Chapter 08 Minerals

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"Minerals are an important element in the economy of the South East, but their extraction can have a significant environmental impact. Government planning policies for minerals aim to ensure that there is an adequate supply, having regard to the objectives of sustainable development." (Regional Planning Guidance for the South East)

Indicator	Latest Data	Progress	RPG9 Policy	IRF Objective	Targets
79 The production of primary land-won aggregates (tonnes): by minerals planning authority	2006: 8.8mt production from quarries in the region	✗	M3	n/a	■ Maintain a landbank of at least seven years of planning permissions for land-won sand and gravel to deliver 13.25 million tonnes of sand and gravel per annum
The production of secondary/recycled aggregates and recycled material used (tonnes)	2005: 6.6mt	–	M2		■ Use of secondary aggregates and recycled materials in the South East should increase from 6.6mtpa to at least 7.7mtpa by 2016
80 The amount of recycled construction, demolition and mineral waste used (million tonnes) and as a proportion of South East primary aggregates production and consumption	2005: Production: 39% 2005: Consumption 31%	✓			
Scale of permitted reserves for each of the itemised minerals	Sand & gravel <7 years Rock >7 years Brick Clay >25 for a number of brickworks Chalk >25 years Silica Sand >10 years reserves for some producers Gypsum >20 years	–	M4		■ Maintain a permitted reserve of clay for brick and tile product manufacture sufficient to last for at least 25 years at current production rates; or a lesser period for small scale manufacture ■ Maintain a permitted reserve of chalk for cement manufacture sufficient to last for at least 25 years at current production rates in Kent and Medway ■ Maintain a permitted reserve of silica sand to last at least 10 years at existing sites and at least 15 years at new sites in Surrey and Kent ■ Maintain a permitted reserve of gypsum sufficient to last at least 20 years in East Sussex
81 The number and capacity of safeguarded wharf and rail depot facilities	2006: 37 active wharves; 20 active rail depots	–	M5		■ Safeguard wharves and rail depots with sufficient capacity to provide for aggregates

Key to table: National Core Output Indicator

Policy implications

Primary aggregates

Policy M3 sets the sub-regional apportionment for Primary Aggregates.

Generally this is good news, with fewer primary aggregates being extracted year on year, a consistent pattern over the last eight years. However, the lower production and a 61% decline in land-won sand and gravel reserves over the last 10 years could lead to a greater level of imports transported over longer distances. It is important to safeguard wharves and rail depots so that any increase in imports is by sea or rail rather than by road.

The sub-regional apportionment is currently subject to a partial review and work is being undertaken by the Assembly to assess potential capacity and any constraints on wharves and rail depots in the region which will help with future monitoring of this policy.

M3 – 2006 | M3 – 2007

Recycled and secondary aggregates

Policy M2 aims to increase the proportion of recycled and secondary aggregates to help reduce the need for primary aggregates.

Recycled aggregates and secondary materials are supplying an increasing proportion of aggregate production and consumption, reducing the demand on primary aggregates. However, the 2005 CE&DW and Secondary materials survey is unable to confirm whether the use of such materials is any greater than in 2001 and 2003.

M2 – 2006 | M2 – 2007

Other minerals

Policy M4 aims to ensure that extraction of other minerals is managed in a sustainable way by the MPAs.

There are permitted reserves of chalk for cement manufacture and gypsum sufficient for at least 25 and 20 years respectively although it is not clear whether there are adequate reserves of silica sand.

M4 – 2006 | M4 – 2007

Safeguarding of wharves, rail depots and mineral reserves

Policy M5 aims to safeguard wharves, rail depots and mineral reserves.

Wharves and depots are already safeguarded in existing local plans and this is being carried forward into Local Development Frameworks (LDFs) and Local Development Documents (LDDs).

M5 – 2006 | M5 – 2007

Minerals

RPG9 POLICY:

M2 Recycled and Secondary Aggregates
M3 Primary Aggregates
M4 Other Minerals
M5 Safeguarding of Wharves, Rail Depots and Mineral Reserves

Indicator 79

The production of primary land-won aggregates (million tonnes).

- **2001: 12.4mt**
- **2002: 11.5mt**
- **2003: 10.7mt**
- **2004: 10.4mt**
- **2005: 9.6mt**
- **2006: 8.8mt**

Source: SEERAWP annual mineral surveys 2001-06

Indicator 80

The amount of recycled construction, demolition and mineral waste used (million tonnes) and as a proportion of South East primary aggregates production and consumption.

- **2001: 30% of production**
- **2005: 39% of production**

Source: SEERAWP annual aggregates survey

- **2001: 19% of consumption**
- **2005: 31% of consumption**

Source: CLG Aggregates Minerals Survey for England & Wales

Indicator 81

The number and capacity of safeguarded wharf and rail depot facilities.

- **37 active wharves**
- **20 active rail depots**

Source: SEERAWP annual monitoring surveys

Highlights

- The volume of land-won sand and gravel extracted continues to fall, resulting in recycled materials providing a larger proportion of aggregate supply.
- Reserves of land-won sand and gravel at the regional apportionment level are less than seven years. This does not meet Policy M3 which requires 'a landbank of reserves of at least seven years'. However, at current sales, reserves of sand and gravel would last eight years.
- In the last three years the tonnages in planning permissions have replaced little more than a quarter of sales.
- Wharves have handled some 10mt of crushed rock and marine sand and gravel, 2mt more than in 2006. Both wharves and rail depots have capacity to handle larger tonnages.

Commentary

The increasing contribution of recycled aggregate and secondary materials in place of primary aggregate extraction is to be welcomed. However, this partly results from a continuing decline in land-won sand and gravel extraction rather than a significant increase in the use of recycled aggregate and secondary materials. It is not clear whether the increase sought in Policy M2 is being realised, considering the uncertain nature of national and regional level estimates.

The 61% decline in reserves over the last 10 years is owing to the tonnage in new permissions being no more than 40% of the level of sales. In the last three years this has worsened to a little over a quarter of sales.

The decline in reserves is most marked in the South East, but is also evident in other regions. Communities and Local Government (CLG) has commissioned a study to identify the reasons behind the lack of replacement tonnages – to report in 2008.

The South East is heavily dependent upon crushed rock imports and marine sand aggregate supplies, which together exceed the land-won aggregate extraction tonnage. It is important to safeguard wharves and rail depots in the region, including the potential for handling increased capacity. The Regional Assembly is co-ordinating an assessment of wharves and rail depots through three related studies, which will enable a fuller understanding next year of potential capacity and any constraints applying to the sites.

The Government is currently consulting on Draft Revised National and Regional Guidelines for Aggregates Provision in England: 2005-20. This includes an assumed 9% increase in the use of alternatives to primary aggregates, an 8% reduction in the regional tonnage for land-won extraction of sand and gravel and a 29% reduction in crushed rock extraction.