiltshire Infrastructure Delivery Plan 3 2011 – 2026 (December 2016) supports the Wiltshire Core Strategy) and the Wiltshire Community Infrastructure Levy (CIL) Charging Schedule (May 2015). To meet national planning policy requirements, the Infrastructure Delivery Plan identifies the infrastructure that is needed by new housing and employment development planned in the Core Strategy. This includes:

- Highways England highlight the following areas in Wiltshire where capacity improvements to the strategic road network may be required due to future development:
 - Amesbury and Mere (impact on A303 and its junctions)
 - Chippenham and Malmesbury (impact on Junction 17 of the M4)
 - Salisbury, Warminster, Westbury and Wilton (impact on A36 and its junctions)
- Network Rail, through the Great Western RUS, identify the following railway schemes that will affect Wiltshire:
 - Electrification of the Great Western Main Line
 - Intercity Express Programme and electrification of the network
 - Improvements to Chippenham Railway Station
 - New railway stations in Corsham and Royal Wootton Bassett

3.13 The Swindon Local Plan, adopted 26 March 2015, is the principal planning policy document for the Borough, providing the development strategy to deliver sustainable growth to the year 2026. Policy SD2: The Sustainable Development Strategy provides that sustainable economic and housing growth will be delivered during the plan period through the provision of:

- 119.5 hectares of employment land (B-use class) through:
 - 77.5 hectares of additional employment land
 - 42 hectares with extant permission and existing allocations carried forward.
- About, but not less than, 22,000 dwellings between 2011 and 2026, phased as follows:
 - 1,150 average per annum between 2011 and 2016
 - 1,625 average per annum between 2016 and 2026.

- 3.14 The Swindon and Wiltshire Strategic Economic Plan (January 2016) prepared by the Swindon and Wiltshire Local Enterprise Partnership notes that the population of Swindon and Wiltshire continues to grow at above the national rate and that it will be important that planned housing completions are brought forward on schedule in order to sustain population growth in the future, with the delivery of key road junction and infrastructure improvements as priority actions to support economic and planned development growth.
- 3.15 The level of construction activity associated with future housing and infrastructure growth within Wiltshire and Swindon and the surrounding area, primarily within the principal settlements, will lead to a continuing requirement for mineral resources. The minerals provision rate of 1.2 million tonnes per annum provided for in the Site Allocations Local Plan was calculated to provide flexibility to increase production as and when economic conditions dictate.

4. Supply Options

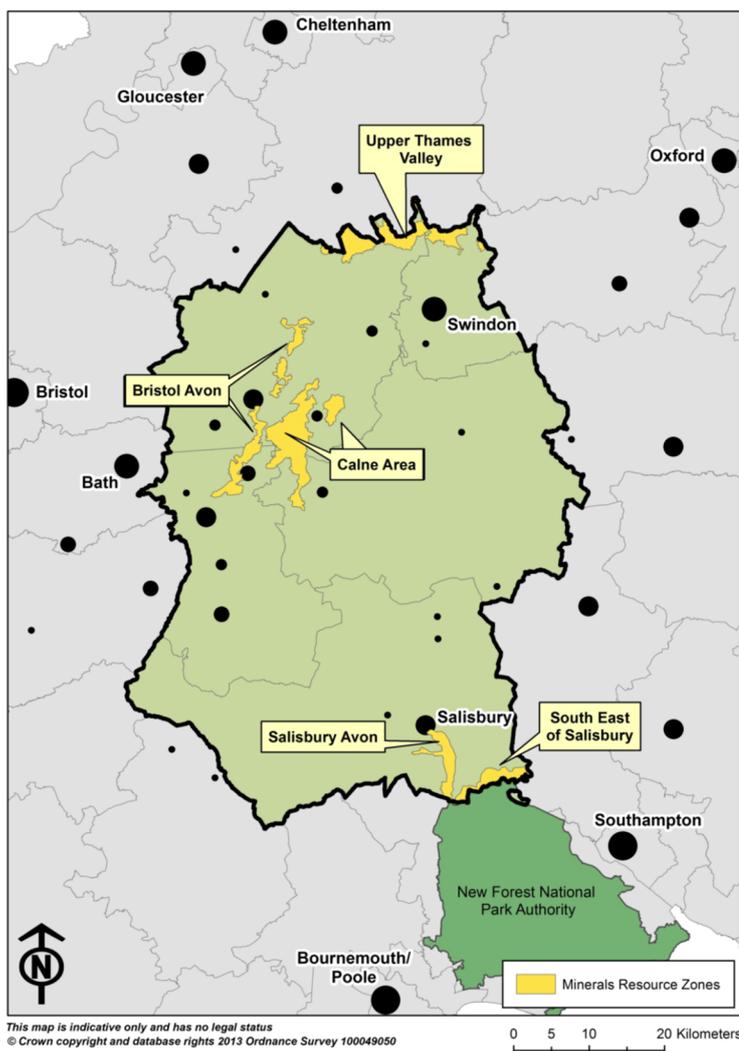
Current Supply from Wiltshire and Swindon

- 4.1 Unlike other forms of development, the location of sites for minerals extraction is essentially dictated by the extent and accessibility of the underlying geology and market demand for the mineral in that particular location.

Land-won resources

- 4.2 Historically, a significant proportion of primary aggregates originating from the Wiltshire and Swindon Area has been supplied from the relatively unconstrained sand and gravel deposits of the Upper Thames Valley, which crosses the northern boundary of Wiltshire and Swindon, and northwards into Gloucestershire and eastwards into Oxfordshire. The remainder is supplied from mainly soft sand producing quarries near Calne / Compton Bassett and land to south-east of Salisbury (near Whiteparish).
- 4.3 The adopted Wiltshire and Swindon Minerals Core Strategy identifies five broad locations referred to as 'Mineral Resource Zones' (MRZ) to be capable of providing a long-term supply of sand and gravel.

Figure 2: The location of Mineral Resource Zones in Wiltshire and Swindon



4.4 There are (as of December 2017) 5 sand and gravel sites in Wiltshire and Swindon as detailed below in Table 2:

Table 2: Permitted sand and gravel sites in Wiltshire and Swindon 2017

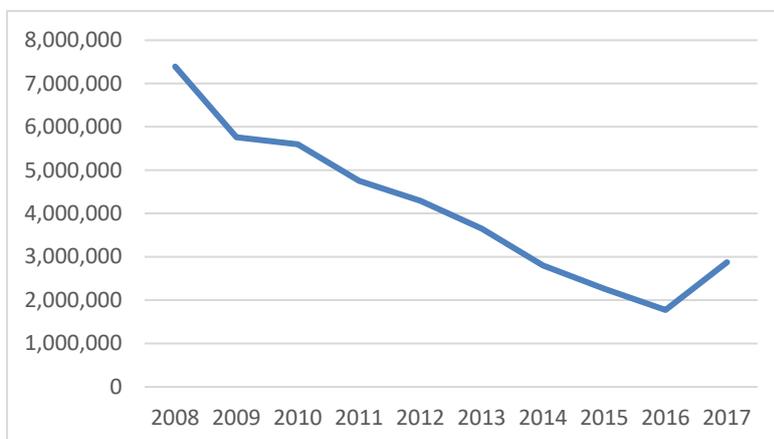
Site Name	Operator	Mineral	Current Planning Permission 'End-Date'
Upper Thames Valley MRZ			
Eysey Manor Farm	Tarmac	Sharp sand & gravel	October 2026
Dairy Farm / Manor Farm Complex	Moreton C Cullimore	Sharp sand & gravel	October 2019
Latton North (Areas 6 & 1)	Hills Quarry Products	Sharp sand & gravel	February 2023
Calne MRZ			
Compton Bassett	Hills Quarry Products	Soft Sand	May 2029
South East of Salisbury MRZ			
Brickworth	Raymond Brown	Soft Sand	August 2028

4.5 The total permitted reserve (as at December 2017) of sand and gravel at these sites was 2,872,781 tonnes.

4.6 This figure is based on reserve information provided by site operators in response to annual minerals surveys. The councils are reliant on the accuracy and completeness of the survey returns in undertaking its LAA. Permitted reserve includes current non-working sites but excludes those sites where mineral working cannot take place until there has been a review of the planning conditions attached to their planning permission.

4.7 The graph below shows the reserves figure for sand and gravel in Wiltshire and Swindon over the past 10 years:

Figure 3: Wiltshire and Swindon Permitted Reserves 2008-2017:



4.8 The graph shows that permitted reserves in Wiltshire and Swindon have declined significantly from 7.4mt in 2008 to just 1.77mt in 2016. The rise in 2017 results largely from the approval of planning application to extend an existing site as provided for in the Wiltshire and Swindon Aggregate Minerals Site Allocations Local Plan but also a reassessment of reserves by a mineral operator following the implementation of a planning permission that had been obtained some years earlier.

4.9 The Wiltshire and Swindon Area does not produce crushed rock aggregate and is dependent on imports, principally from Somerset. The Somerset LAA (Fifth Edition, incorporating data from 2007 to 2016) notes Wiltshire among the counties importing Somerset crushed rock due to limited supply and high demand, and because the counties are also rail linked.

Marine Aggregate

4.10 The Area is land-locked and therefore has no licenced areas for marine aggregate extraction. However, 74,000 tonnes of marine-won sand and gravel were imported into the Area in 2014. (Aggregate Minerals Survey of England and Wales 2014 (published 2016)).

Rail-head capacity

4.11 The Rail Aggregate Depot at Royal Wootton Bassett provides for the handling and transportation of crushed rock aggregate (i.e. the importation, storage and onward exportation of aggregate) from quarries located in the Mendip Hills in Somerset.

Landbank

4.12 The NPPF requires minerals planning authorities to plan for a steady and adequate supply of aggregates by making provision for the maintenance of landbanks of at least 7 years for sand and gravel and at least 10 years for crushed rock. This is determined by comparing the permitted reserve and the annual rate of future demand based on the latest annual Local Aggregate Assessment, to indicate life in years of the reserve.

Sand and gravel

4.13 In the interests of protecting commercial confidentiality and to accord with Policy MCS1 of the adopted Minerals Core Strategy, Wiltshire and Swindon Borough councils do not (in policy terms) differentiate between different mineral types for the purposes of landbank maintenance.

4.14 As of end 2017, the landbank for soft sand and sharp sand and gravel combined stands at 5 years; less than the 7-year minimum.

Crushed rock

4.15 The Wiltshire and Swindon Area does not produce crushed rock aggregate and so is not able to provide a crushed rock landbank.

Imports and exports

- 4.16 Planning Practice Guidance provides that mineral planning authorities must capture the amount of aggregate that it is importing and exporting as part of its Assessment.
- 4.17 The 4-yearly Aggregate Minerals Surveys provide information on the sales, movement, consumption and permitted reserves of aggregate minerals. The data presented below has been extracted from the two most recent national mineral surveys, conducted in 2009 (published 2011) and 2014 (published 2015).

Sand and gravel

	Thousand tonnes	
	2009	2014
Wiltshire and Swindon Total Sales	450	711
Wiltshire and Swindon Total Exports	184	303
Wiltshire and Swindon Total Imports	633	205
Wiltshire and Swindon Total Consumed	900	613

Crushed Rock

	Thousand tonnes	
	2009	2014
Wiltshire and Swindon Total Sales	0	45*
Wiltshire and Swindon Total Exports	0	22*
Wiltshire and Swindon Total Imports	1 116	1 116
Wiltshire and Swindon Total Consumed*	1 116	1 140

* Responses to the councils' annual survey reported no sales.

- 4.18 The latest 4-yearly Aggregate Minerals Survey (2014) provides evidence of consumption being lower than output, with greater exports out of Wiltshire and lesser imports than previously recorded.

Future aggregates supply from Wiltshire and Swindon

- 4.19 The policies of the Wiltshire and Swindon Adopted Minerals Core Strategy promote a continuation of existing supply patterns (i.e. development in existing, traditional resource zones) for soft sand and sharp sand and gravel over the period to 2026.

Mineral plan allocations

- 4.20 The Wiltshire and Swindon Aggregate Minerals Site Allocations Local Plan (adopted May 2013) sets out a schedule of seven sites for future sand and gravel extraction over the period up to 2026, shown in Table 3 below:

Table 3: Sites included in Aggregate Minerals Site Allocations Local Plan

	Site allocation	Site size (hectares)	Estimated yield of site allocations (million tonnes)
Upper Thames Valley (sharp sand and gravel)	Cox's Farm (estimated 2.4mt)	106.1	8.47
	Blackburr Farm (estimated 0.81mt)	49.7	
	North Farm (estimated 0.3mt)	75.6	
	Land east of Calcutt (estimated 2.2mt)	172.6	
	Land at Cotswold Community (estimated 2.76mt)	38.56	
Calne and SE of Salisbury (soft sand)	Land near Compton Bassett (estimated 0.45mt)	23.4	2.39
	Extension to Brickworth Quarry (estimated 1.94mt)	25.2	
Totals		491.16	10.86

- 4.21 As of end 2017, there has been little interest from the minerals industry in bringing forward many of these site allocations, with only two sites receiving planning applications: Land at Cotswold Community (undetermined) and Extension to Brickworth Quarry (granted 26/04/2017).
- 4.22 Indeed, the planning application for the Cotswold Community site is a consequence of mineral safeguarding policies being applied to a proposal for redevelopment of land and buildings present within the site allocation. A much smaller quantity of aggregate from the resource identified in the Local Plan is proposed to be recovered as part of 'prior extraction' ahead of the redevelopment scheme.
- 4.23 A planning application was submitted in December 2017 to extract and process approximately 725,000 tonnes of sand and gravel from a new site within the Upper Thames Valley MRZ. The site is not identified in the Aggregate Minerals Site Allocations Local Plan, the land in question having been excluded from the local plan during its preparation as not suitable for mineral working.

Saved minerals local plan policies

- 4.24 Policy 35 of the Wiltshire and Swindon Minerals Local Plan (adopted in November 2001) continues to be 'saved' until the first review of the Aggregate Minerals Site Allocations Plan.
- 4.25 The saved policies of the Minerals Local Plan include undeveloped Preferred Areas in the Upper Thames Valley, from within which the sharp sand and gravel resources required to meet production forecasts could be met. These Preferred Areas are listed in Policy 35.
- 4.26 The distribution of resource between the Preferred Areas and the size of areas involved is shown in Table 4 below:

Table 4: Minerals Local Plan 2001: Preferred Areas for Sharp Sand and Gravel:

Preferred Area	Area (hectares)	Resource (million tonnes)
1. Land east of Latton	59	1.4 (0.1 archaeological area*)
2. Eysey Manor Farm	156	2.7
3. Alex Farm	56	1.1 (0.3 archaeological area*)
4. Land north west of Water Eaton House	65	0.7
5. Round House Farm	56	1.2
6. Land north west of Latton	29	0.6
TOTAL	421	7.7 (0.4 archaeological area*)

* Mineral reserves in "archaeological areas" have been excluded, which may yet prove to be workable.

- 4.27 Of these, planning permission has only been obtained to develop Preferred Areas 2, 5 and two blocks of land [40ha] comprising part of Area 6 and part of Area 1.
- 4.28 Area 1 comprises two areas of land; one to the north-east and one to the south-east of the village of Latton. The larger part of Area 1 [approx. 49ha] together with Preferred Areas 3 and 4 all remain allocated but undeveloped.
- 4.29 Planning applications were submitted in 2009 that included a large extent of Preferred Area 3 and Area 4 as part of wider proposals including land within Gloucestershire to develop a "new sand and gravel quarry of strategic regional significance" [5.45mt]. However, the applications were 'disposed of' (no further action taken) in March 2015 after the prospective mineral operator apparently abandoned the proposed scheme following a change in land ownership. A planning application submitted by a different operator in 2012 to develop the north eastern corner (5.6 ha) of Preferred Area 3, adjoining Roundhouse Farm, and land (15.6 ha) north of the county boundary in Gloucestershire, was also subsequently withdrawn (in 2014). To date, there has been no further interest from the mineral industry to develop this identified resource.

4.30 The following table sets out details of the Allocated and Preferred Areas in terms of potential reserves:

Table 5: Status of Site Allocations in 2017

Site Name	Area (hectares)	Permitted (million tonnes)	Remaining (million tonnes)
1 – Land East of Latton	59	0.1	1.3
2 – Eysey Manor Farm	156	2.7	-
3 – Alex Farm	56		1.4
4 - Land north west of Water Eaton House	65		0.7
5.- Round House Farm	56	1.2	-
6.- Land north west of Latton	29	0.4	-
Cox's Farm	106.1		2.4
Blackburr Farm	49.7		0.81
North Farm	75.6		0.3
Land east of Calcutt	172.6		2.2
Land at Cotswold Community	38.56		2.76
Land near Compton Bassett	23.4		0.45
Extension to Brickworth Quarry	25.2	1.34	-
TOTAL		5.74	12.32

4.31 In total, there remains some 12.32 million tonnes of resource allocated for development in the Development Plan as of 31 December 2017.

Other resources

4.32 The Wiltshire and Swindon Aggregate Minerals Site Allocations Local Plan recognises that in addition to the one site option identified within the Calne MRZ there exists a Mineral Site - Freeth Farm, Compton Bassett - classified as “dormant” under the provisions of the Environment Act 1995. No minerals development may lawfully be carried out at dormant sites until a new scheme of conditions has been submitted to, and approved by, the Mineral Planning Authority.

4.33 An application was submitted to Wiltshire Council in June 2016 to determine the conditions to which the relevant planning permissions relating to the Freeth Farm Mineral Site are to be subject. The submitted working scheme proposes the release of c. 0.3 million tonnes of resource, which when approved would ‘top-up’ the potential landbank further. The application remains undetermined as of end 2017.

Crushed rock

- 4.34 Crushed rock is imported into the Wiltshire and Swindon Area through the Rail Aggregate Depot located at Royal Wootton Bassett in north Wiltshire from quarries located in the Mendip Hills in Somerset. The Somerset LAA (Fifth Edition, incorporating data from 2007 to 2016) notes Wiltshire among the counties importing Somerset crushed rock due to limited supply and high demand, and because the counties are also rail linked. The proximity of the Mendip quarries to parts of Wiltshire also means crushed limestone can be transported by road into areas of west and south Wiltshire.

Secondary and Recycled Aggregates

- 4.35 Secondary and recycled aggregates can be used as an alternative to primary aggregates, providing a source of materials for the construction industry. The main source of alternative aggregates in the Area arises from recycled construction and demolition (C&D) waste. There are currently no significant producers or sources of secondary aggregates within the Area and so does not contribute to the supply of aggregates in Wiltshire and Swindon.
- 4.36 Information on the full nature and extent of facilities for the processing and use of recycled aggregate within the Area is limited by the fact that, in many cases, the product is managed by temporary mobile operations related to a specific redevelopment project.
- 4.37 There is currently no robust data held by the councils to report or accurately estimate tonnages of recycled C&D waste produced in Wiltshire and Swindon and which can be reported in this LAA.
- 4.38 In its Annual Report: 2016, the South West Aggregates Working Party estimated a South West total for recycled aggregates of just less than 2mt in 2016.

Environmental constraints

- 4.39 The distribution of mineral resources throughout Wiltshire and Swindon is determined by geology; the same geology that creates the important landscapes and natural habitats that society values.
- 4.40 Wiltshire and Swindon has one of the richest and most varied natural, historic and built environments to be found across the country. The national significance of the landscape is acknowledged in the designation of the three Areas of Outstanding Natural Beauty of the Cranbourne Chase and West Wiltshire Downs, the North Wessex Downs and the Cotswolds. Additionally, the New Forest National Park lies along the southern boundary of Wiltshire.
- 4.41 Wiltshire's natural environment includes a network of designated wildlife sites of local, national and international status. The historic environment includes both built heritage assets and extensive archaeological interests including the Stonehenge and Avebury World Heritage Site.

4.42 The evidence gathered from detailed assessments undertaken as part of the site identification process for the Wiltshire and Swindon Aggregate Minerals Site Allocations Local Plan illustrated that there were very few areas left in Wiltshire and Swindon that could be considered appropriate and/or deliverable for sand and gravel extraction during the plan period to 2026. The resource in these areas is either highly constrained (in the Calne area; and south east of Salisbury area) or, as in the case of the Upper Thames Valley, is running out because of past production.

5. Balance between supply and demand

- 5.1 Sand and gravel production within the Wiltshire and Swindon Area continues to fall. This downward trend, reported in 'LAA 2013', has seen sales fall considerably since 2009 with annual levels dropping below 0.5mt compared to levels of over 1.0mt from the late 1990s.
- 5.2 This decline is believed to be due to macroeconomic factors and changing mineral operator strategies and/or a lack of operator interest in the remaining (more constrained) resource in the Area. In its Annual Report: 2016, the South West Aggregates Working Party also noted that the same local markets tend to be supplied by sand and gravel workings in both Wiltshire and Gloucestershire (i.e. the Upper Thames Valley which spans the two counties) and the same companies operate quarries on both sides of the counties' common boundary, hence sales' levels in the two counties probably reflect the companies' operating strategies and the economic recession rather than market distortions. The latest data reported in this LAA further indicates reduced capacity resulting from site closures and few of the allocated / preferred sites provided for in the Development Plan being brought forward as replacements.
- 5.3 Permitted reserves are less than half what they were 10 years ago, falling to their lowest ever level in 2016 just 1.77mt. The aggregate landbank for soft sand and sharp sand and gravel combined fell to 5 years at the end of 2017.
- 5.4 Although the landbank at the end of 2017 was below the 7-year minimum required by the NPPF, a planning application on an allocated site (Cotswold Community) and an application to commence development at an identified site (Freeth Farm) are awaiting determination. If permitted, these would take the landbank to slightly above 7 years.
- 5.5 The Wiltshire and Swindon Area does not produce crushed rock aggregate and is dependent on imports, principally from Somerset. The Somerset LAA (Fifth Edition) does not suggest any reasons why these movements cannot continue in the future. The LAA reports estimated permitted reserves for crushed rock at end of 2016 of 377 million tonnes and an estimated landbank of 30 years.
- 5.6 The level of construction activity associated with future housing and infrastructure growth within Wiltshire and Swindon and the surrounding area, primarily within the principal settlements of Swindon, Chippenham, Trowbridge and Salisbury, will lead to a continuing demand for mineral resources.
- 5.7 There are sufficient allocated sites identified in the Aggregate Minerals Site Allocations Local Plan and residual preferred areas under Saved Policy 35 of the Minerals Local Plan to meet forecast demand for sand and gravel over the plan period up to 2026. The Local Plan rate was calculated to provide an appropriate level of flexibility and contingency should economic conditions improve, resource demand increases, and mineral industry production strategies look more to the Wiltshire and Swindon area in the future.

- 5.8 Table 6 shows the current position with regards to permitted reserves and site allocations to forecast requirements (locally derived requirement of 1.2mtpa set out in the Site Allocations Local Plan and 10-year/3-year average sales).

Table 6: Sand and Gravel Provision 2017 to 2026:

	Sand and Gravel (tonnes)
Permitted reserve	2,872,781
Sites allocated in the Development Plan	12,320,000
Total	15,192,781
Total requirement 2017 to 2026 based on 1.2mtpa	10,800,000
Total requirement based on 10 year average (0.56 mtpa)	5,054,796
Total requirement based on 3 year average (0.46mtpa)	4,207,563

- 5.9 The Site Allocations Local Plan demonstrated that the expected estimated yield of the allocated sites would be sufficient to meet a locally derived apportionment figure of 1.2 million tonnes per annum up to 2026. This figure, based on a 10-year average as opposed to the national/regional forecasts published at that time, was calculated to provide an appropriate level of flexibility and contingency should economic conditions improve, resource demand increases, and mineral industry production strategies look more to the Plan area in the future. The current 10-year average of 0.56 mtpa is significantly lower and at this rate there should, subject to suitable planning applications coming forward, be enough reserves to meet forecast future demand for sand and gravel from Wiltshire and Swindon well beyond the current 2026 development plan period.
- 5.10 The latest 4-yearly Aggregate Minerals Survey (2014) provides evidence of greater exports out of Wiltshire and lesser imports than previously recorded. Recent planning applications have however indicated a potential shortfall in soft sand supply from within the Area. As noted above, for reasons of commercial confidentiality and adopted Development Plan policy, Wiltshire and Swindon Borough councils do not differentiate between different types of sand and gravel for the purposes of landbank maintenance. The Framework of adopted Minerals and Waste Development Plan Documents are being implemented and monitored through the Annual Monitoring Report (AMR) process. The issue of whether a combined or separate landbank for soft sand should be calculated and maintained will be explored further as part of that process.
- 5.11 The Wiltshire Local Development Scheme September 2017 recognises the need to review the adopted Minerals and Waste Development Plan Documents, taking into consideration the requirements of the NPPF, to identify whether the existing adopted policies need to be amended or replaced. If it is considered necessary to programme a review, this will be set out in the next update to the Local Development Scheme.

Dashboard

Wiltshire and Swindon LAA, 2017									
	Sales (Mt) 2017	Av. (10 yr) sales (Mt)	Av. (3 yr) sales (Mt)	Sales trend	LAA rate (Mtpa)	Reserve (Mt)	Landbank (Years)	Capacity (Mtpa)	Comments
Sharp Sand and Gravel	Confidential								Due to commercial confidentiality and Development Plan policy, data for sand and gravel types is combined.
Soft Sand									
All Sand and Gravel	0.40	0.56	0.46		0.56	2.87	5	0.66	Downward production trend continues, with site allocations not being developed.
Crushed Rock	0	0	0						No hard rock producing sites in Wiltshire and Swindon.
Recycled/Secondary Aggregates	No data	No data	No data						There is no data currently available.
Marine Sand and Gravel									No direct imports to Wiltshire and Swindon
Rock Imports by Sea									
Rail Depot Sales (Sand & Gravel)									
Rail Depot Sales (Crushed Rock)	*	*	*					*	
Comments	The Wiltshire and Swindon Aggregate Minerals Site Allocations Local Plan demonstrated that the expected estimated yield of the allocated sites would be enough to meet a locally derived apportionment figure of 1.2 mtpa up to 2026. The current 10-year average of 0.56 mtpa so there are enough reserves to meet demand, subject to suitable planning applications coming forward. Recent permissions and current planning applications have the potential to increase the landbank to the minimum requirement.								

This document was published by the Spatial Planning team,
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For further information please visit the following website:

<http://www.wiltshire.gov.uk/planning-policy>