HAMPSHIRE, PORTSMOUTH, SOUTHAMPTON, NEW FOREST NATIONAL PARK & SOUTH DOWNS NATIONAL PARK

Local Aggregate Assessment 2016

Hampshire Minerals and Waste Plan

December 2016

CONTENTS

List of Acronyms

AM: Aggregate Monitoring (carried out yearly)
AMRI: Annual Minerals Raised Inquiry (carried out yearly)
AMS: Aggregates Minerals Survey (carried out 4 yearly)
BGS: British Geological Survey
DCLG: Department for Communities and Local Government
IBA: Incinerator Bottom Ash (can be used to produced an aggregate)
ISA: Integrated Sustainability Appraisal
HCC: Hampshire County Council
HMWP: Hampshire Minerals and Waste Plan
LAA: Local Aggregate Assessment
MASS: Managed Aggregate Supply System
MoD: Ministry of Defence
MMO: Marine Management Organisation
MPS: Marine Policy Statement
MR: Monitoring Report (carried out yearly)
MT: Million tonnes
MTPA: Million tonnes per annum
MPA: Minerals Planning Authority
NFNPA: New Forest National Park Authority
NPPF: National Planning Policy Framework
PCC: Portsmouth City Council
SCC: Southampton City Council
SDNPA: South Downs National Park Authority
SEEAWP: South East England Aggregates Working Party
SLA: Service Level Agreement
SPZ: Source Protection Zone
SPAR: South Plans Analytical Report
SWAWP: South West Aggregates Working Party
TPA: Tonnes per annum
WRAP: Waste & Resources Action Programme

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Executive Summary

The requirement to produce an annual Local Aggregate Assessment (LAA) was introduced through the publication of the National Planning Policy Framework (NPPF)[1] in March 2012. The purpose of the LAA is to detail the current and predicted situation in Hampshire with respect to all aspects of aggregate supply, in particular with regard to the county's land-won aggregate provision up to 2030.

Hampshire is fortunate in that it has access to a number of sources of aggregate. In terms of total aggregates sales in 2015, marine-won sources provided 40% while land-won sales contributed just under 22% compared with the 10 year average of 37% and 28% respectively. A brief summary of the key points is as follows:

- Recycled and secondary aggregate sales decreased in 2015 by around 120,000 tonnes. There is approximately 1.75 millions tonnes worth of spare capacity remaining based on the updated 10 year average of recycled and secondary aggregate sales;
- Marine-won aggregate sales increased in 2015 and there is sufficient capacity to provide further marine-won aggregate if demand increases in future;
- The sales of imported crushed rock remained the same in 2015 as 2014. There continues to be adequate capacity to provide further crushed rock aggregate if demand increases in future;
- Land-won aggregate sales decreased this year, causing sales to be only 53% of the Hampshire Minerals and Waste Plan local aggregate provision which provides adequate 'headroom' for sales to increase further in the future.

This LAA has also shown that Hampshire's local aggregate provision will not impact on the wider South East region as a whole. This is a key issue as Hampshire is a net exporter of land-won sand and gravel but also imports and exports occur with neighbouring and non-neighbouring mineral planning authorities.

This document highlights that although there is generally a surplus in aggregate handling capacity there may be a need for additional infrastructure, particularly with regard to meeting Hampshire's needs for land-won mineral extraction up to 2030 and beyond. The need for any additional infrastructure - such as the further requirement for land-won extraction - will be identified through the LAA and the Hampshire Minerals and Waste Plan monitoring indicators which will highlight any developing issues in the annual Monitoring Report.

[1]National Planning Policy Framework, paragraph 145 (DCLG 2012): https://www.gov.uk/government/uploads/system/uploads/attachment_data/file/6077/2116950.pdf

Summary – Hampshire County Council October 2016									
	2015 Sales (Mt)	**Average (10 yr) Sales (Mt)**	**Ave (3yr) Sales (Mt)**	**Trend**	**LAA Rate (Mt)**	**Reserve (Mt)**	**Landbank (years)**	**Capacity (Mtpa)**	**Comments**
Sharp Sand & Gravel	0.7	0.9	0.7	-	1.3	9.9	7.7	*	Supply issues – potential in MLP allocations – long term opportunities / constraints
Soft Sand	0.1	0.2	0.1	-	0.3	1.5	5.4	*	Supply issues – potential in MLP allocations – long term opportunities / constraints
All Sand & Gravel	0.8	1.0	0.9	-	1.6	11.4	7.3	*	Supply issues – potential in MLP allocations – long term opportunities / constraints
Crushed Rock	0	-	-	-	-	-	-	-	Hampshire does not have any natural hard rock resources and therefore relies on imports of this material
Recycled / Secondary Aggregates	1.0	0.8	1.0	-	0.8	-	-	2.6	Further sites are now safeguarded to protect the capacity in Hampshire
Marine Sand & Gravel	1.6	1.4	1.5	-	1.4	-	-		Capacity issues – land use pressure
Rock Imports by Sea	0.0	-	-	-	-	-	-	0.2	Sales of crushed rock by sea are very small (426 tonnes in 2015)
Rail Depot Sales (Sand & Gravel	0	-	-	-	-	-	-		Rail depots are mainly used to import crushed rock to Hampshire. The capacity of the depots is significantly above current sales but relies on 3 sites in the south of Hampshire
Rail Depot Sales (Crushed Rock)	0.5	0.5	0.4	-	0.5	-	-	1.1	
Comments	Overall picture of aggregate supply – special demands e.g. increased rate of development, significant infrastructure projects – medium term (2031) picture – long term resilience *Quarry capacity figures to be included in LAA 2017.								

1. Introduction

1.1 Mineral aggregates (such as sand and gravel and hard rock) make an essential contribution to national prosperity and quality of life. They help to underpin the construction industry and provide the critical raw materials for built development, other construction, manufacturing and the maintenance of infrastructure. Aggregates are usually defined as hard granular materials which may be comprised of primary (extracted from the land or the sea) or recycled materials.

1.2 Hampshire County Council (HCC), Portsmouth City Council (PCC), Southampton City Council (SCC), the New Forest National Park Authority (NFNPA) and the South Downs National Park Authority (SDNPA) adopted the Hampshire Minerals & Waste Plan (HMWP) in October 2013 which was produced in partnership. The HMWP provides minerals (and waste) planning policy in Hampshire until 2030.

1.3 Since the adoption of the HMWP, this plan making partnership has come to an end and a new partnership has formed between HCC, PCC, SCC, and NFNPA, hereafter referred to as the Hampshire Authorities, to monitor and implement the Plan. A separate Service-Level Agreement (SLA) has been established between HCC and SDNPA for HCC to undertake the HMWP monitoring duties on behalf of the SDNPA.

1.4 This report is the Local Aggregate Assessment (LAA) for Hampshire and covers the administrative areas of the entire original plan making partners. The purpose of the LAA is to detail the current and predicted situation in Hampshire with respect to all aspects of aggregate supply, in particular with regard to the county's land-won aggregate provision up to 2030. The LAA covers the following sections:

- Section 2.'Aggregates in Hampshire';
- Section 3.'Total Aggregate Supply';
- Section 4.'Future Aggregate Supply, Demand, Opportunities and Constraints';
- Section 5.'Hampshire's Local Approach'; and
- Section 6.'Conclusions and review of the Local Aggregate Assessment'.

1.5 The requirement to produce an annual LAA was introduced through the publication of the National Planning Policy Framework (NPPF)[2] in March 2012. This stated that: 'Minerals planning authorities should plan for a steady and adequate supply of aggregates by preparing an annual Local Aggregate Assessment, either individually or jointly by

[2] National Planning Policy Framework, paragraph 145 (DCLG, 2012): www.gov.uk/government/uploads/system/uploads/attachment_data/file/6077/2116950.pdf

agreement with another or other mineral planning authorities, based on a rolling average of 10 years sales data'.

1.6 Following the publication of the NPPF, the Government issued further guidance on the Managed Aggregate Supply System[3] (MASS) in October 2012. This sets out that the LAA should address an assessment of:

- recycled aggregate;
- secondary aggregate;
- marine aggregate;
- imported aggregate; and
- land-won aggregate.

1.7 Guidance was also produced in April 2015 jointly by the Planning Officers Society and the Mineral Product Association[4]. This guidance provides advice to mineral planning authorities of what should be included and accounted for within a Local Aggregate Assessment. The following main aspects should be addressed:

- a forecast of the demand for aggregates based on the average of 10 year rolling sales data and other relevant local information, such as planned major infrastructure projects and housebuilding within the Mineral Planning Authority (MPA) area as well as addressing three year average sales data (see Total Aggregate Supply);

- 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 and the potential throughputs from wharves. Import and export levels of aggregate through rail depots should also be accounted for within the assessment. This analysis should be informed by planning information, the aggregate industry and other bodies such as local enterprise partnerships (see Future Aggregate Supply, Demand, Opportunities and Constraints); and

- an assessment of the balance between supply and demand, 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 (see Future Aggregate Supply, Demand, Opportunities and Constraints and Conclusions and review of the Local Aggregate Assessment).

[3] Guidance on Managed Aggregate Supply System (DCLG, 2012): https://www.gov.uk/government/uploads/system/uploads/attachment_data/file/14721/2238394.pdf

[4] Practice Guidance on the Production and use of Local Aggregate Assessments (POS and MPA, 2015) http://www.mineralproducts.org/documents/LAA_Guidance.pdf

1.8 The LAA analyses relevant data on aggregates and concludes what this shows about the picture of supply and demand in Hampshire. It is important to note that this data predominantly comes from the annual monitoring of aggregates sales by the Hampshire Authorities including the SDNPA on behalf of the South East England Aggregate Working Party (SEEAWP). The Aggregate Monitoring (AM) survey collects annual sales data from active mineral extraction sites, minerals wharves, minerals rail depots and recycled aggregate processing sites.

1.9 The most recent survey of this nature is the AM 2015 survey which has been used in the preparation of this LAA.

1.10 Every four years the AM survey is expanded into a more comprehensive national survey referred to as the Aggregate Minerals Survey (AMS) which also collects data on the movement of minerals, including mineral imports and exports between authorities. The information collected allows for an estimate to be made for the 'consumption' of aggregates by MPA authority areas. This survey, undertaken jointly between the Department for Communities and Local Government (DCLG) and the British Geological Survey (BGS) provides broad land-won sand and gravel import and export figures for both regional areas and MPAs. The latest survey of this nature has been undertaken in 2014, information from this survey is referenced within this report.

1.11 Other information on the use and need for aggregates was prepared in the evidence base documents produced as part of the HMWP. These documents provide more detailed aggregate information and analysis in most circumstances and are referenced within this LAA where appropriate. This includes the following documents:

- HMWP100b - Minerals in Hampshire - Background Study (Hampshire Authorities, 2013)[5].
- HMWP101 - Hampshire Minerals Proposal Study (Hampshire Authorities, 2012)[6].
- HMWP125 - Wharves and Rail Depots Study (Hampshire Authorities, 2012)[7].

1.12 This LAA is an update to the LAA produced in 2015. The last LAA was published in December 2015, following consultation in October/November 2015 with SEEAWP and other interested parties.

[5] Minerals in Hampshire – Background Study: http://documents.hants.gov.uk/mineralsandwaste/HMWP100bMineralsinHampshirev7-SubmissionRevisedFeb2013.pdf
[6] Hampshire Minerals Proposal Study: http://documents.hants.gov.uk/mineralsandwaste/HMWP101MineralsProposalStudyv5-SubmissionFeb2012.pdf
[7] Hampshire Wharves and Rail Depots Study: http://documents.hants.gov.uk/mineralsandwaste/HMWP125WharvesandRailDepotsStudyv4-SubmissionFeb2012.pdf

The LAA is published alongside the Monitoring Report (MR) of the HMWP.

1.13 The MR is an essential tool to monitor the policies within the HMWP and covers other areas (not covered by the LAA) that are subject to monitoring via a number of monitoring indicators set out in Appendix C of the adopted HMWP. The MR will report on the current landbank, which is covered in Section 2.4 'Land-won Sand and Gravel', as it is used as a monitoring indicator by the Hampshire Authorities, and the SDNPA, to review the current local aggregate provision and to decide whether a review of mineral site allocations within the HMWP is required.

1.14 The MR will be published alongside a finalised version of this LAA in December 2016. It is intended that the MR and the finalised LAA will be published each year in December hereafter.

2. Aggregates in Hampshire

2.1 Hampshire has the capability of supplying aggregates from a number of sources including:

- recycled and secondary aggregate;
- dredging sand and gravel from the sea bed (marine-won);
- importing aggregate; and
- extracting sand and gravel from the land (land-won).

2.2 When planning for a steady and adequate supply of minerals, minerals planning authorities (mpas) such as the Hampshire Authorities and the SDNPA have a duty to consider all supply options (including marine-won, secondary and recycled sources and land won) when determining total aggregate supply and demand. This was duly undertaken through the development of the adopted HMWP (2013).

2.1 Recycled and Secondary Aggregate

2.1.1 Recycled and secondary aggregate play an important role in the total aggregate supply in Hampshire and provide an opportunity to reduce the need for land or marine-won sand and gravel or other aggregates. Recycled aggregates are those derived from construction, demolition and excavation waste that has been reprocessed to provide materials or products suitable for use within the construction industry. It includes materials such as:

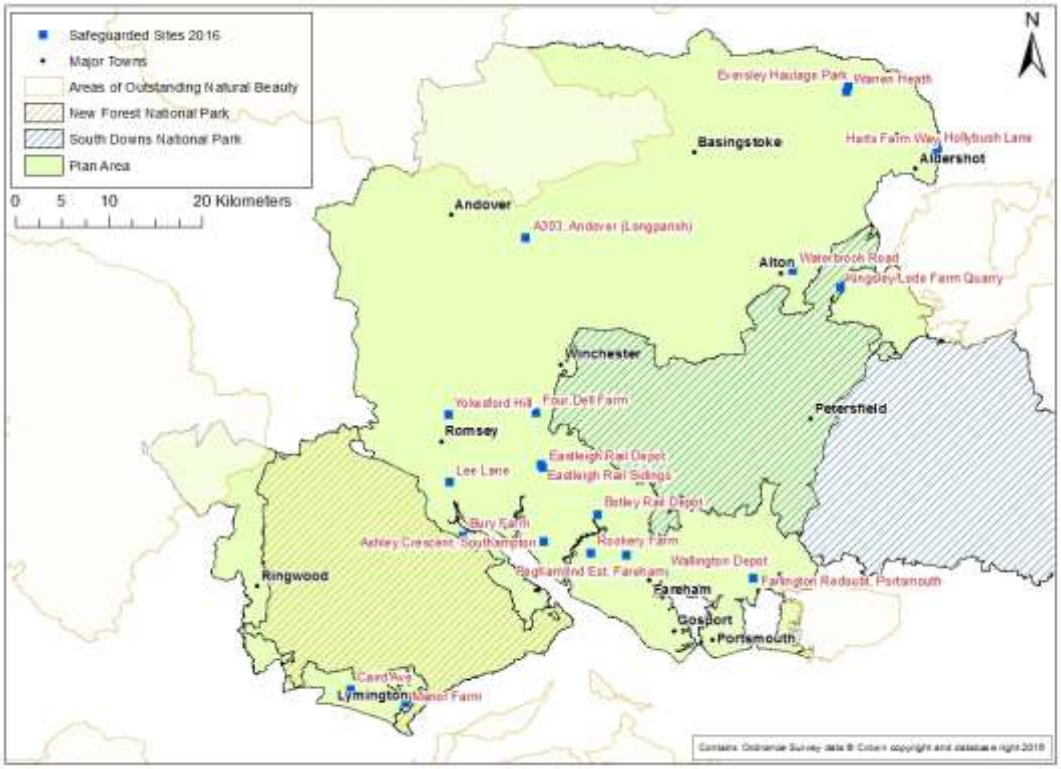
- stone;
- concrete;
- brick; and
- asphalt.

2.1.2 These materials can be re-used (rather than being disposing of). There are also secondary aggregates which are comprised of materials which are slightly different to the sources noted above and are usually by-products of other construction or industrial processes. For example, the production of Incinerator Bottom Ash (IBA) from Hampshire's Energy Recovery Facilities as a by-product of the incineration process which can be used as a secondary aggregate for road construction. Other types of secondary aggregate include spent railway ballast and recycled glass.

2.1.3 A significant amount of recycled and secondary aggregate is processed on development and construction sites, but an increasingly large amount is processed at free standing sites or sites located within existing minerals and waste activities such as quarries, waste transfer, materials recovery and landfills. There are 29 sites which hold valid

planning permissions for the production of recycled and secondary aggregates in Hampshire, 21 are considered to be strategic sites and therefore safeguarded in accordance with Policy 16 of the adopted HMWP (2013). This is an increase from 2014 due to a review of the safeguarded sites list. This review highlighted further existing sites which required safeguarding using the HMWP safeguarding criteria. These sites each have the capacity to manage at least 50,000 tonnes per annum (tpa) and collectively have a capacity of over 1.6 mt. Safeguarded sites generally have permanent or long term planning permission. The following map highlights the location of safeguarded aggregate recycling facilities in Hampshire.

Figure 1 - Safeguarded aggregate recycling facilities



Source: *Hampshire Authorities, 2016*

2.1.4 The sales figures of recycled and secondary aggregate in Hampshire for the most recent 10 year period, 2006 - 2015, are detailed in Table 1.

Table 1 - Recycled and secondary aggregate sales in Hampshire, 2006 - 2015 (million tonnes (mt)

Year	2006	2007	2008	2009	2010	2011	2012	2013	2014	2015	Last 3 yr average	Last 10 yr average
Sales	0.62	0.55	0.64	0.60	0.79	0.93	0.81	0.93	1.11	0.99	1.01	0.80
* Sales are estimated for 2006 as no data was collected for this year.												

Source: *Aggregate Monitoring surveys 2006-2015.*

2.1.5 More detailed information on recycled and secondary aggregate, their use; imports, exports and capacity are set out in the Minerals in Hampshire Background Study[8] which was prepared to support the HMWP preparation.

Use of recycled and secondary aggregates

2.1.6 Recycled and secondary aggregates have a growing use in applications such as base layers for new developments and road construction. They can also be used in the production of concrete and other construction materials in addition to other uses such as the creation of children's playgrounds in Hampshire, helping to reduce demand for primary-won (or 'virgin') aggregates. Recycled and secondary aggregate is mainly used as a substitute for land and marine-won sand and gravel. The main markets for such material are broadly the same as those for its primary sourced alternative i.e. areas of greatest demand in Hampshire.

Imports and exports

2.1.7 From evidence obtained through working closely with aggregate operators, it is understood that some small volumes of recycled and secondary aggregate are being imported into, and exported out of Hampshire across the borders with Dorset, Berkshire, Surrey, West Sussex and Devon. More research is required in order to obtain information on volumes. It is assumed that the net balance of imports to and exports from Hampshire of recycled and secondary aggregate by road is nil.

Capacity

2.1.8 The current capacity for recycled aggregate in Hampshire has been identified to be just less than 2.6 million tonnes[9]. This capacity represents the total number of plant/site(s) able to produce recycled aggregate to the standards set out in the Waste and Resources Action Programme (WRAP) Protocol for the Production of Aggregates from Inert Waste[10] (without improvements, assuming maximising working within the constraints of consents and practical considerations). This capacity is significantly greater than past sales over the last 10 years.

2.1.9 It should be noted that the recycling and secondary aggregate producing facilities in Hampshire also produce non-aggregate such as soils or material used for landfill engineering. This material is addressed within this report and not included within the available

[8] Minerals In Hampshire: Background Study
http://documents.hants.gov.uk/mineralsandwaste/HMWP100bMineralsinHampshirev7-SubmissionRevisedFeb2013.pdf
[9] 2015 Aggregates Monitoring Survey information supplied by operators
[10] WRAP Protocol for the Production of Aggregates from Inert Waste:
www.wrap.org.uk/content/quality-protocolproduction-aggregates-inert-waste

capacity. Non-aggregate material produced from these sites for 2015 was approximately 16% of the total amount of secondary and recycled aggregate produced.

2.2 Marine-won Sand and Gravel

2.2.1 Marine-won sand and gravel makes an important contribution to meeting the nation's demand for construction aggregate materials, essential for the development of the built environment. In Hampshire, marine-won sand and gravel is a major source of primary aggregate, and also a principal alternative source to land-won aggregate. It comprises a significant proportion of the total aggregate sold in Hampshire and helps to meet demand for sharp sand and gravel in south Hampshire. Marine-won sand and gravel in Hampshire is dredged primarily from the English Channel and landed at Hampshire's wharves.

2.2.2 National marine policy is contained within the Marine Policy Statement (MPS)[11] which has been prepared and adopted for the purposes of the Marine and Coastal Access Act 2009[12]. This is the framework for preparing Marine Plans and taking decisions affecting the marine environment. Marine Plans will set out how the MPS will be implemented in specific areas.

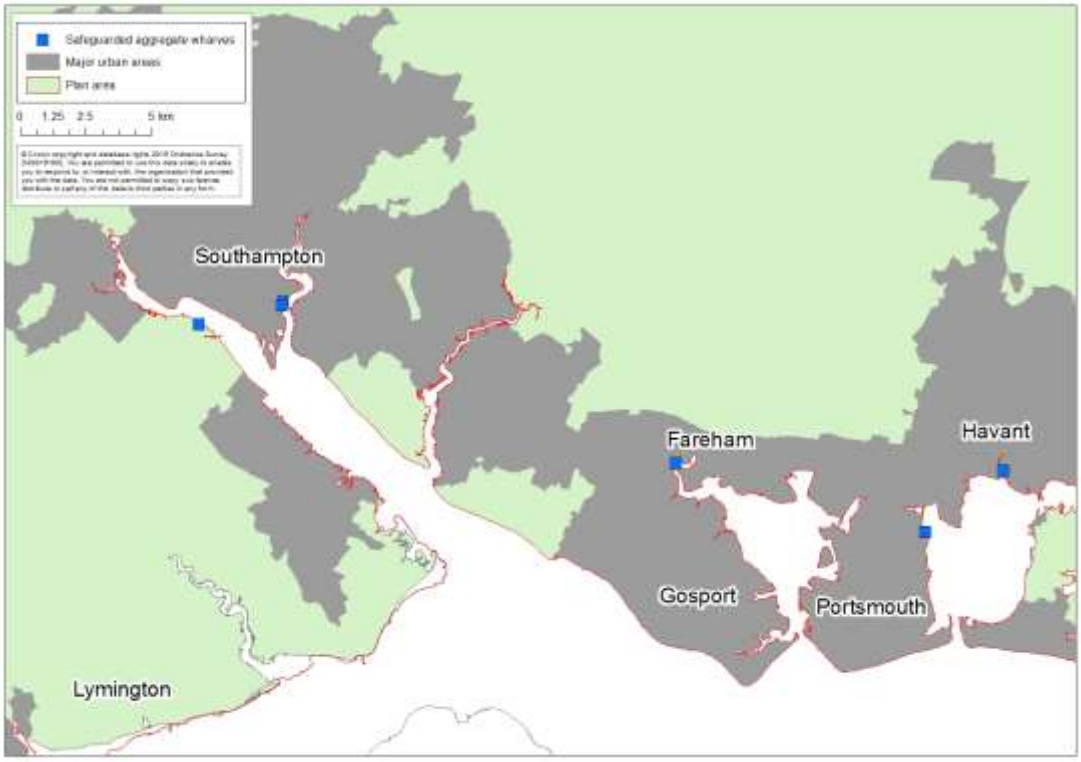
2.2.3 In April 2013, the Marine Management Organisation (MMO) formally started planning in the south inshore and offshore marine plan area. The marine planning team published the South Plans Analytical Report (SPAR) in June 2014[13]. The SPAR summarises the evidence and issues for the south inshore and south offshore marine plan areas. This includes identifying relevant issues and informing the next steps in the planning process, such as generating a vision, objectives and then options. This will also inform the process and production of the marine plans in the south plan areas. The SPAR highlights areas of potential resource for aggregate extraction within the South Plan areas. Within the South Marine Plan's Area (where Hampshire is situated) 38% of sand and gravel demand is met from the Marine Plan's Area, Southampton is the second highest wharf landing area within the Marine Plan's Area at 0.73 mtpa.

2.2.4 Hampshire has seven existing wharves located on the south coast of Hampshire, six of which are active and primarily concentrated in and around the cities of Southampton and Portsmouth. In 2015, five of

[11] UK Marine Policy Statement, HM Government, March 2011: https://www.gov.uk/government/uploads/system/uploads/attachment_data/file/69322/pb3654-marine-policy-statement-110316.pdf
[12] Marine and Coastal Access Act 2009: http://www.legislation.gov.uk/ukpga/2009/23/contents
[13] South Plans Analytical Report: https://www.gov.uk/government/uploads/system/uploads/attachment_data/file/392634/south_spar.pdf

these sold[14] marine-won aggregate. The following map highlights the location of Hampshire's existing aggregate wharves which are the same as those present in 2014.

Figure 2 - Aggregate wharves in Hampshire

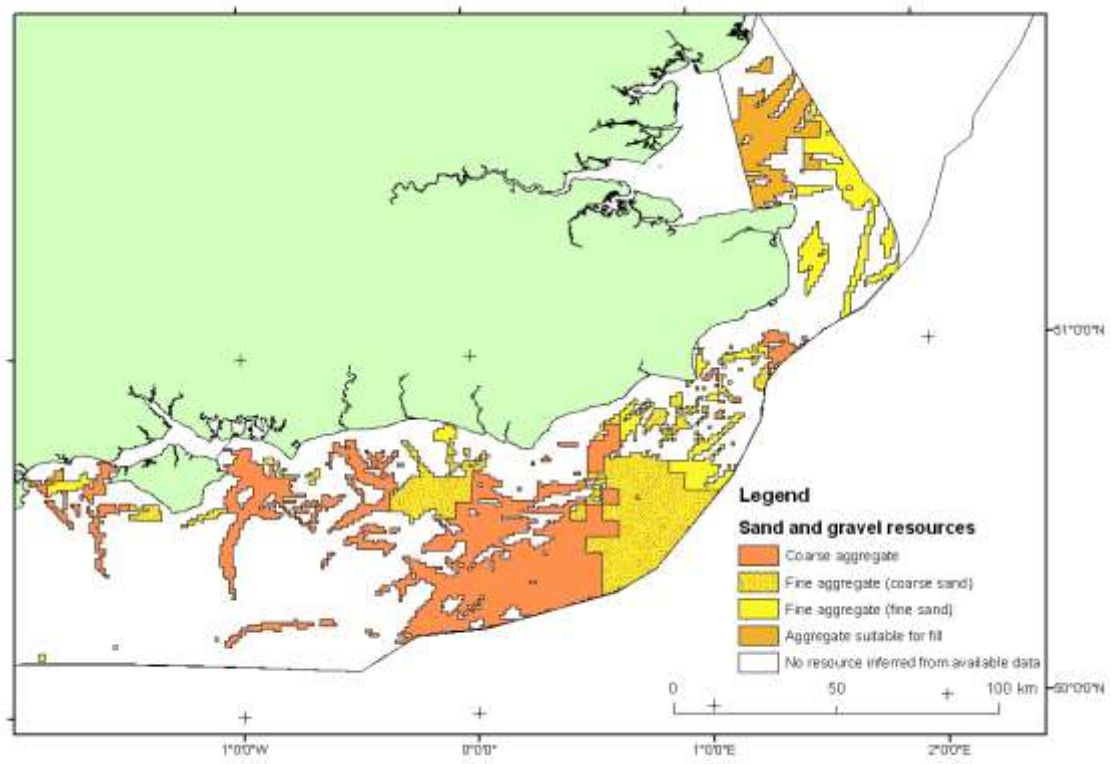


Source: *Hampshire Authorities, 2015*

2.2.5 The mineral rights for marine sand and gravel are owned by the Crown Estate, up to the edge of the continental shelf. There are two dredging regions in proximity to Hampshire: South Coast (including Owers) and the East English Channel. It is understood that there is 97.54 million tonnes (mt) of good quality permitted reserves suitable for primary (construction) aggregate uses in the 'South Coast ' region, and 83.84 mt of good quality permitted reserves suitable for primary (construction) aggregate uses in the 'East English Channel' region. In 2015, Hampshire received 1,454,101 tonnes of its marine-won aggregates from the 'South Coast' region and this was 97.3% of the total dredged marine-won aggregate landed in this year for the county[15]. A map showing the marine mineral resources is shown below.

[14] Some marine dredged aggregate sold may have been from stockpiled material dredged in a previous year.
[15] Crown Estate communication – (2016)

Figure 3 - Detail of sand and gravel resources in the East English Channel and Thames Estuary based on the marine sand and gravel resources of the English Channel and Thames Estuary



Source: *The Crown Estate 2013*

2.2.6 The Crown Estate has indicated that based upon the 10 year average annual extraction rate of 3.77 mt and the licences within the South Coast region, the life expectancy of the good quality primary aggregate reserves, can be assessed as being over 25 years. In 2015, there was 3.33 mt extracted from the South Coast region indicating reserves would last over 29 years at that rate of extraction.

2.2.7 Hampshire receives the majority of its marine aggregate from two dredging regions which have significant unlicensed marine aggregate resources (i.e. not yet technically proven). The Crown Estate commissioned British Geological Survey (BGS) to undertake mineral resource assessments which were published in 2013[16].

2.2.8 The report and map have allowed The Crown Estate to conclude that the technically unproven resources identified here are capable of delivering considerably more than 50 years reserve life at current extraction levels. Any extraction would be subject to the receipt of a Marine Licence[17] from the MMO which would only be granted following completion of an Environmental Impact Assessment, a Coastal Impact Study and consultation exercise, a favourable decision from the MMO and a commercial Production Agreement from The Crown Estate.

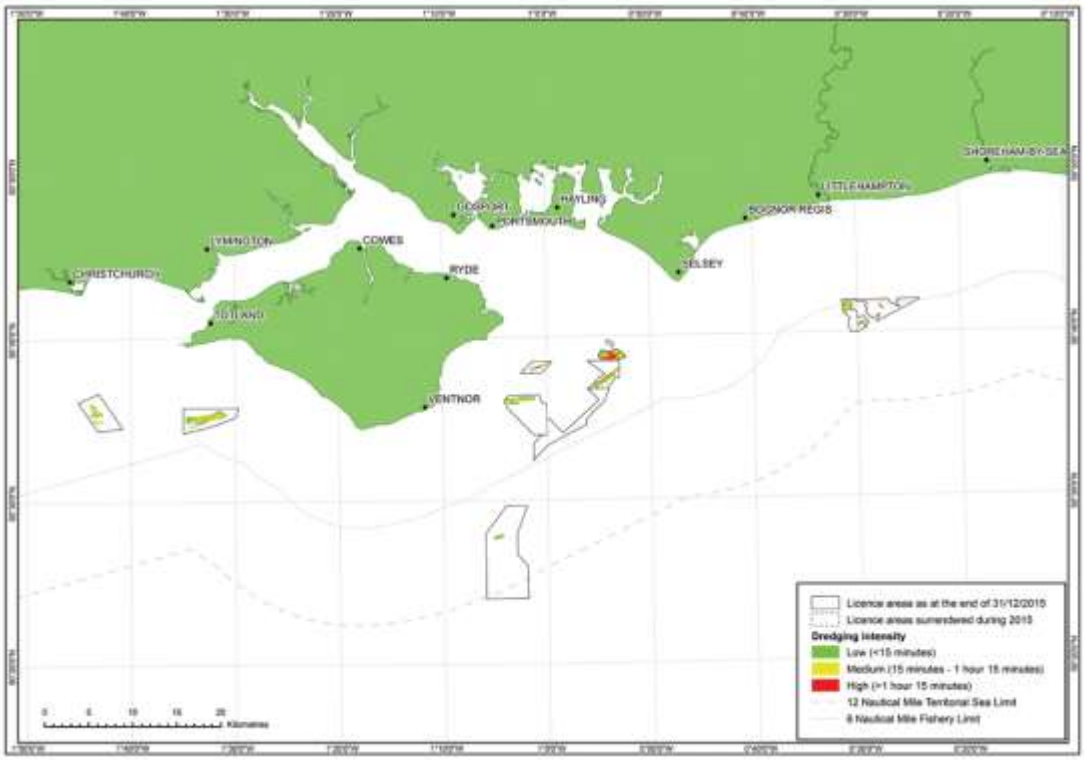
[16] Crown Estate: www.thecrownestate.co.uk/media/5544/ei-bmapa-16th-annual-report.pdf
[17] Marine Licensing -: www.marinemanagement.org.uk/licensing/marine/activities/dredging.htm

2.2.9 There are a total of 27 Production Agreement areas covering 17 discrete areas of seabed that would affect imports to Hampshire. Some areas are non-exclusive so have more than 1 licensee (Production Agreement) on the area;

- East English Channel – 11 Production Agreement areas covering 7 discrete areas of seabed; and,
- South Coast – 14 Production Agreement areas (3 to the west of the Isle of Wight, 9 to the East of the Isle of Wight, and 2 in the Owers sub-region) covering 10 discrete areas of seabed.

2.2.10 Almost all of the Production Agreement Areas within both the South Coast and East English Channel regions have long term Marine Licence permissions in place. The Marine Licences and Production Agreement Areas in the South coast region are shown in the map below:

Figure 4 - Marine Licences and Production Area Areas in the South Coast region (as of December 2015)



Source: *The area involved - 18th Annual Report, 2015 (Crown Estate/MPA)*

2.2.11 More detailed information on marine-won aggregate and their uses, imports, exports and capacity can be found in the *Minerals in Hampshire: Background Study*[18], *Wharves and Rail Depots Study*[19] and *Wharves and Rail Depot Needs Assessment*[20].

[18] HMWP Minerals in Hampshire - Background Study: http://documents.hants.gov.uk/mineralsandwaste/HMWP100bMineralsinHampshirev7-SubmissionRevisedFeb2013.pdf

Sales

2.2.12 The sales figures of marine-won sand and gravel in Hampshire for the most recent 10 year period, 2006 - 2015, are detailed in the following table:

Table 2 - Marine-won sand and gravel landings in Hampshire, 2006-2015 (mt)

Year	2006	2007	2008	2009	2010	2011	2012	2013	2014	2015	Last 3 year average	Last 10 year average
Sales	1.54	1.69	1.44	1.08	1.12	1.17	1.1	1.43	1.36	1.55	1.45	1.35

Source: *Aggregate monitoring surveys 2006-2015*

Use of marine-won aggregate

2.2.13 Most of the marine dredged sand and gravel landed in Hampshire is used as concreting aggregate. During 2015, 3.05 million tonnes of construction aggregate were dredged from a permitted licensed tonnage of 7.38 million. In addition, marine aggregate is, and has been for many years, used as the only viable resource for major beach replenishment schemes. The use of material for beach nourishment is variable from year to year and across regions and licenced areas. It can occur in addition to the primary aggregate off-take but this is not a regular occurrence. In 2015, 100,000 tonnes[21] from the South Coast dredging region was used for beach replenishment. However, it is important to note that tonnage may have been delivered to other parts of south east England and to mainland Europe.

2.2.14 It is understood that most of the aggregate landed at Hampshire's wharves is transferred to markets within 25 miles but in some instances this can be greater. This evidence is based on discussions with Hampshire's wharf operators[22]. It is also understood that the Isle of Wight is dependent upon the Hampshire wharves and/or the Port of Southampton for a small part of its aggregate supply.

Imports and exports

2.2.15 Marine-won sand and gravel is imported to and then exported from Hampshire. Figures have been obtained from the AM2014 for the

[19] HMWP Wharves and Rail Depots Study: http://documents.hants.gov.uk/mineralsandwaste/HMWP125WharvesandRailDepotsStudyv4-SubmissionFeb2012.pdf
[20] HMWP Assessment of need for wharves and rail depots in Hampshire: http://documents.hants.gov.uk/mineralsandwaste/HMWP012WharvesandRailDepotsupdateFINALFeb2011.pdf
[21] Crown Estates: https://www.thecrownestate.co.uk/media/883245/bmapa_18th_annual_report.pdf
[22] HMWP Wharves and Rail Depots Study: http://documents.hants.gov.uk/mineralsandwaste/HMWP125WharvesandRailDepotsStudyv4-SubmissionFeb2012.pdf

imports and exports of sand and gravel, including marine and land-won material. These are shown in table 7 in section 2.4 ‘Land-won Sand and Gravel’.

Capacity

2.2.16 The *Wharves and Rail Depot Needs Assessment*[23] identified an estimated maximum capacity of existing aggregate wharves to handle marine-won sand and gravel. This estimated capacity of 2.21 mt is potentially available and shows that there is currently spare capacity available at marine aggregate wharves when compared to sales over the past 10 years. However, there has been an estimated decrease in wharf capacity of 0.35 mtpa and there is also continued increasing pressure on wharf operations by surrounding infrastructure and regeneration developments which has the potential to jeopardise future imports.

2.2.17 This maximum capacity was identified through conversations with the existing operators of the facilities on issues such as existing infrastructure, transport and operating systems deployed at each site. The capacities were made to reflect what might be possible at the sites should a return to high aggregate demand occur during the HMWP period i.e. in excess of the highest marine and other aggregate imports reported in 1989. Additional future capacity for aggregate wharves is discussed in section 4. 'Future Aggregate Supply, Demand, Opportunities and Constraints' of this LAA.

2.3 Hard Rock

2.3.1 Hampshire does not have any natural hard rock resources and therefore relies on imports of hard rock such as limestone and granite in order to meet demand for this type of aggregate.

2.3.2 Historically, imports of limestone into Hampshire have been made by rail (from Somerset and Cornwall), and this continues to be the main method for importation.

2.3.3 Imports of granite are now mainly supplied from the Isle of Grain in Kent and are transported by rail.

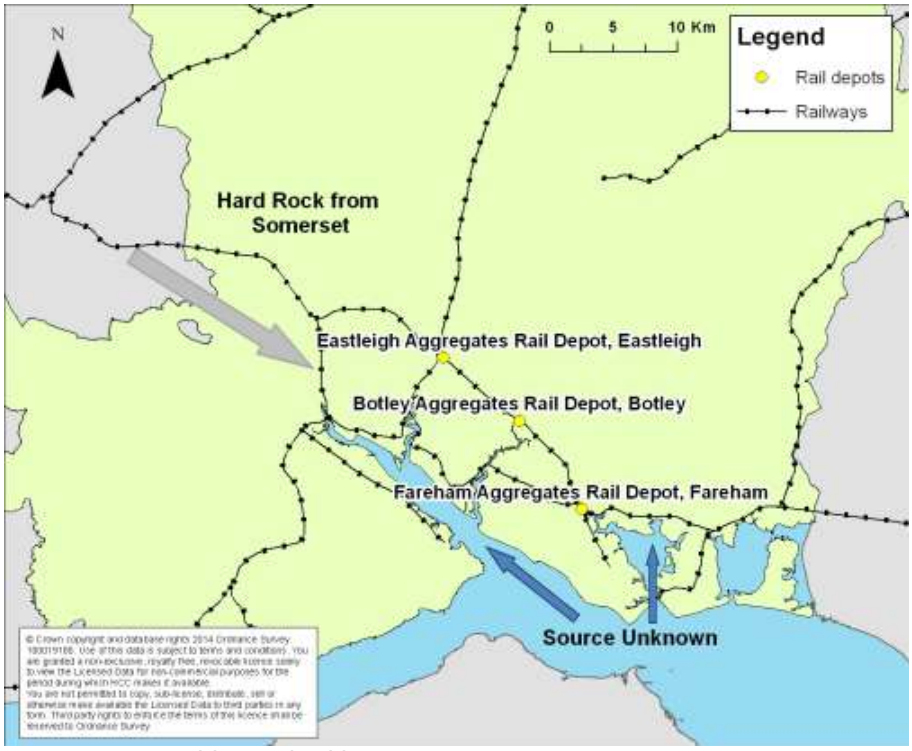
2.3.4 Associated British Ports (the operator of the Port of Southampton) believes there is now insufficient capacity at the Port of Southampton for hard rock aggregate imports.

[23] HMWP Assessment of need for wharves and rail depots in Hampshire: http://documents.hants.gov.uk/mineralsandwaste/HMWP012WharvesandRailDepotsupdateFINALFeb2011.pdf

Imports and sales

2.3.5 Limestone is largely imported into Hampshire from quarries situated in the Mendip Hills in Somerset by rail directly to three aggregate rail depots located in the south of the county at Botley, Eastleigh and Fareham. These rail depots are highlighted in the following map.

Figure 5 - Hampshire Aggregate rail depots



Source: *Hampshire Authorities, 2015*

2.3.6 In addition to rail imports, a similar amount of hard rock is also imported into Hampshire by road. It is understood that these imports of hard rock are initially delivered by rail to depots outside of Hampshire, predominantly Theale (near Reading) in Berkshire, and Poole in Dorset, before then being imported from these depots into Hampshire by road.

2.3.7 Somerset County Council confirmed that they do not perceive any likely issues to impact upon the future supply of hard rock to Hampshire. Cornwall Council confirmed that there were no known issues which would impact the future supply of hard rock from Cornwall to Hampshire.

2.3.8 The hard rock sales (from rail and sea imports) in Hampshire for the most recent 10-year period, 2006 - 2015, are detailed in Table 3. Figures for hard rock imports by road are only available for 2009 and 2014 and so are not included in Table 3.

Table 3 - Hard rock sales in Hampshire, 2006 - 2015 (mt)

Year	2006	2007	2008	2009	2010	2011	2012	2013	2014	2015	Last 3 year average	Last 10 year average
Sales	0.77	0.54	0.59	0.35	0.36	0.33	0.28	0.39	0.46	0.46	0.44	0.45

Source: *Aggregate Monitoring surveys 2006 – 15*

2.3.9 In terms of exports of crushed rock these are technically zero, since Hampshire does not have its own source of crushed rock that it can export. However, from dialogue with the BGS it is understood that a small amount of rail imported crushed rock that arrives at the Hampshire rail depots, is then sold on outside of Hampshire via road exports, thus mirroring the process for Hampshire's imports by road.

Use of hard rock

2.3.10 Historically, limestone and granite have been imported into the county for use in roadstone and rail ballast respectively.

Capacity

2.3.11 An assessment of wharf and rail depot capacity[24] was undertaken to support the HMWP. The assessment sets out the wharf and rail depot capacities to handle hard rock, as outlined in Table 4.

Table 4 - Maximum import capacity of hard rock at existing Hampshire facilities

Import facility	Annual capacity (mt)
Wharves	0.15
Rail Depots	1.10
Total	**1.25**

Source: *Assessment of Need for Wharves and Rail Depots in Hampshire – (Land and Mineral Management, September 2009)*

2.3.12 As with identifying capacities for marine-won sand and gravel, these maximum capacities were identified through conversations with the existing operators of the facilities of infrastructure, transport and operating systems deployed at each site. The capacities were made to reflect what might be possible at the sites should a return to high aggregate demand occur during the Plan period (up to 2030) i.e. in excess of the highest marine and other aggregate imports reported in 1989.

2.3.13 Table 4 above shows rail depot capacity to be significantly above the level of sales over the past 10 years, however this is restricted to three depots all based in the south of Hampshire. In contrast, current

[24] HMWP Assessment of need for wharves and rail depots in Hampshire: http://documents.hants.gov.uk/mineralsandwaste/HMWP012WharvesandRailDepotsupdateFINALFeb2011.pdf

capacity for the import of hard rock by sea has been identified to be very limited, although still in excess of what is currently understood to be imported which is very minimal. Additional future capacity for both types of infrastructure is discussed in section 4. 'Future Aggregate Supply, Demand, Opportunities and Constraints'.

2.4 Land-won Sand and Gravel

2.4.1 In Hampshire, recycled and secondary aggregate, marine-won sand and gravel and the importation of aggregate can substitute local land-won extraction to a certain degree, but not entirely, meaning that there is still a need to plan for local land-won extraction. Locally won sand and gravel are Hampshire's most widely worked minerals.

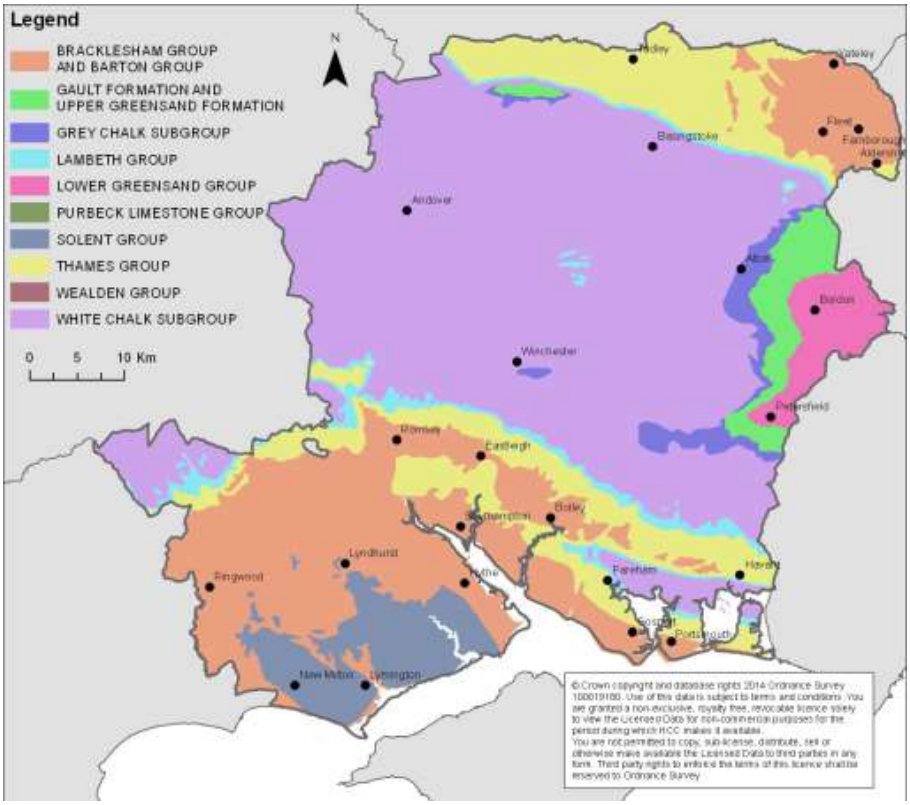
Geology of Hampshire

2.4.2 Hampshire can be divided broadly into four main geological areas:

- *Chalk Downlands* - a broad belt of deep chalk deposits runs east to west across the centre of the county, with two smaller deposits in the south east and the west;
- *Hampshire Basin* - in the southern part of the county the chalk dips beneath younger deposits of silts, sands and clays;
- *London Basin* - similar geological deposits to those found in the Hampshire Basin occur in the north of the county; and
- *Wealden Edge* - in the eastern part of the county the chalk has been eroded to expose older geological deposits of clays, sands and sandstones which form the western end of the Weald.

2.4.3 The following map shows the simplified representation of the geology of Hampshire.

Figure 6 - Simplified geology of Hampshire



***Source**: Hampshire Authorities, 2015*

2.4.4 In terms of aggregates, Hampshire's geology gives rise to the following aggregate deposits of economic importance:

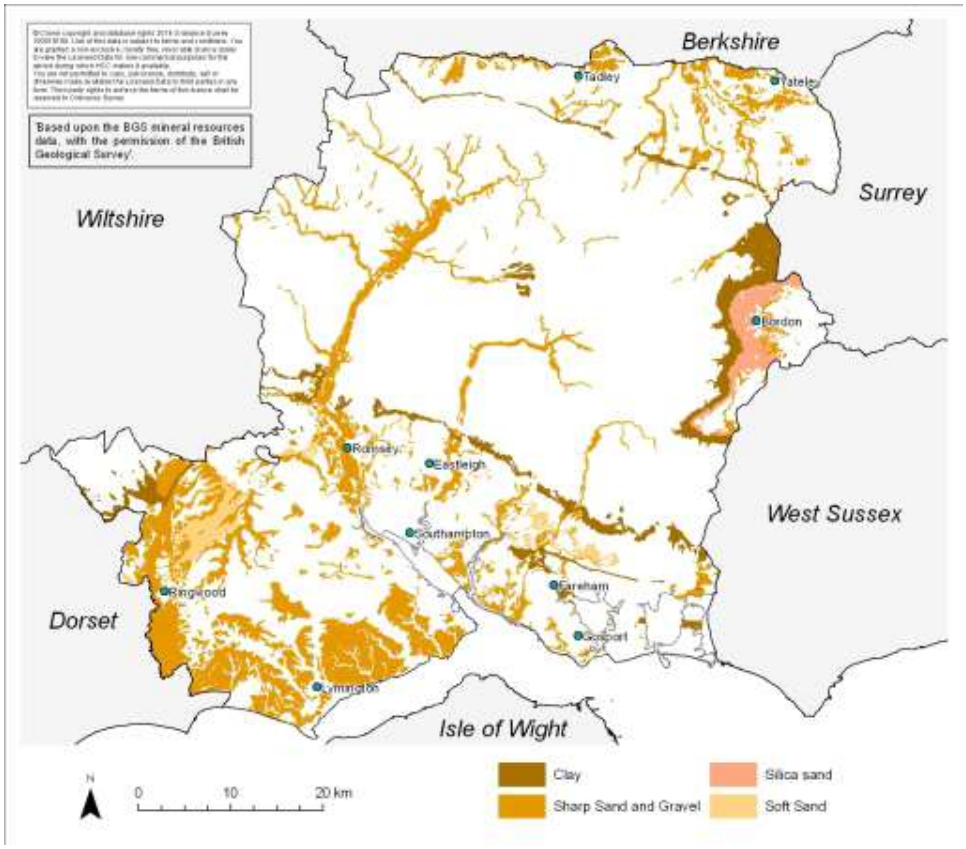
- sharp sand and gravel;
- soft sand; and
- Silica sand.

2.4.5 Sand and gravel deposits occur as 'lower terrace' deposits, particularly in the Avon, Test, Itchen and Blackwater river valleys. They also occur as 'upper terrace' gravels, which are present within parts of the London and Hampshire Basin areas. These are generally north-east and south-west Hampshire, and include areas in the Ringwood Forest, adjacent to the Hampshire coast, around Southampton Water, near Romsey, and in the Yateley area. Soft sand occurs within the Wealden Edge area (near Bordon in East Hampshire) and at locations within the Hampshire Basin, in Ringwood Forest, around Romsey and Fair Oak, near Eastleigh.

2.4.6 Evidence submitted as part of the public hearings of the HMWP indicated that resources on the edge of the Folkstone beds in east Hampshire have properties consistent with silica sand uses.

2.4.7 The following map shows the broad location of minerals of economic importance in Hampshire.

Figure 7 - Minerals of economic importance in Hampshire



Source: *Hampshire Authorities, 2015*

2.4.8 Historically, much of Hampshire's land-won aggregate production has come from south-west Hampshire (west of Lymington) and from the Avon Valley (north of Ringwood). Smaller, yet still significant production areas have also been located in north east Hampshire and south Hampshire.

2.4.9 Production in south Hampshire has fallen significantly in recent years, reflecting the depletion of available resources resulting from closure of extraction sites at Netley, near Southampton, Warsash near Fareham and on the Gosport peninsular. Increased availability of alternative sources of aggregate, such as rail and marine dredged imports and recycled and secondary aggregates has helped address this fall of land-won production.

2.4.10 In comparison, production has correspondingly increased from the south-west Hampshire, which has traditionally supplied sand and gravel to west Hampshire, Bournemouth and Poole market areas. Meanwhile, in north-east Hampshire, production has remained largely steady over recent years.

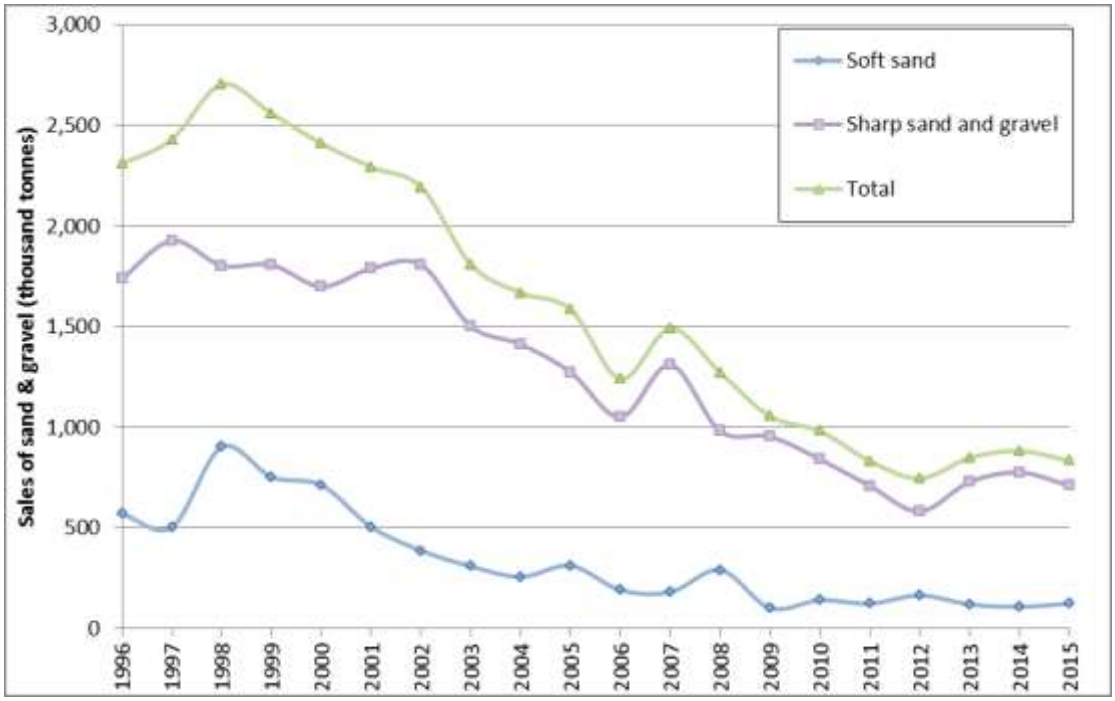
2.4.11 In terms of soft sand, reserves in Hampshire are very scarce and are concentrated in a small number of areas. In contrast, sharp sand and gravel is more widely distributed.

2.4.12 More information on Hampshire's geology can be found in the *Joint Baseline Report*[25] and *Minerals in Hampshire: Background Study*[26] as well as the *Soft Sand Topic Paper*[27] which were published in support of the HMWP preparation.

Hampshire Sales

2.4.13 Sales of primary, or land-won aggregate which originated in Hampshire over the 20-year period from 1996 - 2015 are shown in the following graph. Total sales are shown divided between sharp sand and gravel and soft sand. Please note, aggregate sales prior to 2013 may include a small amount of silica sand (non-aggregate).

Figure 8 - Sales of land-won sand and gravel in Hampshire, 1996 - 2015



Source: *Aggregate Monitoring surveys 1996 - 2015*

2.4.14 Sales during this period can be seen to be on a predominant downward trend from 1998 onwards. However, total sales did increase in 2007, 2013 and 2014. 2015 sales have decreased which may indicate a return to the overall trend.

[25] HMWP - Joint Baseline Report: http://documents.hants.gov.uk/mineralsandwaste/HMWPSPGJointBaselineReport2014V1October2014.pdf

[26] HMWP - Minerals In Hampshire - Background Study:, http://documents.hants.gov.uk/mineralsandwaste/HMWP100bMineralsinHampshirev7-SubmissionRevisedFeb2013.pdf

[27] HMWP - Soft Sand Topic Paper: (http://documents.hants.gov.uk/mineralsandwaste/HMWP123SoftSandTopicPaper-Final-SubmissionFeb2012.pdf

2.4.15 Sales of sharp sand and gravel mirror total sales closely (as sharp sand and gravel forms the majority of land-won sales in Hampshire) and have steadily declined since 1998, with a relatively sharp decline from 2002. Land-won aggregate sales steadily increased over 2013 and 2014 but the trend of decreased sales has been shown for 2015. Soft sand sales show a much more gradual decline since 1998, almost plateauing during the mid-2000s, before a slight increase in 2008 and 2010, before declining again in 2011. In 2012, a slight increase in sales of soft sand (including silica sand) was recorded, followed by decreasing sales. However, in 2015 a slight increase in soft sand sales was recorded once again.

2.4.18 The sales figures of sand and gravel in Hampshire for the most recent 10 year period are detailed in Table 5. A 10 year period has been adopted in line with the approach detailed in the NPPF[28]. It is argued that this period is sufficiently long enough to incorporate years of both high (2006 - 2008) and low (2009 - 2012) economic activity and therefore provides a realistic average period. The following table shows land-won sales over the 10 year period from 2006-2015 (please note, sales of silica sand are not represented in Table 5).

Table 5 - Land-won sand and gravel sales in Hampshire, 2006 - 2015 (mt)

Year	2006	2007	2008	2009	2010	2011	2012	2013	2014	2015	Last 3 year average	Last 10 year average
Sales	1.24	1.49	1.27	1.05	0.98	0.83	0.75	0.85	0.88	0.83	0.85	1.02

Source: Aggregate Monitoring surveys 2006 - 2015

2.4.19 The 10 year average for 2015 has decreased since 2014 by 0.07 mt, this drop is accounted for by the absence of 2005 land-won sales figures within the 10 year average. The 2005 sales were 1.58 mt, this was a significantly high year for sand and gravel sales.

2.4.20 It is acknowledged that resources at Kingsley and Frith End quarries have properties with silica sand uses. Historical data identified the quarries as sources of soft sand only. This means that the sites are included in the data represented above for soft sand. As only two sites provide sales data for silica sand, for reasons of commercial confidentiality, sales data can only be published as a three year average. For the period 2013-2015, the 3-year sales average for silica sand in Hampshire was 73,285 tonnes. This is an increase from the previous 3-year average (2012-2014) of 63,317 tonnes. An increase in non-aggregate sales at Frith End and Kingsley is likely to lead to a more rapid depletion of soft sand reserves as resources at these locations can be classed as both soft sand and silica sand. More

[28] National Planning Policy Framework, paragraph 145 (DCLG, 2012): http://planningguidance.planningportal.gov.uk/blog/policy/achieving-sustainable-development/delivering-sustainable-development/13-facilitating-the-sustainable-use-of-minerals/

information on soft sand and silica sand supply options is set out in the 'Minerals in Hampshire' Report[29].

2.4.21 The pattern of declining land-won aggregate sales in Hampshire mirrors that of the South East region, which have declined from a total of 12.8 million tonnes (mt) in 1996[30] down to 5.5 mt in 2015[31]. This represents a decline of 57% during this period, compared with a fall in Hampshire's sales from 2.31 mt[32] to 0.83 mt representing a 64% decrease in Hampshire during the same period.

Current supply

2.4.22 The current supply of land-won aggregate in Hampshire is provided from 12 permitted sand and gravel extraction sites. The details of those sites are presented in Table 6.

Table 6 - Permitted sand and gravel quarries in Hampshire

Site	Operator	Aggregate			Status
		SS & G**	Soft Sand	Silica Sand	
Avon Tyrell, Ripley	New Milton Sand & Ballast	✓			Inactive
Blashford Quarry, Ringwood	Lafarge Tarmac	✓	✓		Active
Bleak Hill Quarry, Ringwood Forest	CEMEX	✓	✓		Active
Bramshill Quarry, Eversley	CEMEX	✓			Active
Chandlers Farm, Eversley	CEMEX	✓			Inactive
Downton Manor Farm, Milford on Sea	New Milton Sand and Ballast Sharp	✓			Active
Fawley Quarry, Fawley	CEMEX	✓	✓		Active
Frith End Quarry, Sleaford	Grundon		✓	✓*	Active
Kingsley Quarry, Kingsley	Lafarge Tarmac		✓	✓*	Active
Marchwood Quarry, Marchwood	Marchwood Aggregates	✓			Active
Mortimer Quarry, Mortimer West End	Hanson	✓			Inactive
Roke Manor Quarry, Shootash	Raymond Brown Aggregates	✓			Active
* Resources have been traditionally identified as soft sand. These resources can now be classified as silica sand as well as soft sand. ** Sharp Sand and Gravel					

Source: *Aggregates Monitoring Survey 2015*

[29] HMWP – Minerals in Hampshire: http://documents.hants.gov.uk/mineralsandwaste/HMWP100bMineralsinHampshirev7-SubmissionRevisedFeb2013.pdf

[30] 2004 South East England Aggregates Monitoring Report: https://www.bipsolutions.com/docstore/pdf/15209.pdf

[31] 2015 South East England Aggregates Monitoring Report

[32] HMWP - Minerals In Hampshire - Background Study:, http://documents.hants.gov.uk/mineralsandwaste/HMWP100bMineralsinHampshirev7-SubmissionRevisedFeb2013.pdf

2.4.23 The locations of the sites listed in Table 6 in relation to designated areas are shown in Figure 9.

Figure 9 - Location of Hampshire's permitted sand and gravel sites

Source: *Hampshire Authorities, 2016*

2.4.24 At 31 December 2015, these 12 sites represented a total sand and gravel reserve of approximately 11.5 million tonnes and in 2015, a total of 0.83 million tonnes of sand and gravel was sold from them. It is noted that Bramshill Quarry estimates that the remaining reserves suitable for extraction for the site total 900,000 tonnes. This is less than the permitted reserve as phase 6 has been found to be unsuitable for extraction[33].

Use of local land-won aggregate

2.4.25 Sand and gravel resources across Hampshire are used as:

- an aggregate;
- a material to make concrete;
- concrete products;
- cement in other building material uses; and
- a constructional base material or fill.

2.4.26 Unwashed or as-raised sand and gravel is commonly used as constructional fill material and also for surfacing tracks and paths.

[33] https://planning.hants.gov.uk/ApplicationDetails.aspx?AppNo=14/00063/CMA

Hampshire imports and exports

2.4.27 As well as producing sand and gravel for use within the County, Hampshire also imports and exports sand and gravel from/to surrounding Mineral Planning Authority areas.

2.4.28 Historically, sand and gravel has been imported into Hampshire predominantly from the west (Dorset, Poole/ and Bournemouth) and from the north (Berkshire), and exported predominantly to the south west (Dorset), west (Wiltshire) and north (Berkshire). However, tracking imports and exports has been a longstanding issue.

2.4.29 The 2014 Aggregate Monitoring Survey undertaken jointly between DCLG and the BGS provided broad land-won and marine-won sand and gravel import and export figures for MPA areas. The data within AM2014 along with additional information obtained through direct correspondence with the BGS has enabled Hampshire's sand and gravel imports/exports to be identified by origin/destination and to be calculated. The following table highlights imports to, and exports from Hampshire based upon the survey findings.

Table 7 - Land-won and marine-won sand and gravel imports to and exports from Hampshire, 2014

Region	Origin	Imports into Hampshire (thousand tonnes)	Exports from Hampshire (thousand tonnes)	Balance (thousand tonnes)
South east	Berkshire Unitaries	<40	113	-93
	Surrey	0	50	- 50
	West Sussex	101	66	+ 35
	Isle of Wight	101	Unknown	Unknown
South west	Wiltshire & Swindon	101	92	+ 9
	Dorset	101	120	- 19
Total		444.	441	+3
Note: In balance column, a '-' prefix indicates a net export, and a '+' prefix indicates a net import.				

Source: *Aggregate Minerals Survey 2014 / British Geological Survey.*

2.4.30 The 2014 data indicates that Hampshire was a net exporter of marine and land-won sand and gravel. The largest movements occurred between West Sussex, Dorset and Wiltshire & Swindon. Historically there have always been significant aggregate flows with these authorities due to the number of quarries located near to the relevant minerals planning authority boundaries. Net imports also occur from a number of authorities.

Long-term capacity

2.4.31 As at 31 December 2015, Hampshire had permitted sand and gravel reserves of 11.4 million tonnes, as calculated from the AM2015 survey. To provide a more up-to-date reserve, an estimate has also been calculated for the end of 2016, which takes into account any additional reserves permitted in 2016 minus the estimated sales during 2016.

2.4.32 The landbank is the number of years of reserves remaining at an annual rate of aggregate supply[34] this is shown for Hampshire in Table 8 at both the actual and estimated reserves based upon the locally derived aggregate provision (local requirement) and the following three sale periods:

- 2006 - 2015 average sales (10 year average) of 1.02 million tonnes per annum;
- 2013 - 2015 average sales (3 year average) of 0.85 million tonnes per annum; and
- 2015 sales of 0.83 million tonnes per annum.

Table 8 - Hampshire landbank (years)

	Permitted Reserve (million tonnes)	Date (when permitted reserve recorded)	Landbank based upon Local Requirement (years)***	Landbank based upon 10yr Average sales between 2006-2015 (years)	Landbank based upon 3yr Average sales between 2013-2015 (years)	Landbank based upon 2015 Sales (years)
SS&G**	**9.9**	**31.12.2015**	**7.7**	**11.5**	**13.4**	**13.9**
SS&G 2016* (estimated)	9.2	02.09.2016	7.2	10.7	12.4	12.9
Soft Sand	**1.5**	**31.12.2015**	**5.4**	**10.0**	**12.5**	**12.5**
*Silica Sand****	*c*	*31.12.2015*	*c*	*c*	*2.9*	*2.7*
Soft Sand 2016* (estimated)	1.4	02.09.2016	4.9	9.2	11.5	11.5
Total	**11.4**	**31.12.2015**	**7.3**	**11.2**	**13.4**	**13.7**
Total 2016* (estimated)	10.6	02.09.2016	6.8	10.4	12.4	12.7
	* Based upon the same level of sales as the previous year and any new permissions ** Sharp Sand and Gravel *** Local Requirement for SS&G – 1.28, Soft Sand – 0.28, Total – 1.56 (mtpa) ****Please note that the Silica Sand landbank is incorporated into the Soft Sand landbank as the resources can be classed as either Soft Sand or Silica.					

Source: *Aggregates Monitoring Surveys and Hampshire Minerals & Waste Plan (2013)*

2.4.33 Additional capacity for land-won aggregate is discussed in section 4.'Future Aggregate Supply, Demand, Opportunities and Constraints' of this LAA.

[34] The current apportionment figure is 1.56 mtpa. The previous proposed (regional) apportionment for Hampshire was 2.05mtpa which was lower than that prescribed in The South East Plan (2009) of 2.61mtpa. The lower regional apportionment figure was described in the Proposed Changes to Policy M3 of the South East Plan.: http://webarchive.nationalarchives.gov.uk/20100528142817 / www.gos.gov.uk/gose/planning/regionalPlanning/798061/?a=42496

3. Total Aggregate Supply

3.1 As discussed in Section 2. 'Aggregates in Hampshire' the supply of aggregates in Hampshire is based on a balanced supply arising from different sources: recycled and secondary aggregate, marine-won aggregate, imported crushed rock and land-won sand and gravel. This supply ensures that reliance is not placed on any one source. Table 9 below presents sales information of each aggregate source in Hampshire.

Table 9 - Total Aggregate Sales in Hampshire, 2006 - 2015 (mt)

Aggregate \ Year	2006	2007	2008	2009	2010	2011	2012	2013	2014	2015	3 year average 2013-15	10 year average 2006-15
Recycled and Secondary	0.62*	0.55	0.64	0.60	0.79	0.93	0.81	0.93	1.11	0.99	1.01	0.82
Marine-won: Sand and gravel	1.54	1.69	1.44	1.08	1.12	1.17	1.10	1.43	1.36	1.55	1.45	1.35
Imports**: Crushed rock	0.77	0.54	0.59	0.35	0.36	0.33	0.28	0.39	0.46	0.46	0.44	0.45
Land-won: Sharp sand and gravel	*1.05*	*1.31*	*0.98*	*0.94*	*0.83*	*0.71*	*0.59*	*0.73*	*0.76*	*0.71*	*0.73*	*0.86*
Land-won: Soft sand	*0.19*	*0.18*	*0.29*	*0.11*	*0.14*	*0.12*	*0.16*	*0.12*	*0.11*	*0.12*	*0.12*	*0.15*
Land-won: Sub-total	1.24	1.49	1.27	1.05	0.98	0.83	0.75	0.85	0.88	0.83	0.85	1.02
Total	**4.17**	**4.27**	**3.94**	**3.08**	**3.24**	**3.26**	**2.94**	**3.60**	**3.80**	**3.83**	**3.74**	**3.63**
* Estimated figure												
** It is recognised that crushed rock is also imported into Hampshire by road.												

Source: *Aggregate Monitoring surveys 2006 - 15*

3.2 As shown through Table 9 above there has been a slight increase in aggregate sales in 2015. Land-won sales have decreased in Hampshire which is also reflected in sales in the wider region, as reported in the 2015 South East England Aggregates Monitoring Report.

3.3 Following a slight decrease in marine aggregate production in 2014, sales increased in 2015 to the highest level since 2007. Sales for 2015 were above the last 3 and 10 year average levels. Recycled aggregate sales have decreased following a significant increase in 2014. Imports of crushed rock have remained the same for 2015 as 2014, these figures being above the 3 and 10 year averages.

3.4 Table 10 below summarises a comparison of the different levels of contribution from each aggregate source in the form of 3 year and 10 year averages as well as 2015 sales data.

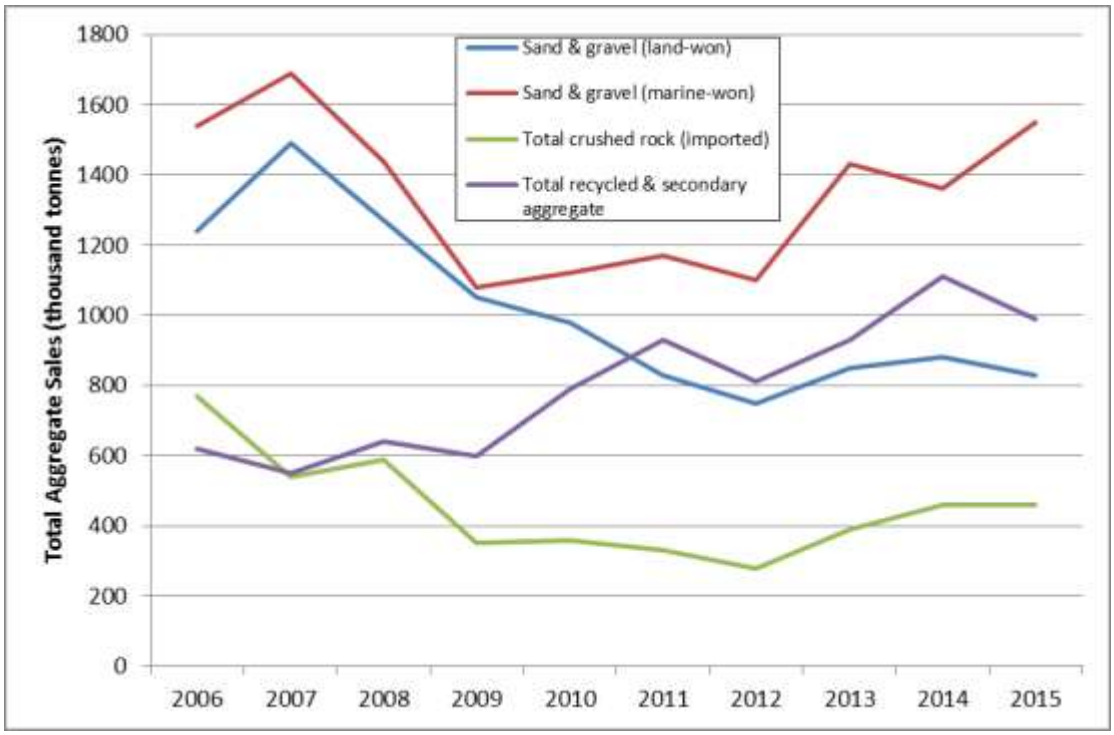
Table 10 - Comparison of Aggregate Sales in Hampshire in 2015 with the 3 year and 10 year averages (percent)

Aggregate	2015	3 year average	10 year average
Recycled and Secondary aggregate	26	27	23
Imports: Crushed rock	12	12	12
Marine-won: Sand and gravel	40	39	37
Land-won: Sand and gravel	22	23	28
Total*	**100%**	**100%***	**100%**
*Due to rounding this figure is not exactly 100%			

Source: *Aggregate Monitoring surveys 2006 - 2015*

3.5 The following graph compares the total supply of each aggregate source over time represented in the table above.

Figure 10 - Total Aggregate Supply in Hampshire, 2006 - 2015



Source: *Aggregate Monitoring Surveys 2006 – 2015*

3.6 The following table provides a comparison of the 10 year average sales total for each aggregate source against the identified capacity for that source to identify where additional provision may be required, or where contingency capacity is available.

Table 11 - Comparison of average aggregate sales against identified annual capacity in Hampshire

Type/source of aggregate	Average annual sales (2006-15) (million tonnes)	Planned Provision (million tonnes)	Surplus annual capacity (million tonnes)
Recycled and Secondary aggregate	0.82	2.57	1.75
Imports: Crushed rock	0.45	1.25	0.80
Marine-won: Sand and gravel	1.35	2.21*	0.86
Land-won: Sand and gravel	1.02	1.56**	0.54
Total	**3.64**	**7.59**	**3.95**
** Assessment of Need for Wharves and Rail Depots in Hampshire - Land and Mineral Management, September 2009*			

Source: *Aggregate Monitoring surveys 2006 - 2015 and **Hampshire Minerals & Waste Plan (2013)*

3.7 In respect to land-won sand and gravel, the capacity identified in the HMWP is currently more than sufficient to meet the locally derived provision of 1.56 mtpa and has therefore been "capped" at the same level.

3.8 Recycled and secondary aggregate sales decreased in 2015, despite an increased level of capacity of 0.16 mt. This has mainly been attributed to an increase in operational capacity.

3.9 Wharf capacity has remained the same as 2014 levels with no wharves lost or gained during 2015.

3.10 There is a significant amount of available alternative infrastructure capacity for aggregate in Hampshire that is considered to be more than sufficient to meet Hampshire's needs to 2030. This is discussed further in section 4. 'Future Aggregate Supply, Demand, Opportunities and Constraints'.

4. Future Aggregate Supply, Demand, Opportunities and Constraints

4.1 Future Aggregate Supply

4.1.1 The Managed Aggregate Supply System (MASS) guidance[35] recognises the principles of planning for a steady and balanced supply of aggregates, as well as the need to determine aggregate provision through a Local Aggregate Assessment (LAA). This LAA covers those areas set out within the guidance, as described in the Introduction of this report.

4.1.2 The approach taken by the Hampshire Authorities and the SDNPA in preparing the HMWP and planning for land-won aggregate supply over the period up to 2030, is based on the principle that future supply should be based on past average sales. This meets the requirements of the NPPF[36] which states that:

'minerals planning authorities should plan for a steady and adequate supply of aggregates by preparing an annual Local Aggregate Assessment, either individually or jointly by agreement with another or other mineral planning authorities, based on a rolling average of 10 years sales data'.

.

4.1.3 The most recent 10 year period of sales (2006 - 2015) for Hampshire would give a land-won sand and gravel provision of 1.02 million tonnes per annum (mtpa). The annual level of supply, based on 10 year average sales, will vary year on year. As identified in Total Aggregate Supply the locally derived provision of 1.56 mtpa in the HMWP is above the current level of average sales.

Are changes to aggregate supply likely?

4.1.4 It is not anticipated that there will be any significant changes to the level of supply in the short to medium term. However, the annual monitoring of the HMWP policies will consider the issue of supply vs demand. Monitoring triggers (thresholds) for policy review are included in Appendix C (Implementation & Monitoring Plan) of the HWMP in relation to *Policy 17 (Aggregate Supply - capacity and source)* and are set as follows:

[35] Guidance on Managed Aggregate Supply System: https://www.gov.uk/government/uploads/system/uploads/attachment_data/file/14721/2238394.pdf

[36] National Planning Policy Framework, paragraph 145: https://www.gov.uk/government/uploads/system/uploads/attachment_data/file/6077/2116950.pdf

- *aggregate production capacity reduced by more than 556,000 tpa (10% of 5.56 mtpa); and*
- *local land-won aggregate sales exceed 1.56 mtpa.*

4.1.5 *Policy 20 (Local land-won aggregates)* also ensures an adequate and steady supply of locally extracted sand and gravel will be provided by maintaining a landbank of permitted sand and gravel reserves sufficient for at least seven years. The monitoring trigger for policy review is also included within Appendix C of the HMWP and is set as follows:

- *Landbank falls below 7 years worth of aggregate supply.*

4.1.6 More detailed information on Hampshire's local aggregate provision approach is provided in the *Minerals in Hampshire - Background study*[37].

4.1.7 This LAA shows that none of the monitoring thresholds have been triggered in 2015, therefore Hampshire is ensuring a steady and adequate supply of local aggregates.

4.2 Future Aggregate Demand

4.2.1 The monitoring and reporting of annual sales of sand and gravel has historically been undertaken through the annual Aggregate Mineral Surveys. These surveys collect and collate confidential sales data from all active sand and gravel sites. As a secondary source, the Government's Annual Mineral Raised Inquiry (AMRI) surveys can also be used. The most up to date AMRI report[38] was published in March 2016 based on 2014 aggregate sales data on a national scale.

Infrastructure

4.2.2 At the current time there are a number of approved significant urban extensions planned at Whitehill & Bordon, North Whiteley, Manydown, Welborne and Aldershot. Significant urban regeneration and development projects are also coming forward in the two cities of Southampton and Portsmouth associated with their respective city centre masterplans. All these proposed developments will require significant amounts of aggregates for delivery. There is also the likelihood of major highway schemes being implemented in the short term including the Stubbington Bypass.

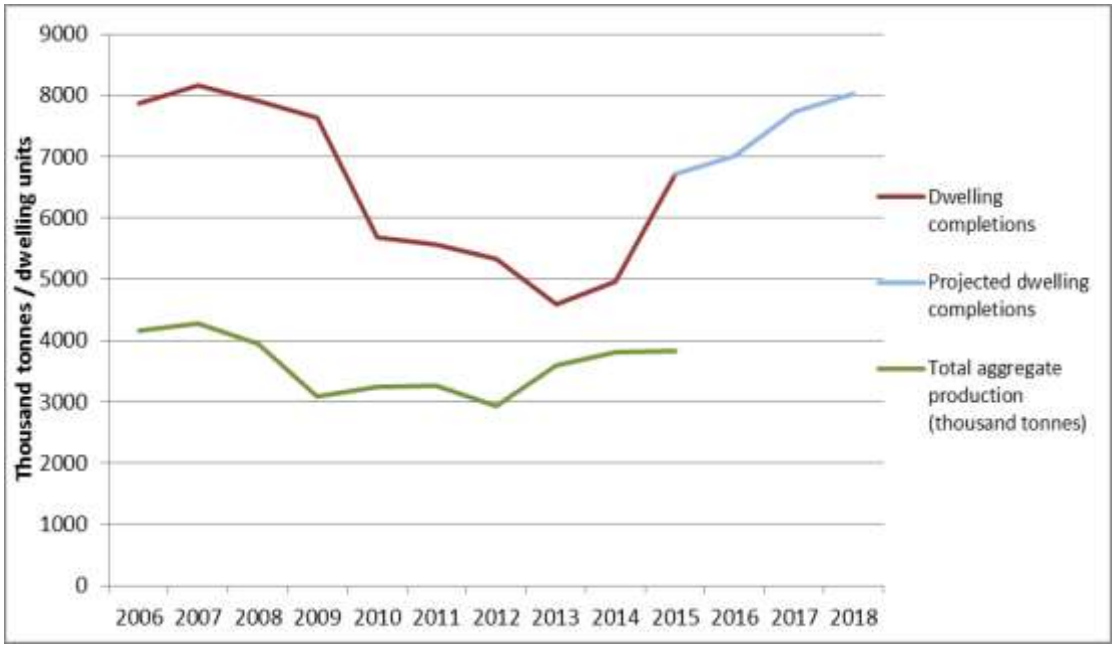
4.2.3 Figure 11 below demonstrates the existing correlation between previous year's aggregate sales and gross dwelling completions in

[37] HMWP - Minerals In Hampshire: Background Study: http://documents.hants.gov.uk/mineralsandwaste/HMWP100bMineralsinHampshirev7-SubmissionRevisedFeb2013.pdf

[38] DCLG, 2016: https://www.gov.uk/government/statistics/mineral-extraction-in-great-britain-2014

Hampshire. The graph also includes projected housing completions for the next three years; this estimate has been based on intelligence received from developers regarding the phasing of large residential developments (over ten dwellings) over the next three years. Since small scale housing developments are excluded in this, an average of the last three years small housing completions (1,358 dwellings per annum) was included within the large scale housing projection for each of the next three years.

Figure 11 - Dwelling completions and projected dwelling completions in Hampshire compared to aggregate sales, 2006 - 2018



Source: *Aggregate Monitoring Surveys 2006 - 2015 and Land Supply (HCC)*
Note that the dwelling completions are provided for financial years, i.e. the figure for 2006 includes completions for the financial year of 2005 - 2006.

4.3 Opportunities

4.3.1 Options for delivering 1.56 mtpa of land-won aggregate over the plan period to 2030 were extensively assessed through the *Integrated Sustainability Appraisal (ISA)*[39], as well as other forms of appraisal such as the *Habitats Regulation Assessment*[40] as part of plan preparation for the HMWP. In addition, more detailed information is

[39] HMWP - Hampshire Minerals and Waste Plan Integrated Sustainability Appraisal Report: http://documents.hants.gov.uk/planning-strategic/HMWPISAReportFINALJuly2013.pdf
[40] HMWP - Hampshire Minerals and Waste Plan Assessment Under the Habitats Regulations: http://documents.hants.gov.uk/planning-strategic/HMWPHRARecordFINALSept2013.pdf

also contained in the *Minerals in Hampshire: Background Study*[41] and the *Minerals Proposal Study*[42].

4.3.2 In terms of the HMWP ISA, it is important to note that no weighting was applied to the criteria of ISA objectives when assessing the proposals. All of the criteria were considered with equal weight and the most sustainable options which were identified for further land-won extraction as a result of this process are illustrated in Table 12.

4.3.3 The supply of sand and gravel from the most recent sales data against the HMWP requirement and the local aggregate provision is shown in Table 12. The latest 10 year local aggregate provision has been updated to include the latest sales for 2015 and shows that currently the sand and gravel held in permitted reserves and allocated sites is higher than the total Plan requirement (the fixed HMWP local aggregate provision of 1.56 mtpa). This is highlighted by the fact that the total sand and gravel from unallocated (or 'windfall') sites is now shown as a surplus - i.e. it is not necessary for unallocated sites to be proposed in order to meet the plan requirement at this point in time.

Table 12 - Land-won provision in Hampshire to 2030

	HMWP Local Aggregate Provision			**Latest 10-year Local Aggregate Provision (Based on sales)**		
	SS&G (mt)	**Soft Sand (mt)**	**Total (mt)**	**SS&G (mt)**	**Soft Sand (mt)**	**Total (mt)**
Annual provision / sales	1.28	0.28	1.56	0.86	0.15	1.02
Total Plan Requirement: Annual provision x Plan period (14.25 years) [a]	18.24	3.99	22.23	12.26	2.14	14.54
Permitted reserves (at 31.12.14)	9.9	1.5	11.4	9.9	1.5	11.4
Allocated Sites						
Bleak Hill Quarry Extension	0.50	0.00	0.50	0.50	0.00	0.50
Bramshill Quarry Extension	1.00	0.00	1.00	1.00	0.00	1.00
Cutty Brow	1.00	0.00	1.00	1.00	0.00	1.00
Forest Lodge Farm	0.17	0.40	0.57	0.17	0.40	0.57
Hamble Airfield	1.50	0.00	1.50	1.50	0.00	1.50

[41] HMWP - Minerals In Hampshire: Background Study: http://documents.hants.gov.uk/mineralsandwaste/HMWP100bMineralsinHampshirev7-SubmissionRevisedFeb2013.pdf

[42] HMWP - Hampshire Minerals Proposal Study: http://documents.hants.gov.uk/mineralsandwaste/HMWP101MineralsProposalStudyv5-SubmissionFeb2012.pdf

Purple Haze	0.38	3.63	4.00	0.38	3.63	4.00
Roeshot	3.00	0.00	3.00	3.00	0.00	3.00
Sub-Total	7.55	4.03	11.58	7.55	4.03	11.58
Permitted reserves + allocated sites [b]	17.45	5.53	22.98	17.45	5.53	22.98
Unallocated [b - a] -	-0.79	+1.54	+0.75	+5.19	+3.39	+8.45
Annual (unallocated / 15.25 year total)	-0.06	+0.11	-0.05	+0.36	+0.24	+0.59
Note: - indicates deficit / + indicates surplus						

Source: *Aggregate Monitoring Surveys*

4.3.4 Please note**,** although Frith End and Kingsley Quarry sites have been classified as including silica sand, their reserves have remained included within the soft sand reserves in the table above.

4.3.5 Over and above the sites allocated in the HMWP, additional land-won aggregate sites could be considered against criteria set out in *Policy 20 (Local land-won aggregate)* of the Plan for sites which may come forward outside of the areas identified (i.e. 'unallocated' sites).

4.3.6 Historically there have been a number of proposals which have been granted planning permission without being previously identified within the adopted plan at the time. Unallocated sites play an important contribution in meeting Hampshire's aggregate demand. Historically, over the 15 year period from 1996 - 2010, a total of 4.76 mt has derived from unallocated opportunities in Hampshire, which equates to an annual average of 0.30 mt, and hence just over twice the annual contingency (0.16 mt) which is required throughout the duration of the HMWP[43]. However by their nature, it cannot be predicted if or when an unallocated site may become available and promoted for mineral extraction, so this cannot be included within projections for meeting aggregate demand.

4.3.7 In respect to soft sand, a particularly significant material, the remaining soft sand reserves at each of the five sites in Hampshire where soft sand is extracted are likely to be supplemented within the plan period through two additional sites (Purple Haze and Forest Lodge Home Farm) and potentially from the Mineral Safeguarded Area at Whitehill & Bordon (in the district of East Hampshire).

4.3.8 Should unallocated opportunities not come forward, then the NPPF allows for MPAs to consider the contribution that secondary and recycled aggregate can make as substitutes for primary materials. An assessment of capacity for recycled and secondary aggregate has already been provided in this LAA (See Section 2.1 ‘Recycled and

[43] HMWP - Minerals In Hampshire - Background Study: http://documents.hants.gov.uk/mineralsandwaste/HMWP100bMineralsinHampshirev7-SubmissionRevisedFeb2013.pdf

Secondary Aggregate') and has shown there to be significant available capacity.

4.3.9 In terms of future capacity provision for hard rock importation in Hampshire, opportunities for rail depots have been identified at the centre of the county at Micheldever and in the north of the county at Basingstoke. Provision of this additional capacity would ensure alternative provision is made to cover any shortfalls in other supplies, and help reduce the quantity of hard rock being imported by road into the north of the county.

4.3.10 Although evidence has clearly shown that there is no requirement for further wharf capacity within the Plan period[44], the potential to provide additional sea import capacity for either hard rock or marine-won sand and gravel is still considered to be limited. Further capacity is unlikely to be delivered unless existing infrastructure or port land is released from its current use. This may include existing MoD wharfage which may become surplus, or existing operational, commercial or military port land. The development of further capacity could only take place if a site is considered to be suitable (i.e. meets other environmental and amenity criteria and policies) and is deliverable as a potential location for further capacity.

4.4 Potential constraints to future supply

4.4.1 Minerals can only be worked where they are found. The site appraisal process undertaken for the HMWP has highlighted issues associated with already limited options for viable and deliverable indigenous sand and gravel resources. This may limit further land-won extraction in the future. This includes the consideration of the following issues:

- environmental and landscape designations;
- water resources;
- soils; and
- communities and amenity.

4.4.2 Hampshire has a significant number of environmental and landscape designations (e.g. National Parks, Areas of Outstanding Natural Beauty and Special Protection Areas) which can restrict, and may continue to restrict opportunities for future minerals development, particularly in regard to land-won extraction. Protected habitats and landscape character are addressed through both Policy 3 and 4 respectively of the HMWP.

4.4.3 Similarly, floodplains (groundwater/fluvial/tidal), Source Protection Zones (SPZs), secondary and principal aquifers, groundwater depth,

[44] HMWP - Needs Assessment for Wharves and Rail Depots in Hampshire: http://documents.hants.gov.uk/mineralsandwaste/HMWP012WharvesandRailDepotsupdateFINALFeb2011.pdf

geology and smaller abstractions (without modelled SPZs) are also constraints which need to be taken into consideration when identifying suitable sites for mineral extraction, this is addressed through Policy 11 of the HMWP.

4.4.4 Minerals development tends to be in areas of rich soil quality. Almost 60% of Hampshire's agricultural land is considered to be 'best and most versatile' land[45]. It is therefore essential that minerals development takes sensitive land and soils into consideration. Through restoration, the landscape and its associated soils should be returned to a suitable quality, to ensure that high quality agricultural land and soils are not lost (*Policy 8 (Protection of soils*) of the HMWP covers this particular issue).

4.4.5 Minerals development should not have a significant impact on communities if they are designed, managed and located appropriately. However, concerns may still be raised about the potential impacts of noise and dust, as well as associated lorry movements, particularly at a planning application stage. Such issues need to be addressed to ensure that minerals development does not significantly impact the amenity of local communities. Conditions attached to planning permissions for minerals development can reduce and mitigate any potential impacts, as appropriate. Detailed consideration of minerals processes and the implications, if any, for human health is the responsibility of the pollution control authorities. However, planning authorities operate in the public interest to ensure that the locations of proposed development are acceptable and public health and safety is a material consideration in these decisions.

4.4.6 The primary aim of minerals planning is to prevent, minimise or mitigate these impacts to an acceptable level (HMWP Policy 10 deals with these specific issues).

4.4.7 Although no further capacity for wharves and rail depots is required within the plan period and there is sufficient spare capacity to deal with any increase in requirements, it is important that capacity is monitored. The closure of existing operational sites, although not anticipated, could impact Hampshire's capability to import marine-won aggregates if significant loss of capacity takes place. In addition, if operational practices change, Hampshire's existing aggregate wharves may not meet modern and future operational requirements of the marine aggregates industry.

[45] Best and most versatile agricultural land (BMV): http://planningguidance.communities.gov.uk/blog/guidance/natural-environment/brownfield-land-soils-and-agricultural-land/

5. Hampshire's Local Approach

5.1 The decision to develop a local aggregate provision for Hampshire as part of plan preparation was considered to be the most appropriate approach for Hampshire to take, due to the following issues at the time:

- a significant reduction in land-won sales locally, regionally and nationally over the past 20 years;
- the availability of an alternative supply of sand and gravel in Hampshire from both marine sources and recycled/secondary aggregate;
- a significant number of landscape and habitat constraints;
- provision from the Chief Planning Officer for MPAs to develop 'local' (in place of 'regional') apportionment figures for planning purposes if they have new or different information and a robust evidence base; and
- the absence of up-to-date national guidelines.

5.2 The 10 year average sales approach provides a simple method that is readily understandable by all interested parties. It is a transparent approach which can be easily calculated, and does not rely on a 'black-box' model that contains confidential combinations of various variables. Furthermore, it is based on 'what actually happened' (actual sales). The calculation of an average smoothens out the peaks and troughs that are experienced in every growth cycle, and therefore, provides a more stabilised level of supply for industry.

5.3 The decision to use a 10 year average, as opposed to a shorter or longer sales period, was felt to be a prudent choice. 10 years was considered to be a sufficiently long sales period on which to base a local aggregate provision, as it is a period that takes in both periods of high economic growth (2006-2008) and low economic growth (2008-2013). The use of 10 year averages also reflects the approach of the NPPF.

5.5 Past sales, as opposed to aggregate consumption, reflect the quantity of aggregate required of a sub-region/MPA, as they take into account the inter and intra-regional flows of aggregate that take place, and as such, more accurately reflect the market areas, rather than MPA boundaries.

5.6 Despite the dissolution of formal regional planning, the flow of land-won aggregate both sub-regionally and between regions continues to take place. Hampshire has developed a locally derived aggregate provision that meets the requirements of the NPPF[46]. This LAA shows that on a

[46] National Planning Policy Framework, https://www.gov.uk/government/uploads/system/uploads/attachment_data/file/6077/2116950.pdf

regional market basis, Hampshire's local aggregate provision will have very little effect, and will actually help regional production more accurately reflect current levels of sales.

5.7 It is the Hampshire Authorities' understanding that the decline in land-won sand and gravel sales is a long-term one and is representative of the gradual decline in overall aggregate sales. The reasons for this are understood to be due to:

- the development of more efficient construction techniques requiring less aggregate;
- the decline in the construction of big infrastructure programs; and
- the increased importance and reliance on alternative sources.

5.8 It is considered that the proportion of recycled and marine aggregate[47] of the overall aggregate supply in Hampshire is likely to increase throughout the HMWP period. More information on this can be found in documents submitted as part of the public hearing for the HMWP[48]. Furthermore, the NPPF[49] provides significant support for recycled aggregate which is considered likely to increase before land-won supply increases.

5.9 The HMWP was adopted in October 2013 with a land-won sand and gravel provision of 1.56 mtpa. The latest 10 year (2006-15) sales average of 1.02 mtpa indicates that the planned provision is more than sufficient at this point in time.

5.10 The LAA 2016 seeks to show Hampshire's up to date position and identify any issues in the approach adopted in the HMWP which may need to be addressed as a result of this monitoring.

5.1 Consultation and the duty to co-operate

5.1.1 The Hampshire Authorities have sought to work collaboratively with other authorities in the preparation of this, and previous versions of the LAA, in order to satisfy Section 110 of the Localism Act[50]. As such, the draft 2016 LAA was consulted with the following bodies for comment:

- South East England Aggregate Working Party (SEEAWP);
- South West Aggregate Working Party (SWAWP);
- Marine Management Organisation (MMO);
- The Crown Estate;

[47] Crown Estate communication - 30/9/14
[48] ND079 - Marine Mineral Planning 50 years supply
[49] National Planning Policy Framework: https://www.gov.uk/government/uploads/system/uploads/attachment_data/file/6077/2116950.pdf
[50] Section 110 of the Localism Act: http://www.legislation.gov.uk/ukpga/2011/20/contents/enacted

- Dorset County Council;
- Somerset County Council;
- Cornwall Council;
- Wiltshire Council; and
- Minerals operators with an interest in Hampshire (and not a member of SEEAWP).

5.1.2 The MASS guidance indicates that all LAAs should be submitted for consideration and scrutiny to the relevant aggregate working party. The Aggregate Working Parties should provide technical advice on the adequacy of each LAA.

5.2 Planning ahead

5.2.1 Although supported by national policy, common sense also requires aggregate to be supplied from a variety of sources to ensure resource security which could cover any shortfall in future supply. Hampshire has the advantage of being able to access aggregates from many sources. Hampshire's local approach far more accurately reflects the current situation in the County and enables land-won sand and gravel to be planned for more sustainably.

5.2.2 The reserves permitted and allocated in the HMWP are close to historical and current markets outside Hampshire, such as Dorset and West Berkshire. Therefore it is anticipated that those market areas will continue to be supplied in the future.

5.2.3 The Hampshire Authorities and SDNPA feel that the approach taken in the adopted HMWP is the most sustainable and realistic one to take forward and plan strategically for until 2030.

5.2.4 Opportunities for land-won production in Hampshire are limited due to the environmental, access and community constraints present in Hampshire[51]. Land-won sales have significantly reduced over the past 10 years and as such, the level of land-won provision as identified in the adopted HMWP is considered to be more than sufficient.

5.2.5 In order to respond to any unforeseen rises in demand for sand and gravel over the HMWP period, provision has been made within the HMWP for robust monitoring of all policies so that sales can be monitored against the local land-won provision and the demand for aggregates. This will ensure that the infrastructure to provide for a steady or increased supply of marine-won and/or recycled/secondary aggregate is in place.

[51] HMWP - Minerals In Hampshire - Background Study: http://documents.hants.gov.uk/mineralsandwaste/HMWP100bMineralsinHampshirev7-SubmissionRevisedFeb2013.pdf

6. Conclusions and review of the Local Aggregate Assessment

6.1 As detailed in this LAA, Hampshire has a full range of supply options available to meet aggregate needs within the HMWP area, including recycled and secondary aggregate, imported materials, marine-won and land-won aggregates. This LAA has shown that compared to 2014 there:

- has been a recorded decrease in sales of land-won aggregate and this is now 53% of the HMWP local aggregate provision (of 1.56 mtpa);
- has been a recorded decrease in sales of recycled and secondary aggregate but an increase in recycled and secondary aggregate production capacity;
- are significant existing marine reserves of sand and gravel accessible to Hampshire users and that there is sufficient capacity to handle increased imports of marine-won sand and gravel if the market demand increased; and
- is sufficient capacity at the existing rail depots to meet the needs of hard rock importation, although it should be noted that all existing facilities are located in south Hampshire[52].

6.2 In terms of land-won sand and gravel, Hampshire has experienced a long decline in sales over the last ten years which reflects the experience of the South East region as a whole, 2015 showed there was also a decrease in sales. In order to plan for future supply, Hampshire has adopted a forecast model for demand based on average sales data of land-won sand and gravel which meets the requirements of the NPPF and is consistent with the overall objective to minimise the amount of primary extraction. This approach results in a local aggregate provision of 1.56 mtpa. This has been rigorously assessed and evidence has shown that due to Hampshire's unique environment, further land-won extraction in the future will be severely limited.

6.3 This LAA has also shown that Hampshire's local aggregate provision will not impact on the wider South East region as a whole. This is a key issue as Hampshire is a net exporter of land-won sand and gravel but also imports and exports occur with neighbouring and non-neighbouring mineral planning authorities.

6.4 This document highlights that although there is generally a surplus in aggregate handling capacity there may be a need for additional infrastructure, particularly with regard to meeting Hampshire's needs

[52] The allocation of Micheldever Sidings in the HMWP will provide a more sustainable transport option for importing aggregate into the north of Hampshire.

for land-won mineral extraction up to 2030 and beyond. The need for any additional infrastructure, such as the further requirement for land-won extraction, will be identified through the LAA and the HMWP monitoring indicators which will highlight any developing issues.

Monitoring and review

6.5 The HMWP includes a commitment to monitor and annually review this LAA to ensure that a steady and adequate supply is maintained. Review of any new data on aggregates that is collected between aggregate monitoring surveys takes place as it is received.

6.6 A revised (draft) LAA will be produced in advance of the annual Monitoring Report (MR) for consultation in September / October each year. The MR covers all other areas that are subject to monitoring (and not covered by the LAA) and will be published in December 2016. A finalised LAA will sit alongside this MR.

6.7 The MR will contain a review of Hampshire's landbank which will state whether the Hampshire Authorities need to review the current provision and whether a review of allocations is required.

Appendix A - Consultation responses to the draft LAA

Only one response was received on the draft 2016 LAA (published for comment October 2016) from the SEEAWP Technical Secretary. Following discussion at the SEEAWP meeting on 21st November 2016, this LAA was updated to reflect the comments made – most notably on clarification of presentation of date and to highlight the position more clearly on IBA recycling and the impact of silica sand sales.

SEEAWP South East England Aggregates Working Party

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SEEAWP Mineral Planning Authorities

19 December 2016

Dear Head of Planning Services

South East England Local Aggregate Assessments 2016

Thank you for submitting your authority's draft Local Aggregate Assessment (LAA) for consideration by SEEAWP.

SEEAWP met on the 21 November and considered SEEAWP 16/04. The LAAs were approved by SEEAWP and the draft Minute with 16/04 are attached to the email covering this letter.

Both the report 16/04 and the Minute contain remarks which I hope that your authority will take into account, as appropriate, when finalising the current LAA. There are also further comments that you might wish to take into account when preparing future LAAs.

I appreciate your cooperation in this matter and please contact me if you require further assistance.

Yours faithfully

Richard Read

Richard Read BA. MRTPI
Secretary to SEEAWP

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