

West Sussex Joint Minerals Local Plan

**Draft Assessment of Need for Aggregates:  
Local Aggregate Assessment 2023**

January 2025



Working in Partnership



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# **Executive Summary**

The National Planning Policy Framework (NPPF) requires Mineral Planning Authorities (MPAs) to prepare an annual Local Aggregates Assessment (LAA)<sup>1</sup> which is an evidence base document that sets out the potential demand, and assessment of potential supply, of aggregates within their area. This joint LAA has been prepared by West Sussex County Council (WSCC) and the South Downs National Park Authority (SDNPA) and provides evidence to support the West Sussex Joint Minerals Local Plan (JMLP).

## **Chapter 1: Introduction**

This chapter explains the background to the Managed Aggregate Supply System (MASS) and the requirement for Mineral Planning Authorities to prepare an LAA. It explains how the LAA informs and supports the JMLP which has been prepared jointly by WSCC and the SDNPA. The LAA incorporates the findings from the latest round of evidence gathering during 2023. This evidence includes that which shows how 'other relevant local information' influences the estimated demand and supply of aggregates through the life of the JMLP (to 2033).

## **Chapter 2: Aggregates in West Sussex**

This chapter sets out the past to current demand for, and supply of, aggregates in West Sussex from each different source in turn; the key findings are set out within the "Dashboard" below.

## **Chapter 3: Balance between Demand and Supply**

This chapter summarises the supply of aggregates from different sources and allows for a comparison of the different supply options based on relevant local information. It concludes that:

- Existing permitted reserves of land-won sharp sand and gravel provide a landbank of between 2.7-4 years based on forecasted demand values, which is based on the three-year average and the 10-year average sales (taking account of other local relevant information) for the plan period, respectively.
- Soft sand resources are constrained by being situated in the South Downs National Park (and its setting). Existing reserves are sufficient to supply soft sand at levels equivalent to the 10-year average sales for 3.5 years, and, taking account of relevant local information, for 2.7 years. The JMLP allocates three sites for future soft sand extraction, two of which are in the South Downs National Park.
- Safeguarded wharves, railheads and recycled aggregate sites will continue to be the majority sources of supplies for sharp sand and gravel.
- Safeguarded wharves and railheads will continue to provide the importation infrastructure through which the supplies of crushed rock are imported.

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<sup>1</sup> See para 219(a)

## West Sussex LAA Dashboard 2023<sup>2</sup>

All units expressed in 'thousand tonnes' unless otherwise specified.

Aggregate	Sales 2023	Average annual sales <sup>3</sup>		Average annual sales trend <sup>4</sup>		Reserves @ 31/12/23	Reserves trend <sup>4</sup>		Aggregate Provision Rate (APR) <sup>5</sup>	Landbank (years)	Planned allocations outstanding <sup>6</sup>	Capacity <sup>7</sup> @ 31/12/23 (ktpa)	Notes <sup>8</sup>
		10-year	3-year	10-year	3-year		10-year	3-year					
Soft (building) sand (SS)	180	257	211	↓ Down	↓ Down	889	↓ Down	↓ Down	330	3	2680	-	There are three allocations for soft sand in the Joint Minerals Local Plan. APR is based on high growth scenario
Sharp sand and gravel (SSG)	138	108	158	↓ Down	↑ Up	423	↓ Down	↓ Down	157	3	0	-	There is only one dedicated SS&G site, with incidental sales (55% over last 10 years) coming from three of the soft sand sites. APR is based on high growth scenario
Sand and gravel (S&G) <sup>9</sup>	318	365	369	↑ Up	↓ Down	1,312	↓ Down	↓ Down	487	3	2680	-	-
Marine dredged aggregates (MDA)	906	1372	1066	↓ Down	↓ Down	-	-	-	n/a	-	-	-	WSCC use Marine Dredged landings to calculate APRs due to sales between sites resulting in double counting
MDA landings	863	1127	962	↓ Down	↓ Down	-	-	-	1647	-	-	-	APR is based on high growth scenario
Imported S&G @ wharves	-	-	-	-	-	-	-	-	-	-	-	-	-
Imported CR @ wharves	32	85	51	↓ Down	↓ Down	-	-	-	124	-	0	-	APR is based on high growth scenario
Imported S&G @rail depots	104	84	95	↓ Down	↑ Up	-	-	-	122	-	0	-	APR is based on high growth scenario

<sup>2</sup> The LAA date is that for the current AM data collection year and the corresponding Annual Report.

<sup>3</sup> Average annual sales should include current year's sales.

<sup>4</sup> The trends should be derived from the Excel 'trend line' for the relevant time series data

<sup>5</sup> APR - Aggregate Provision Rate also known as LAA Rate - based on MPA's judgement/default 10-year average sales and justified in the Commentary. **NB APRs should be also applied to aggregates handled by the wharves, rail depots and S/RA sites - custom has been to use 10-year average sales, unless compelling evidence to use an alternative.**

<sup>6</sup> Allocations as estimated total tonnage in adopted mineral plan and not yet permitted.

<sup>7</sup> Capacity as estimated by MPA through current AM survey - see definition in AM survey form.

<sup>8</sup> Reserved for technical clarifications, otherwise record remarks and judgements in Commentary.

<sup>9</sup> S&G is the combination of SS and SSG.

Aggregate	Sales 2023	Average annual sales <sup>3</sup>		Average annual sales trend <sup>4</sup>		Reserves @ 31/12/23	Reserves trend <sup>4</sup>		Aggregate Provision Rate (APR) <sup>5</sup>	Landbank (years)	Planned allocations outstanding <sup>6</sup>	Capacity <sup>7</sup> @ 31/12/23 (ktpa)	Notes <sup>8</sup>
		10-year	3-year	10-year	3-year		10-year	3-year					
Imported CR @ rail depots	782	637	711	↓ Down	↑ Up	-	-	-	931	-	0	-	APR is based on high growth scenario
Secondary aggregate	11	11	11	↔ Same	↔ Same	-	-	-	11	-	n/a	-	WSCC don't use survey data due to unreliable data and therefore use EA WDIs.
Recycled aggregate	351	371	352	↑ Up	↑ Up	-	-	-	371	-	n/a	-	

# **1. Introduction**

## **1.1. The Managed Aggregate Supply System**

- 1.1.1. Aggregates are used for the construction of homes, commercial development and infrastructure (such as roads). It is therefore important that nationally there is an adequate and steady supply to ensure economic development and quality of life. The Managed Aggregate Supply System (MASS) has been the mechanism to ensure there has been an adequate supply of aggregates (sand, gravel and crushed rock) in England for over 35 years.
- 1.1.2. Minerals can only be worked where they occur and their extraction can potentially cause conflict through loss or changes to valued landscapes. The MASS system was developed due to the geographical imbalance of aggregates and to ensure Mineral Planning Authorities (MPAs) make an appropriate contribution to the national need for aggregates as well as local supply. As part of the MASS system, each MPA is required to prepare a Local Aggregate Assessment (LAA) which assesses the demand and supply of aggregates in its area on an annual basis. LAAs can be prepared jointly by more than one authority.

## **1.2. What is a Local Aggregate Assessment?**

- 1.2.1. The requirement for MPAs to prepare a LAA is set out in the National Planning Policy Framework (NPPF) and the national Planning Practice Guidance (PPG). Paragraph 62 of the PPG states that LAA should cover the following<sup>10</sup>:
- "A forecast of the demand for aggregates based on both the rolling average 10-year sales data and other relevant local information;
  - An analysis of all aggregate supply options, as indicated by landbanks, mineral plan allocations and capacity data, e.g., marine licences for marine aggregate extraction, recycled aggregates and the potential throughput from wharves. This analysis should be informed by planning information, the aggregate industry and other bodies such as local enterprise partnerships; and
  - An assessment of the balance between demand and supply, and the economic and environmental opportunities and constraints that might influence the situation. It should conclude if there is a shortage or surplus of supply and, if the former, how this is being addressed."
- 1.2.2. The national PPG, Paragraph 64<sup>11</sup>, states that the LAA "must also consider other relevant local information in addition to the 10-year rolling supply", and this information may include "levels of planned construction and house building", as well as considering average sales over the last three years to identify general trend of demand.
- 1.2.3. This LAA incorporates the findings from further evidence gathering that has considered 'other relevant local information' that may influence the demand of aggregates through the life of the Joint Minerals Local Plan (to 2033). This information, including anticipated levels of construction of homes and the maintenance and construction of roads, has been used to underpin a number of differing aggregate demand scenarios.

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<sup>10</sup> Paragraph 062 Reference ID: 27-062-20140306

<sup>11</sup> Paragraph 064 Reference ID: 27-064-20140306

- 1.2.4. While there are many end users of aggregates, many of these can be related to housing growth which are partially driven by demographic trends. Therefore, housing trends are considered to provide a useful indicator for trends in demand for other users of aggregates. Data and evidence on the future construction of homes therefore provide a sound baseline from which to assess possible future demand scenarios. Furthermore, information on planned highways works (maintenance and improvement) have also been considered as they consume aggregates (generally crushed rock).

### **1.3. West Sussex Joint Minerals Local Plan**

- 1.3.1. The West Sussex Joint Minerals Local Plan (JMLP) was adopted in July 2018. A Soft Sand Review of the JMLP was required following adoption of the Plan in July 2018. The partial review resulted in revisions to Policies M2 and M10 of the JMLP, in relation to the supply strategy for soft sand and the allocation of three sites for future extraction. The formal changes to the Plan were adopted in March 2021. A 5-year assessment of relevance and effectiveness was undertaken on the Plan in 2023, that confirmed the plan remains fit for purpose.
- 1.3.2. The JMLP takes account of evidence such as changes in relation to the demand and supply of minerals in West Sussex as well as government minerals planning policies (included in the NPPF). The Plan includes a vision; strategic objectives; a suite of strategic policies; strategic site allocations and development management policies.
- 1.3.3. Previous versions of the LAA, dating back to 2014, informed the preparation of the Plan (and the subsequent soft sand review) by setting out a forecast for the demand for aggregates over the Plan period and indicated what other local issues are likely to influence the ability of needs for aggregates to be met from minerals resources and facilities in West Sussex. The LAA is updated annually and provides the latest aggregates situation, to support the determination of planning applications for aggregate proposals.

### **1.4. National and Regional Context**

#### **National and Regional Guidelines for Aggregates Provision**

- 1.4.1. LAAs are prepared and used by MPAs, to help them plan for a steady and adequate supply of aggregates. In doing so MPAs participate in, and take the advice of an Aggregate Working Party (AWP), a technical advisory group of MPAs and relevant organisations that has the following role:
- to consider, scrutinise and provide advice on the LAAs of MPAs;
  - to provide an assessment of the overall demand and supply for the AWP area, including whether the area is making a full contribution towards meeting national and local aggregate needs;
  - to obtain, collect and report in data on minerals activity in their area, including annual data collected by the MPAs on sales, permissions and reserves of aggregates (including recycled and secondary sources).
- 1.4.2. West Sussex and the South Downs National Park Authority fall within the South East England Aggregate Working Party (SEEAWP) area.
- 1.4.3. As part of the Managed Aggregate Supply System (MASS), the amount of land-won aggregates to be provided by each region was set out in the "[National and Regional Guidelines for Aggregates Provision in England 2005-2020](#)" (June 2009). MPAs may decide, collectively, to plan for more or less than set out in the Guidelines based on



their LAA but this must be supported by robust evidence and be properly justified, having regard to the local and national need.

- 1.4.4. The data used in this LAA includes that from the National Aggregate Minerals Surveys carried out for the years 2014, 2019 and 2023. . The data on minerals movements for 2023 are yet to be published, therefore the LAA relies on the data from the 2019 survey.

### **Policy on National Parks**

- 1.4.5. In West Sussex a significant proportion of the sand and gravel resources are within, or in the setting of, the South Downs National Park (SDNP), and so national policy on development in National Parks needs to be taken into account<sup>12</sup>.

## **1.5. Consultation Arrangements**

- 1.5.1. In accordance with the NPPF and PPG, this LAA will be subject to consideration and scrutiny by the South East England Aggregate Working Party (SEEAWP).

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<sup>12</sup> NPPF Paragraph 226.

## 2. Aggregates in West Sussex

### 2.1. Supply Options

- 2.1.1. When planning for a steady and adequate supply of minerals, Mineral Planning Authorities have to consider all supply options. West Sussex currently supplies aggregates from a number of sources including:
- Soft sand and sharp sand and gravel extracted at quarries in West Sussex;
  - Recycled and secondary aggregate production;
  - Imported aggregate (e.g., crushed rock and sand and gravel), by road, rail and sea; and
  - Sand and gravel dredged from the sea bed (marine-won).
- 2.1.2. Each supply option is considered separately below including the economic and environmental opportunities and constraints that might influence the situation. This information is then used to consider the total aggregate supply picture and the balance between supply and demand.

### 2.2. Geology and Landscape

- 2.2.1. In broad terms, the county has a sequence of broad geological bands which run across the County from the west to east; see Appendix A.
- 2.2.2. **Soft Sand** is won from the Sandgate Formation and the Folkestone Formation (also known as the Folkestone Beds) which is worked in a number of locations in West Sussex. The variable grain size and low clay content mean that little or no processing is required to produce high quality construction and mortar sands.
- 2.2.3. Coarser, **sharp sand and gravels** lie over the chalk to the north of a line approximating to the route of the A27 and have been exploited in dry workings. Overlying the clay to the south, cleaner, better-sorted gravels have been exploited through wet working as evidenced by lakes around the eastern and southern fringes of Chichester. Sand and gravel resources are clustered around Chichester, and south of the SDNP from the Funtington area in the west to Slindon in the east. The sharp sand and gravel deposits are primarily used to make concrete, concrete products or cement.
- 2.2.4. The SDNP covers almost half the Folkestone Formation in West Sussex, and part of the sharp sand and gravel resource north of Chichester. The Chichester Harbour National Landscape (formerly AONB) includes a small area which contains potential sharp sand and gravel. The extent of these landscape designations is shown in Appendix A.
- 2.2.5. There are no indigenous sources of crushed rock in West Sussex, therefore, this aggregate is imported into West Sussex by rail or sea.
- 2.2.6. Much of the soft sand outside the SDNP in West Sussex has been worked or is currently being worked. The majority of the remaining land-won soft sand resources lie within the SDNP. Stakeholder engagement carried out in 2008/09 provided some information about the quality of sand and gravel resources outside the National Park. One operator advised that after some limited investigation (drilling boreholes, etc.) of unconsolidated sand deposits, anything east of Steyning was found to be finer and 'dirtier' deposits which may make extraction uneconomic on any significant scale. There has been no significant interest in any areas outside of the SDNP, including

through the “Call for sites” processes in 2014, and more recently, for the soft sand review, during 2018.

- 2.2.7. With regard to sharp sand gravel deposits, operators commented that it becomes much thinner to the south east and therefore uneconomic to work. At the western end, it was felt that any deposit south of the A27 would also be uneconomic.
- 2.2.8. Soft sand from the Sandgate Formation and the Folkestone Formation is worked in a number of locations in West Sussex. The variable grain size and low clay content mean that little or no processing is required to produce high quality building sands for plaster and mortar. Gravel of varying quality and some sharp sand is used for concrete products, which cannot be used as a building sand for mortar.

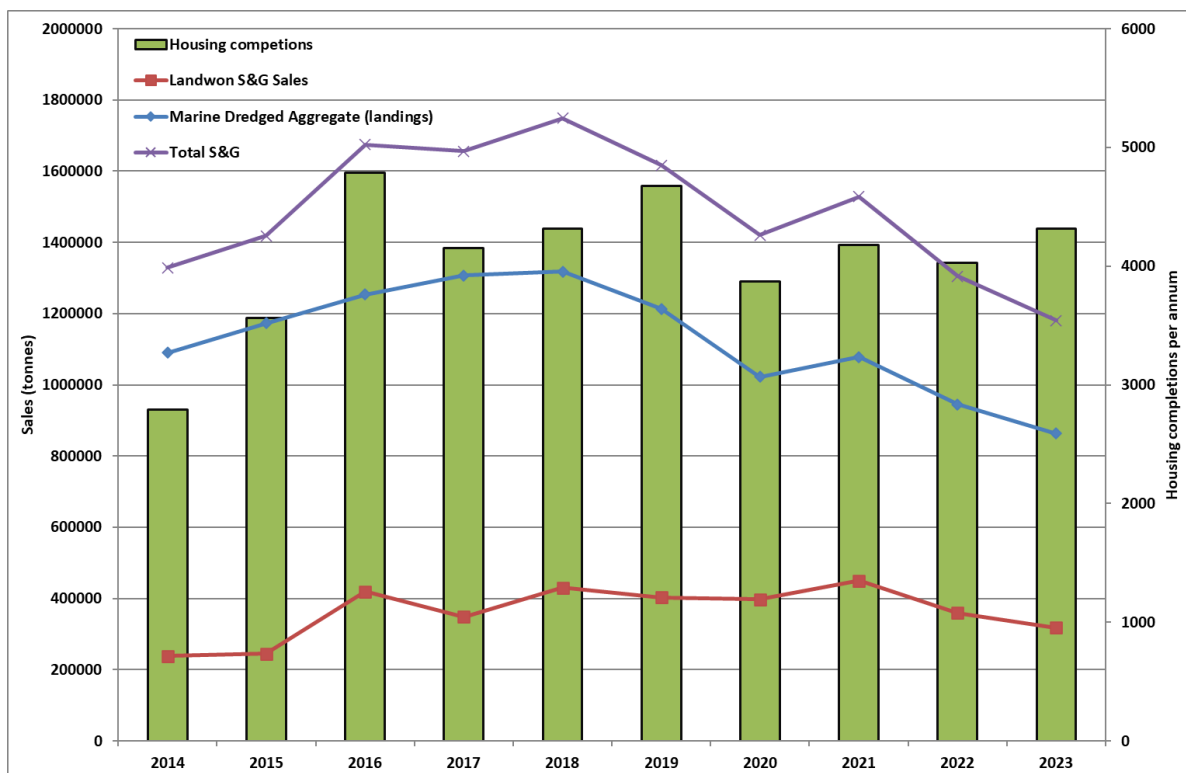
## **2.3. Land-Won Sand and Gravel**

- 2.3.1. Past sales figures for land-won sand and gravel provides an indication of the contribution that the land-won sources of supply has made to the total supply of aggregates in West Sussex.
- 2.3.2. Annual land-won sales data over the past 10 years is presented in Table 1 and Figure 1. This includes some material sold as fill or hoggin from the quarries also. Sales have fluctuated, with sales as low as 238,577 tonnes (2014), and as high as 449,982 in 2021 during the 10-year period since 2014. The average annual sales figure over the 10-year period for sand and gravel is 361,078 tonnes and the average for the past three years is higher (375,764 tonnes).
- 2.3.3. It is not possible to provide sales figures for individual mineral types but the average split between the two land-won aggregate types in West Sussex over the last 10 years is 70% soft sand and 30% sharp sand and gravel. This equates to 267,753 tonnes of soft sand and 108,849 tonnes for sharp sand and gravel (10-year annual averages).
- 2.3.4. As aggregates are used in the building of homes, it is worth considering housing completion data when considering trends in aggregate sales. Gross dwelling completions within West Sussex rose from a low of 2,400 in 2012/13 to a high of 4,784 in 2015/16. During the same period, total sand and gravel sales also increased, from 1.30mt (2013) up to 1.67mt (2016). Housing completions remained relatively steady between 2015/16 and 2019/20, as have sales of all sand and gravel. Housing completions have been at lower levels since 2019/20, as have aggregate sales. The data suggests a link between housing completions and aggregate sales, whereby as completions have risen and fallen in West Sussex, sales of sand and gravel have also risen and fallen.
- 2.3.5. Figure 1 shows that there is some correlation between aggregate sales and housing completions in West Sussex.

**Table 1: Sales of land-won sand and gravel in West Sussex 2014-2023**

Year	Sales (tonnes)
2014	238,577
2015	244,594
2016	420,000
2017	348,196
2018	430,478
2019	403,689
2020	397,954
2021	449,982
2022	359,537
2023	317,772
<b>3-Year Average (2021-2023)</b>	<b>375,764</b>
<b>10-Year Average</b>	<b>376,602</b> <b>(267,753 tonnes soft sand,</b> <b>108,849 tonnes sharp sand and gravel<sup>13</sup>)</b>

**NOTE:** Sales data is based on estimates using operator returns, supplemented, where necessary, by estimates based on past rates and information from site visits. The figures for soft sand and sharp sand and gravel have been amalgamated due to reasons of confidentiality.

**Figure 1: Sales of sand and gravel in West Sussex, compared to housing completions 2014-2023**

<sup>13</sup> Figures may not add up to 70% and 30% exactly due to rounding.

- 2.3.6. In the South East, the overall trend of sales is similar to that seen in West Sussex as can be seen in Figure 2, that presents sales between 2013 and 2022. The sales trend shows a general increase in sales for West Sussex and the South East, although the rate of increase in the South East is slower than that being experienced in West Sussex. Sales in 2022 decreased across both West Sussex and the wider South East compared to 2021.



**Figure 2: Land-won sand and gravel sales – South East England and West Sussex (2013-2022)**

### **Other Relevant Local Information Affecting Aggregate Supply and Demand**

- 2.3.7. The Authorities have carried out an assessment of the likely demand for aggregates over the JMLP plan period based on anticipated levels of construction of homes and the maintenance and construction of roads. Scenarios were developed taking into account two growth factors (Housing = 28.3%, Construction of roads = 17.9%). Appendix B explains how these factors have been derived. This includes assumptions regarding the level of different aggregate supply related to these uses.
- 2.3.8. Sharp sand and gravel, soft sand and crushed rock are considered separately as they are used for different purposes. This is consistent with Paragraph 226(h) of the NPPF which states that "Minerals planning authorities should plan for a steady and adequate supply of aggregates by ... calculating and maintaining separate landbanks for any aggregate materials of a specific type or quality which have a distinct and separate market."
- 2.3.9. Further other relevant local information includes the fact that mineral resources, including soft sand, are constrained by the National Park and National Landscape designations in West Sussex.

## Sharp Sand and Gravel

- 2.3.10. Based on the 10-year average split of sales (70% soft sand and 30% sharp sand and gravel), the 10 years annual sales data for sharp sand and gravel is 107,711 tonnes. The national PPG states that a three-year average annual sales should also be factored into consideration of a sales trend. The three-year average annual sales figure for sharp sand and gravel in West Sussex is 158,120 tonnes. It must be noted that sales of sharp sand and gravel includes incidental sales from soft sand quarries (which accounts for 55% of the 10-year average, and in 2023, accounted for 27% of total sales).
- 2.3.11. Existing reserves are provided by a single existing permission at Kingsham gravel site which has an estimated remaining yield of circa 422,830 tonnes.
- 2.3.12. Forecast demand scenarios have been established below based on the following assumptions using the data presented in Appendix B.
- Assumption 1: Housing is projected to grow by 28.3%.
  - Assumption 2: Spending on road maintenance/improvements is expected to increase by 17.9% in West Sussex.
  - Assumption 3: Up to 88% of sand and gravel may be used in homes.
  - Assumption 4: Up to 37% of sand and gravel may be used on road maintenance/improvements.
- 2.3.13. The annual demand values associated with each of these scenarios is set out in Table 2. The table also shows the extent of any predicted shortfall having regard to the existing reserves.

**Table 2: Sharp sand and gravel demand scenarios 2024-2033 (tonnes)**

Annual Demand Value	Demand Forecast Scenario 1	Demand Forecast Scenario 2	Demand Forecast Scenario 3
Assumptions applied	None (10-yr. avg. only)	1, 2, 3, and 4	1 and 2
10-year average	107,711	107,711	107,711
Additional demand for housing	n/a	26,824	30,482
Additional demand for roads	n/a	7,134	19,280
Total Annual requirement	107,711	141,669	157,473
Total requirement over Plan period (2023-2033)	1,077,109	1,416,690	1,574,734
Current reserves	422,830	422,830	422,830
Shortfall (+ve)/surplus (-ve)	654,279	993,860	1,151,904

- 2.3.14. The calculated maximum average annual demand (demand forecast scenario 3) is 157,473 tonnes, which suggests that a total of 1.52mt of land-won sharp sand and gravel would need to be supplied to 2033. The minimum calculated landbank for sharp sand and gravel, based on the current reserves against demand forecast scenario 3, is 2.7 years (calculated by dividing the reserve figure by the annual maximum demand figure). **Therefore, using the 10-year average (demand**

**forecast 3), there is a theoretical shortfall of land-won sharp sand and gravel reserves** in West Sussex over the remaining plan period to 2033.

- 2.3.15. National Planning Practice Guidance (PPG Paragraph 064) states that, in addition to considering the 10-year average, MPAs should also consider average annual sales over the previous three years when identifying the general trend of demand. Using the three-year sales average of 150,761 tonnes per annum, the landbank for land-won sharp sand and gravel would be 2.8 years (that is, the reserve figure divided by the three-year average tonnes). **Therefore, using a three-year average, the requirement would be 1,507,613 tonnes (three-year average x 10 years) resulting in a theoretical shortfall of 1,084,783 tonnes over the remaining plan period to 2033.**
- 2.3.16. The adopted Joint Minerals Local Plan contains a criteria-based policy (Policy M1) that allows windfall sites to come forward to meet identified needs and to maintain a steady and adequate supply. Any proposals that do come forward will be judged on their merits against the policies of the Plan and all other material considerations. In determining the need for such proposals, consideration will be given by the County Council to both the 10-year and three-year average calculations of demand.

### **Soft Sand**

- 2.3.17. Based on the 10-year average split of sales (70% soft sand and 30% sharp sand and gravel), the 10 years annual sales data for soft sand is 257,229 tonnes. The three-year average for annual soft sand sales in West Sussex is 218,498 tonnes.
- 2.3.18. Existing reserves are provided by several sites (see Table 6) and currently amount to 889,222 tonnes.
- 2.3.19. Forecast demand scenarios for land-won soft sand have been established using the following key assumptions based on data presented in Appendix B.
- Assumption 1: Housing is projected to grow by 28.3%.
  - Assumption 2: Up to 88% of sand and gravel may be used in the construction of residential dwellings.
- 2.3.20. As road maintenance or improvement works do not involve the use of soft sand, these activities have been excluded from calculations of demand forecasts for soft sand. These demand forecasts build on the 10-year average of 257,229 tonnes, which are set out in Table 3.
- 2.3.21. The annual demand values associated with each of these scenarios is set out in Table 3. The table also shows the extent of any predicted shortfall having regard to the existing reserves.

**Table 3: Soft sand demand forecasts 2024-2033 (tonnes)**

<b>Annual Demand Value</b>	<b>Demand Forecast Scenario 1</b>	<b>Demand Forecast Scenario 2</b>	<b>Demand Forecast Scenario 3</b>
Assumptions applied	None (10-yr. avg. only)	1 and 2	1
10-year average	257,229	257,229	257,229
Additional demand for housing	n/a	64,060	72,796
Total Annual requirement	257,229	321,289	330,025
Total requirement over Plan period (2024-2033)	2,572,289	3,212,891	3,300,246
Current reserves	889,222	889,222	889,222
Shortfall	1,683,067	2,323,669	2,411,024

- 2.3.22. Table 3 suggests that additional supplies of between 1.68-2.41mt of soft sand are needed over the JMLP plan period (to 2033). The maximum landbank, based on the current reserves against the 10-year average, is 3.4 years (calculated by dividing the reserve figure of 889,222 tonnes by the 10-year average of 257,229). The landbank based on the highest forecast annual demand (demand forecast scenario 3) is 2.7 years (889,222 tonnes divided by 330,025 tonnes).
- 2.3.23. National Planning Practice Guidance (PPG Paragraph 064) states that MPAs should also consider average annual sales over the previous three years, to identify the general trend of demand. At present, the 3-year average is lower than the 10-year average, suggested a downward trend of sales. Based on the three-year average of soft sand sales (218,498 tonnes), and current reserves, the landbank is currently 4.1 years. The requirement over the plan period would theoretically be 2.19mt (three-year average x 10), and therefore the shortfall would be 1.30mt.
- 2.3.24. At present, there are seven permitted soft sand sites in the Plan Area, as set out in Table 5. These sites have a total reserve of 889,222 tonnes.
- 2.3.25. The JMLP contains a criteria-based policy for soft sand extraction (Policy M2) and allocates three sites for future soft sand extraction, that have a potential yield of 2.68 million tonnes. Pre-application discussions have taken place for one of the allocations during 2023.

### **Imports and Exports of Land-Won Sand and Gravel**

- 2.3.26. West Sussex imports and exports land-won aggregates from/to surrounding MPAs, as well as further afield, and it is important to understand the current and potential future issues affecting cross-boundary movements of land-won sand and gravel between West Sussex and other neighbouring and more distant mineral planning authorities.
- 2.3.27. A national four-yearly aggregate minerals survey is conducted by the Ministry of Housing, Communities & Local Government (MHCLG) and the British Geological Survey (BGS) which includes analysis of the movements (imports and exports) of aggregates for each MPA in England and Wales. A survey was undertaken in 2020, reporting on sales from 2019 – see [Aggregate Minerals Survey for England and Wales 2019](#). The data presented below comes from the 2019 survey obtained from the BGS. The data from the AM2023 survey on mineral movements is not yet available.
- 2.3.28. Due to confidentiality restrictions, import and export data figures were provided by BGS as a percentage range of total consumption for each Mineral Planning Authority,



to provide an indication of the relative importance of each supplying Mineral Planning Authority. Table 4 shows that in 2019 up to 125,000 tonnes of sand and gravel was imported into West Sussex, whilst up to 97,000 tonnes of sand and gravel was exported from West Sussex. Therefore, for land-won sand and gravel, West Sussex was likely a net-importer in 2019 (of up to 28,000 tonnes).

### Current Supply of Land-Won Sand and Gravel

- 2.3.29. Land-won sand and gravel is currently supplied from six active sites in West Sussex, five of which were operating before the designation of the SDNP, which forms part of the plan area and covers a substantial part of the sand and gravel mineral resource. These sites are presented in Table 5 and shown in Appendix A. The total permitted reserve of land-won sand and gravel in West Sussex is 1,312,052 tonnes.

**Table 4: Origin/destination of land-won sand and gravel imported to/exported from West Sussex, 2019**

Origin/Destination	Imports to West Sussex (tonnes)	Exports from West Sussex (tonnes)
Buckinghamshire & Milton Keynes	0	1-13,759
East Sussex and Brighton and Hove	0	18,400-36,800
Hampshire and Isle of Wight	1-3,059	1-9,469
Kent and Medway	3,060-30,600	0
Surrey	30,600-61,200	3,700-37,000
<b>South East Region Sub Total</b>	<b>33,661-94,859</b>	<b>22,102-97,028</b>
Essex	3,060-30,600	0
<b>Outside South East Region Subtotal</b>	<b>3,060-30,600</b>	<b>0</b>
<b>Overall Total imports/exports (excluding West Sussex consumption)</b>	<b>36,721-125,459</b>	<b>22,102-97,028</b>

**Source:** Data obtained from the British Geological Survey and was based on the 2019 Aggregate Minerals Survey.

**Note:** Ranges are provided due to confidentiality restrictions.

**Table 5: Permitted sand and gravel quarries in West Sussex (2023)****Soft Sand**

Location	Site	Operator	Status
SDNP	West Heath Quarry, West Harting, Petersfield	CEMEX UK Operations	Active – Sand extraction
SDNP	Heath End Quarry, Station Road, Heath End, Petworth	Dudman Group Ltd	Active – Sand extraction
SDNP	Minsted Sandpit, Minsted Lane, Stedham	Dudman Group Ltd	Inactive
West Sussex	Rock Common Sandpit, Washington, Pulborough	Dudman Group Ltd	Inactive
West Sussex	Sandgate Park Quarry, Water Lane, Sullington, Storrington	CEMEX UK Operations	Active – Sand extraction
West Sussex	Washington Sand Pit, Hampers Lane, Sullington	Britaniacrest Recycling Ltd	Active – Sand extraction
West Sussex	Chantry Sand Pit, Chantry Lane, Storrington	Dudman Group Ltd	Active – Sand extraction

**Sharp Sand and Gravel**

Location	Site	Operator	Status
West Sussex	Land at Kingsham, South of Chichester, Chichester	Dudman Group Ltd	Active – Sand & gravel extraction

**NB:** In accordance with the PPG, mineral sites that are subject to a stalled review of their planning conditions have not been included in the assessment of existing reserves.

## Potential Constraints to Future Land-won Supply

- 2.3.30. West Sussex has a number of environmental and landscape designations, including the SDNP which is afforded the highest level of protection by national policy in relation to landscape and scenic beauty. These designations can restrict, and may continue to restrict, opportunities for future minerals development, particularly in regard to land-won extraction. Consideration of future supply from within the SDNP was considered through the soft sand review of the JMLP.
- 2.3.31. In accordance with the national PPG, it is important that the effects of environmental constraints are taken into account, as 'other relevant local information', when considering options for meeting aggregate demand through the Plan period. This is especially pertinent to consideration of the future supply of soft sand as the majority of the resource in West Sussex is located within the SDNP
- 2.3.32. Floodplains, Source Protection Zones (SPZs), secondary and principal aquifers, groundwater depth, geology and smaller abstractions are also constraints which need to be taken into consideration when identifying suitable sites for mineral extraction.
- 2.3.33. Mineral 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 the planning application stage. Such issues need to be addressed to ensure that minerals development does not significantly impact the amenity of local communities.
- 2.3.34. Soft sand has specific applications for which concreting and other aggregate materials are unsuitable, and is most commonly used in mortar. The South Downs Soft Sand Study (2012) states that the Crown Estate 'believe that there is potential for marine sources to provide viable 'soft' sand as an alternative to land based quarrying'. There are sources of marine-won aggregate being used, as a replacement, or through blending, to create mortar. In 2014, in England and Wales, 1.05mt of marine-won aggregate was used in mortar. Of this, 72,000 tonnes was sold in the South East. The SEEAWP South-East England Aggregates Monitoring Report 2017 sets out that some 50,710 tonnes of marine soft sand was sold from South East wharves. Evidence collated via the annual Aggregate Monitoring Surveys shows that during the three-year period 2016-2018, an annual average of around 39,773 tonnes of aggregate sold from West Sussex wharves was sold as soft sand. Not all of this was recorded as marine-won however, with the three-year average of marine-won soft sands being 23,278 tonnes per annum, and remainder being land-won sands. Historically the aggregate available on the South Coast have not been considered to be suitable for soft sand. The West Sussex Joint Minerals Local Plan safeguards sufficient wharf capacity in West Sussex (see Table 20).

## Land-Won Sand and Gravel Summary

### Past to Current Demand

- Sales of land-won sand and gravel have generally fallen during the last 20 years, from a high of 784,000 tonnes in 2004 to as low as 238,577 tonnes in 2014. Sales had fluctuated during the last 10 years, with a high of 449,982 tonnes sold in 2021 and sales falling down to 317,772 during 2023.
- Average sales of land-won sand and gravel over the last 10 years is 376,602 tonnes.
- Average sales of soft sand over the last 10 years is **257,229 tonnes**. The three year average is **218,498 tonnes**.

- Average sales of sharp sand and gravel over the last 10 years are **107,711 tonnes** whilst the average sales over the last three years is 150,761 tonnes.

### Other Relevant Local Information

- For sharp sand and gravel, based on the calculated maximum annual demand (demand forecast scenario 3), there may be insufficient levels of permitted reserves to 2033, with a potential shortfall of up to 1.15mt. The forecasted demand scenarios also account for incidental sales of sharp sand and gravel from soft sand quarries, accounting for 55% of sales during the last 10-years.
- For soft sand, when applying a rolling 10-year average and other relevant local information, an additional **1.68- 2.41mt** are needed over the Plan period (to 2033). For soft sand, when applying the three-year average, shortfalls would be lower, at an additional 1.30mt being required over the plan period.

### Imports and Exports (of Land-Won and Marine-Won Sand and Gravel)

- In 2019 up to 0.125mt of sand and gravel was imported into West Sussex.
- In 2019, up to 0.097mt of sand and gravel was exported from West Sussex.
- As such, West Sussex is likely a **net importer** of sand and gravel.

### Supply

- In 2023, the total permitted reserve of land-won sand and gravel was 1.71mt.
- There are no allocations and a criteria based policy (M1) for sharp sand and gravel in the Joint Minerals Local Plan.
- There are three allocations, two of which are in the SDNP, and a criteria based policy (M2) for soft sand in the Joint Minerals Local Plan.

## 2.4. Marine-Won Sand and Gravel

- 2.4.1. A steady and significant supply of marine-won sand and gravel is landed at wharves in West Sussex. This is a major source of primary aggregate and also a principal alternative source to land-won aggregate. Marine-won sand and gravel landed in the South East of England is primarily used as a replacement for sharp sand and gravel, and is not considered a viable substitute for soft/building sand at this time.
- 2.4.2. The Joint Minerals Local Plan safeguards wharves from development which may prevent or prejudice their operation, and to ensure that a steady and adequate supply of minerals can be maintained. This includes one site that is safeguarded for its potential for future aggregate uses.
- 2.4.3. Although marine-won aggregates were landed at Littlehampton in the past, this activity ceased in 2005 when the aggregate processing plant was removed. The full potential of Railway Wharf, Littlehampton would only be realised if the operator re-established a marine aggregate processing plant, and if navigation/silting problems on the River Arun were resolved to allow continued access for small dredgers. The wharf at Littlehampton has in recent years, up until 2022 been used to import crushed rock by sea, for use in the adjacent Coated Roadstone Plant. This leaves Shoreham as the only port used for landing marine-won sand and gravel in the County.
- 2.4.4. National marine policy is contained within the Marine Policy Statement (MPS) which sets out a framework for preparing marine plans and taking decisions affecting the marine environment. The South Marine Plan (SMP) was adopted in July 2018 and

covers an area which is the second busiest in England for marine aggregate extraction, with a total area that is licensed for aggregate extraction of 139.54 square km<sup>14</sup>. The SMP contains policies to ensure that aggregate extraction licensed areas are protected for that use, whilst those areas with high aggregate potential are also protected.

- 2.4.5. Mineral rights for marine-won sand and gravel are owned by the Crown Estate, who issue licences for dredging activity. Marine-won sand and gravel landed in West Sussex is dredged from the channel in the 'South Coast' region which is the largest dredging region in terms of permitted tonnages. There are currently 15 production licences allowing the extraction of 8.13million tonnes per year, and an estimate of 21 years of production permitted<sup>15</sup>.

### **Use of Marine-Won Aggregate**

- 2.4.6. Marine-won aggregates from the 'South Coast' are predominantly of a similar nature of sharp sand and gravel. They are used for producing concrete, transport infrastructure, replenishing beaches and improving coastal defences, as well as being exported to neighbouring European countries<sup>16</sup>. As marine- and land-won aggregates are geologically similar, they can be easily substituted for one another in many uses.
- 2.4.7. A publication on marine sands in mortars and screeds from the British Marine Aggregate Producers Association (BMAPA) states that the main difference between the majority of land-based sands and marine sands are the presence of chloride and shell. The publication states that there is occasionally resistance by specifiers and purchasers to resist the use of marine-won sands due to their potential to include low levels of chlorides but concludes that marine sands show no aesthetic problems associated with sand source<sup>17</sup>.
- 2.4.8. The Marine Sand and Gravel Resources map produced by BGS and the Crown Estate shows the current and potential marine sand and gravel resources, as well as current licensed areas (see [Offshore Mineral Resource Maps](#)). This indicates that there are some areas of 'fine sand' within the South marine plan onshore and offshore areas, but that the currently licensed areas are in areas of coarse sand and coarse aggregate. The accompanying report states that the map delineates areas within which potentially workable minerals may occur but that this takes no account of planning constraints that may limit their working and that the economic potential of individual sites can only be proved by a detailed evaluation programme<sup>18</sup>.
- 2.4.9. Research undertaken provided the Authorities anecdotal evidence that suggests mortar manufacturers in the south east may be using marine-won sand in their mortar products in place of land-won soft sand. The use of marine-won sand in mortar is common place in other parts of England, however there is no detailed evidence of this taking place in the south east.

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<sup>14</sup> Crown Estate (2023). Marine Aggregates Extraction 2022 – 25th Annual Report

<sup>15</sup> Crown Estate (2023). Marine Aggregates Annual Review 2023

<sup>16</sup> Crown Estate (2018). Marine Aggregates Extraction 2017 – 20th Annual Report

<sup>17</sup> British Marine Aggregate Producers Association

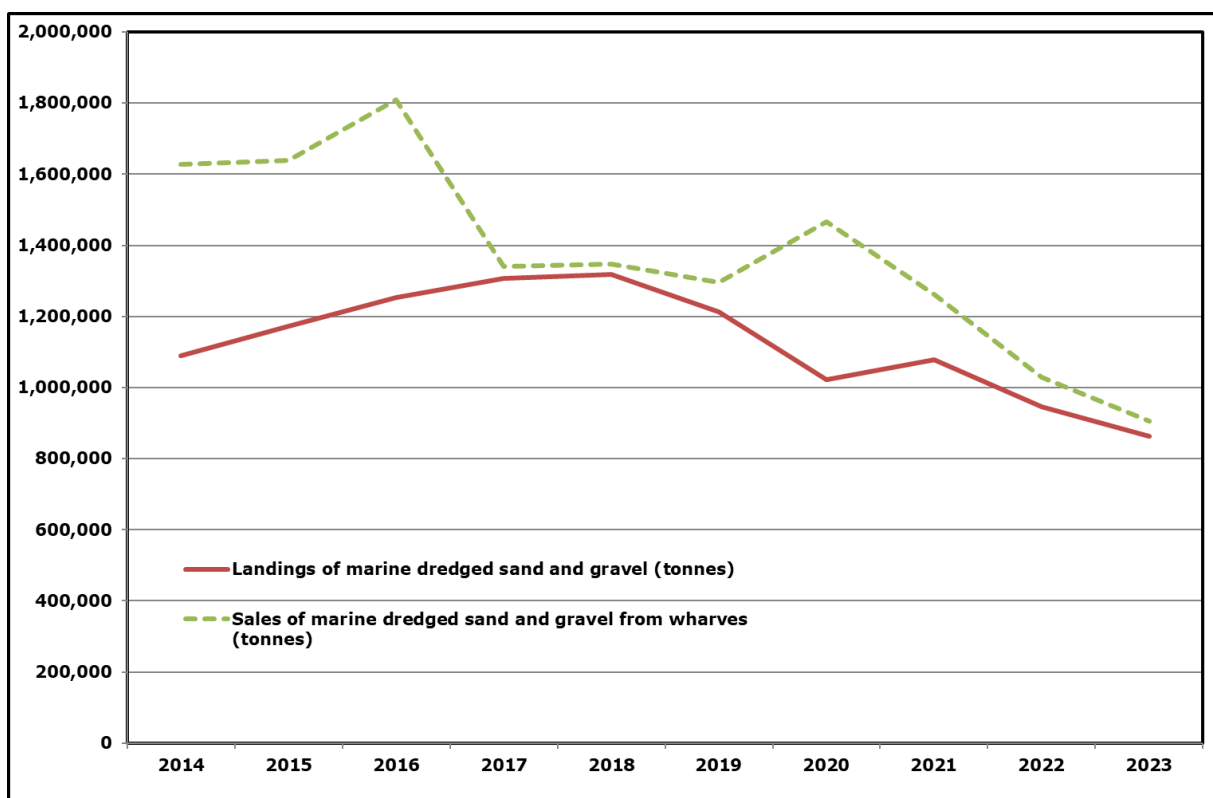
<sup>18</sup> British Geological Survey (2013) The Mineral Resources of the English Channel and Thames Estuary

## Pattern of Previous Landings and Sales and Current Demand for Marine-Won Aggregate

- 2.4.10. Landings of marine-won aggregate at wharves in West Sussex have stayed relatively steady over the last 10 years, peaking at 1.32 million tonnes in 2018. There has been a general fall in landings since 2018, with a 10-year low of landings in 2023, down to 0.86mt.
- 2.4.11. Landings of marine-won aggregate at wharves in West Sussex make a significant contribution to overall aggregate supplies in West Sussex and neighbouring authorities (particularly East Sussex and Brighton and Hove).

**Table 6: Landings and sales of marine-won sand and gravel at West Sussex Wharves 2013-2022**

Year	Landings of Marine-Won Sand and Gravel (tonnes)	Sales of Marine-Won Sand and Gravel from Wharves (tonnes)
2014	1,090,138	1,626,551
2015	1,173,304	1,639,146
2016	1,254,255	1,809,675
2017	1,307,447	1,340,189
2018	1,318,508	1,347,922
2019	1,213,456	1,295,248
2020	1,022,627	1,466,938
2021	1,078,498	1,262,612
2022	945,182	1,027,981
2023	862,818	905,978
<b>3-year average</b>	<b>1,065,524</b>	<b>962,166</b>
<b>10-year average</b>	<b>1,126,623</b>	<b>1,372,224</b>



**Figure 3: Landings and sales of marine-won sand and gravel at West Sussex Wharves 2014-2023**

### **Future Demand for Marine-Won Sand and Gravel**

- 2.4.12. Forecasts of future demand for marine-won aggregate are based on landings data (provided by the Crown Estate) as this removes the element of double counting, whereby some operators of wharves are buying aggregate from other wharf operators, and reporting their sales. Landing data therefore provides a more accurate picture of future demand.
- 2.4.13. Different scenarios on future demand have been derived based on different mixes of the following assumptions.
- Assumption 1: Housing is projected to grow by 28.3%.
  - Assumption 2: Spending on road maintenance/improvements is expected to increase by 17.9% in West Sussex.
  - Assumption 3: Up to 88% of sand and gravel may be used in homes.
  - Assumption 4: Up to 37% of sand and gravel may be used on road maintenance/improvements.

### **Other Relevant Local Information**

- 2.4.14. A large amount of marine-won sand and gravel is exported to Brighton & Hove and East Sussex, where housing growth is predicted to grow significantly. For the purposes of forecasting demand, the projected growth of housing figure for West Sussex and neighbouring areas is applied (28.3%) has been used because it is considered a fair reflection, particularly as the actual number of homes is considerably higher in other areas. These forecasts build on the 10-year average of annual landings (1,126,623 tonnes) and are set out in Table 7.

**Table 7: Demand forecast scenarios for marine-won sand and gravel based on landings 2024-2033 (tonnes per annum)**

<b>Annual Demand Value</b>	<b>Demand Forecast Scenario 1(B)</b>	<b>Demand Forecast Scenario 2(B)</b>	<b>Demand Forecast Scenario 3(B)</b>
Assumptions applied	None (10-yr. avg. only)	1, 2, 3, and 4	1 and 2
10-year average	1,126,623	1,126,623	1,126,623
Additional demand for housing	n/a	280,574	318,834
Additional demand for roads	n/a	74,616	201,666
Total Annual requirement	1,126,623	1,481,814	1,647,123

- 2.4.15. The demand forecast based on landings data shows that demand could be as high as 1,647,123 tonnes per annum. If this is compared to the estimated capacity at wharves in West Sussex, there would be additional capacity available. The wharves do however also import crushed rock, therefore total annual capacity requirements for wharves are discussed later in this report.

### **Imports and Exports**

- 2.4.16. Shoreham Harbour in West Sussex supplies large amounts of marine-won sand and gravel (expected to be around 50%) to East Sussex and Brighton & Hove, which means development in these areas is heavily dependent on landings of marine-won sand and gravel at these wharves. Imports and exports of marine-won sand and gravel also occur between West Sussex, Hampshire, and Kent. In 2019, West Sussex imported materials from Portsmouth, London (namely the Borough of Barking & Dagenham), and Cardiff. West Sussex also exported materials to Surrey.

### **Current Supply of Marine-Won Sand and Gravel**

- 2.4.17. The mineral wharves in West Sussex are primarily used for landing marine-won sand and gravel; however, they also land a modest proportion of crushed rock. The number of wharves within Shoreham Harbour have reduced in number in recent years. The JMLP safeguards a number of wharves, including one for its potential capacity. Capacity of West Sussex wharves is 2,070,000tpa, a reduction in capacity following the closure of one wharf which relocated from the Western Harbour Arm in Shoreham to the Eastern Harbour Arm (to Britannia Wharf), which falls within the Brighton & Hove authority area.

### **Marine-Won Sand and Gravel Summary**

- The South Marine Plan areas are the busiest in England for marine aggregate extraction.
- 8,13mt of material is permitted for extraction per annum from licences within the 'South Coast Region'.

### **Pattern of Previous Landings and Sales and Current Demand for Marine-Won Aggregate**

- Landings and sales on marine-won sand and gravel in West Sussex increased steadily between 2013 (1.03mt) and 2018 (1.32mt), after which there has been a general decline in sales, to a low of 0.86mt landed in 2023.



- The 10-year average of annual marine-won sales is 1,372,224 tonnes and 1,126,623 tonnes of landings.
- For the purposes of assessing demand, landings data has been used because this eliminates an element of double counting that has been identified.

### **Other Relevant Local Information**

- The demand forecast based on landings data shows that demand could be as high as 1.65 million tonnes per annum.

### **Imports and Exports**

- Marine-won aggregates make a significant contribution to aggregate supply in West Sussex and neighbouring authorities (particularly East Sussex and Brighton and Hove) due to declining supplies from land-won sources in the area.

### **Wharf Capacity**

- The capacity at wharves in West Sussex has fallen from 2,274,000 tonnes per annum down to 2,070,000 tonnes per annum since the adoption of the JMLP. This is following the close of one wharf, which has relocated to another part of Shoreham Harbour (in Brighton & Hove).
- Based on maximum landings of marine-won sand and gravel from West Sussex wharves between 2014 and 2023 (1,318,508 tonnes in 2018), there would be a theoretical minimum surplus capacity of 751,492 tonnes. This does not account for wharf capacity being utilised for landing crushed rock, which is addressed later in this document.
- Marine-won landings ceased in Littlehampton in 2005, although crushed rock landed at the wharf continues to serve the adjacent coated roadstone plant.

## **2.5. Sand and Gravel Imported by Rail**

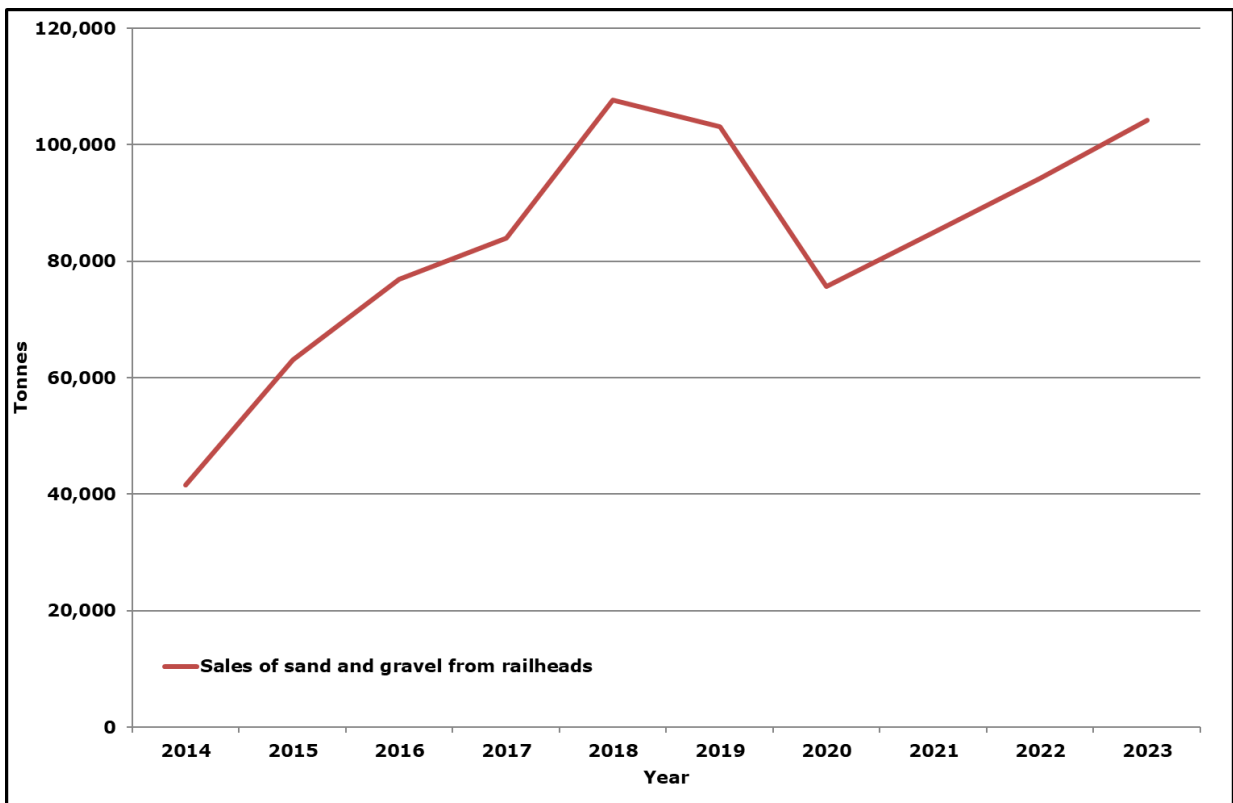
- 2.5.1. A relatively small amount of sand and gravel is imported into West Sussex by rail which could be either from marine-won or land-won sources (sharp sand and gravel, or soft sand). Evidence from stakeholder engagement in 2008/09 showed that most of the sand and gravel that came into one of the Crawley depots was bagged for builder's merchants or collected from the depot by building contractors. The vast majority of materials are delivered to fairly local destinations within a 20-mile radius due to the haulage costs.

### **Pattern of Previous Sales and Current Demand for Sand and Gravel Imported by Rail**

- 2.5.2. Table 8 and Figure 4 show that sales of sand and gravel from railheads within West Sussex have fluctuated over the last 10-year period, peaking at 107,678 in 2018. The 10-year average annual sales of sand and gravel from railheads is 87,775 tonnes and the three-year average is 84,986 tonnes.

**Table 8: Imports of sand and gravel to West Sussex railheads 2014-2023**

Year	Sales of Sand and Gravel from Railheads (tonnes)
2014	41,521
2015	63,019
2016	76,961
2017	83,947
2018	107,678
2019	103,084
2020	75,715
2021	84,951
2022	94,291
2023	104,242
<b>3-Year Average</b>	<b>94,495</b>
<b>10-Year Average</b>	<b>83,541</b>



**Figure 4: Imports of sand and gravel to West Sussex railheads 2014-2023**

### **Future Demand for Sand and Gravel Imported by Rail**

2.5.3. Two demand forecasts have been created taking account of the 10-year average of sales (83,541 tonnes) and other relevant local information set out in the following assumptions.

- Assumption 1: Housing is projected to grow by 28.3% in West Sussex.
- Assumption 2: Spending on road maintenance/improvements is expected to increase by 17.9% in West Sussex.

- Assumption 3: Up to 88% of sand and gravel may be used in homes.
- Assumption 4: Up to 37% of sand and gravel may be used on road maintenance/improvements.

2.5.4. The demand forecast scenarios are set out in Table 9.

**Table 9: Demand forecasts for rail imported sand and gravel 2024-2033 (tonnes per annum)**

Annual Demand Value	Demand Forecast Scenario 1	Demand Forecast Scenario 2	Demand Forecast Scenario 3
Assumptions applied	None (10-yr. avg. only)	1, 2, 3, and 4	1 and 2
10-year average	83,541	83,541	83,541
Additional demand for housing	n/a	20,805	23,642
Additional demand for roads	n/a	5,533	14,954
Total Annual requirement	83,541	109,879	122,137

2.5.5. Table 9 indicates that future demand for sand and gravel being imported by rail to West Sussex railheads may be as high at 122,137 tonnes per annum.

### **Current Supply of Rail Imported Sand and Gravel**

2.5.6. There are five railheads in West Sussex, one in Chichester, one in Ardingly and three in Crawley all of which are safeguarded in the Joint Mineral Local Plan.

2.5.7. The West Sussex Wharves and Railheads Study (2014) states that a total maximum capacity of 1,380,000 tonnes<sup>19</sup>. The annual aggregate surveys include a request for updates from site operators, and for rail heads, the capacity is now estimated to be 1,490,000 tonnes per annum. All but one of the railheads could probably improve throughput if more train pathways were available. The Rail Freight Strategy<sup>20</sup> predicts long term growth potential in bulk aggregate movements, reflecting new building developments (e.g., housebuilding) and large infrastructure projects (e.g., High Speed 2, road building, Crossrail 2 and new nuclear power stations). The strategy identifies that the constraint to rail freight movement will include the availability of rail freight terminals for handling bulk materials, in appropriate locations, highlighting the importance of protecting rail terminals.

### **Rail Imported Sand and Gravel Summary**

#### **Pattern of Previous and Current Demand for Rail Imported Sand and Gravel**

- Relatively small amounts of sand and gravel were imported into West Sussex by rail during the previous three years, with a high in 2023 of 104,242 tonnes. Rail imports peaked at 225,303 tonnes in 2009.
- The 10-year average sales of sand and gravel from railheads is 83,541 tonnes.

<sup>19</sup> Based on Scenario R1 in the West Sussex Wharves and Railheads Study (2014) which safeguards all five railheads.

<sup>20</sup> Department for Transport (2016) Rail Freight Strategy: Moving Britain Ahead

### **Future Demand**

- The demand for sand and gravel being imported by rail to West Sussex railheads to 2033 may be as high at 122,137 tonnes per annum.

### **Railhead Capacity**

- West Sussex has five railheads with a potential total capacity of 1,490,000 tonnes.
- There is a sufficient capacity to allow for an increase in rail imports of sand and gravel, however this is addressed further in this document as crushed rock is also imported by rail.

## **2.6. Crushed Rock**

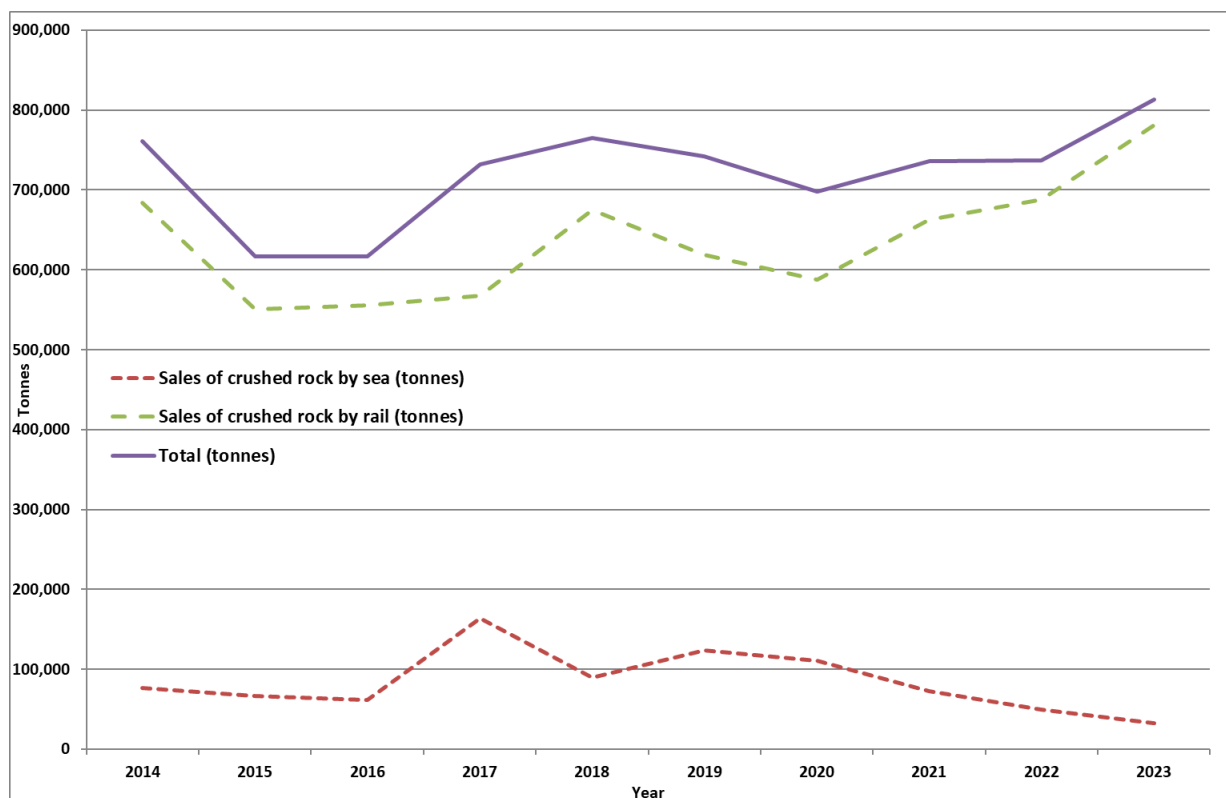
- 2.6.1. Crushed rock is generally used for roadstone and rail ballast. West Sussex does not have any natural hard rock resources and relies on rail and sea imports of hard rock, such as limestone and granite, in order to meet local demand for this material.
- 2.6.2. There are three sites within West Sussex where crushed rock is used to make coated roadstone. These are strategically located close to rail and wharf infrastructure: Ardingly Rail Depot, EWS Goods Yard in Crawley and Littlehampton Wharf, Littlehampton.

### **Pattern of Previous and Current Demand for Crushed Rock**

- 2.6.3. Sales of crushed rock from wharves have been more variable over the 10-year period than those from railheads (Table 10) with a high of 164,017 tonnes in 2017, down to a 10 year low of 32,114 tonnes sold in 2023. The 10-year average annual sales (2014-2023) of crushed rock from wharves is 84,700 tonnes. The three-year annual sales average is lower than the 10-year average, at 51,404 tonnes
- 2.6.4. Crushed rock sales from railheads have been steadily increasing since 2009 (Table 10 and Figure 5), with a ten year high in 2023. The 10-year average sales of crushed rock from railheads is 637,123 tonnes. The three-year annual sales average is higher, at 710,959 tonnes.

**Table 10: Sales of crushed rock at West Sussex wharves and railheads 2014-2023**

Year	Crushed Rock Aggregate Sales from Wharves (tonnes)	Sales of Crushed Rock from Railheads (tonnes)	Total (tonnes)
2014	76,670	684,271	760,941
2015	66,422	550,536	616,958
2016	61,747	555,539	617,286
2017	164,017	567,584	731,601
2018	89,986	674,770	764,756
2019	123,393	618,346	741,739
2020	110,558	587,310	697,868
2021	72,692	663,264	735,956
2022	49,905	688,053	737,958
2023	32,114	781,559	813,673
<b>3-Year Average</b>	<b>51,404</b>	<b>710,959</b>	<b>762,362</b>
<b>10-Year Average</b>	<b>84,700</b>	<b>637,123</b>	<b>721,824</b>

**Figure 5: Sales of crushed rock at West Sussex wharves and railheads 2014-2023**

### Future Demand for Crushed Rock Imports from Wharves

2.6.5. Four demand forecast scenarios have been created which take account of the 10-year average of sales (84,700), and other relevant local information:

- Assumption 1: Housing is projected to grow by 28.3% in West Sussex
- Assumption 2: Spending on road maintenance/improvements is expected to increase by 17.9% in West Sussex

- Assumption 3: Up to 36% of crushed rock may be used in homes
- Assumption 4: Up to 81% of crushed rock may be used on road maintenance/improvements
- Assumption 5: Spending on road construction/maintenance in Brighton & Hove and East Sussex is projected to increase by 51.7% (applied to 1% of total sales to account for exports in previous years)

2.6.6. The calculations of demand are set out in Table 11, which shows that the likely demand for crushed rock being landed at West Sussex wharves may be as high as 124,270 tonnes per annum. The capacity of wharves in West Sussex is 2,070,000 tonnes per annum, therefore there is sufficient capacity to accommodate further demand for imports, however this is addressed further in this report wharves are also used for landing marine-won sand and gravel.

**Table 11: Demand forecast scenarios for marine landed crushed rock 2024-2033**

<b>Annual Demand Value</b>	<b>Demand Forecast Scenario 1</b>	<b>Demand Forecast Scenario 2</b>	<b>Demand Forecast Scenario 3</b>	<b>Demand Forecast Scenario 4</b>	<b>Demand Forecast Scenario 5</b>
Assumptions applied	None (10-yr. avg. only)	1-4	1 and 2	1-5	1, 2 and 5
10-year average	84,700	84,700	84,700	84,700	84,700
Additional demand for housing	n/a	8,629	23,970	8,629	23,970
Additional demand for roads	n/a	12,281	15,161	12,719	15,599
Total Annual requirement	84,700	105,610	123,832	106,048	124,270

## Future Demand for Crushed Rock Imports to Railheads

- 2.6.7. Two demand forecasts have been created for rail imports of crushed rock, taking account of the 10-year average of sales (637,123 tonnes) and other relevant local information set out in the following assumptions:
- Assumption 1: Housing is projected to grow by 28.3% in West Sussex
  - Assumption 2: Spending on road maintenance/improvements is expected to increase by 17.9% in West Sussex
  - Assumption 3: Up to 36% of crushed rock may be used in homes
  - Assumption 4: Up to 81% of crushed rock may be used on road maintenance/improvements
- 2.6.8. Table 12 shows the calculations of demand and indicates that the likely demand for crushed rock import to West Sussex railheads may be as high as 935,297 tonnes per annum. The capacity of railheads in West Sussex is 1,380,000 tonnes per annum. As railheads are used to import both crushed rock and sand and gravel, total capacity is discussed later in this report.

**Table 12: Demand forecasts for rail imported crushed rock 2022-2033**

Annual Demand Value	Demand Forecast Scenario 1	Demand Forecast Scenario 2	Demand Forecast Scenario 3
Assumptions applied	None (10-yr. avg. only)	1, 2, 3, and 4	1 and 2
10-year average	637,123	637,123	637,123
Additional demand for housing	n/a	64,910	180,306
Additional demand for roads	n/a	92,376	114,045
Total Annual requirement	637,123	794,410	931,474

## Imports and Exports of Crushed Rock

- 2.6.9. The sources of crushed rock being imported into West Sussex are set out in Table 13, and are based on Aggregate Minerals Survey (2019) data provided by BGS. This is in the form of percentage ranges, due to confidentiality restrictions. The data shows that that Somerset (70-80%) is the main source of crushed rock being consumed in West Sussex. Crushed rock is imported by sea to Littlehampton Port to service the adjacent coated roadstone plant. Total imports of crushed rock into West Sussex have remained relatively steady between 2014 and 2023, with a peak of sales in 2023, of 781,559 tonnes, up from 688,053 tonnes in 2022..



**Table 13: Crushed rock imports to West Sussex (2019)**

<b>Origin/Destination</b>	<b>Imports to West Sussex (tonnes)</b>
Outside England and Wales	5,560-55,600 (10-20%)
Gloucestershire County Council	Up to 5,559 (<1%)
North Somerset Council	Up to 5,559 (<1%)
Somerset County Council	389,200-444,800 (70-80%)
Cambridgeshire County Council	Up to 5,559 (<1%)
Leicestershire County Council	5,560-55,600 (1-10%)
North Yorkshire County Council	5,560-55,600 (1-10%)
Shropshire Council	5,560-55,600 (1-10%)
Northumberland County Council	Up to 5,559 (<1%)
Northumberland National Park	Up to 5,559 (<1%)
Powys	Up to 5,559 (<1%)
<b>Total</b>	<b>556,000 (tonnes consumed)</b>

### **Current Supply of Crushed Rock**

- 2.6.10. As set out earlier the wharves have a potential capacity to land 2,070,000 tonnes of aggregate imports. With regard to railheads, they have a total maximum capacity of 1,490,000 tonnes. As railheads are also used for importing sand and gravel, the total capacity requirements are considered later in this document.

### **Crushed Rock Summary**

#### **Pattern of Previous and Current Demand for Crushed Rock**

- The vast majority of crushed rock used in West Sussex is imported via railheads, with some imports via wharves.
- Sales of crushed rock from **railheads** were at a 10-year high in 2023 (813,673 tonnes).. The 10-year annual sales average is currently 637,123 tonnes and the three-year average is 710,959 tonnes.
- Sales of crushed rock from **wharves** in West Sussex were steady between 2013-2016, after which they increased to a 10-year high of 164,017 tonnes in 2017. Sales have generally been falling since, with a 10-year low of 32,114 tonnes in 2023. The 10-year annual sales average is currently 84,700 tonnes and the three-year average is 51,404 tonnes.

## **Future Demand**

- Demand for crushed rock being landed at West Sussex wharves may be as high at 124,270 tonnes per annum.
- Demand for crushed rock being imported by rail to West Sussex railheads may be as high at 931,474 tonnes per annum.

## **Capacity for Importing Crushed Rock**

- West Sussex railheads have a potential capacity of 1,490,000 tonnes, indicating that there is sufficient capacity to meet future demand for imports of crushed rock.
- West Sussex wharves also have capacity to land future demand for imports of crushed rock.

## **2.7. Secondary/Recycled Aggregates**

- 2.7.1. Aggregates sourced from waste materials can be used to substitute primary aggregates in a range of applications such as base layers for new developments and road construction. Higher quality recycled aggregates can also be used in the production of concrete for use in non-load bearing applications. Secondary and recycled aggregates can therefore reduce the demand for primary aggregates and so this LAA provides an assessment of the contribution that these materials may make to the overall supply of aggregates in the area.
- 2.7.2. Sources of secondary and recycled aggregates are provided below.
- **Secondary Aggregates:** These come from by-products of industrial or mineral extraction processes and may be used either in raw condition or require processing. Secondary aggregates can be further sub-divided into manufactured and natural, depending on their source. Examples of manufactured secondary aggregates from industrial by-products are Incinerator Bottom Ash (IBA) which can be crushed to produce aggregate. Naturally occurring secondary aggregates generally come from mineral extraction and include china clay sand and slate aggregate. (Source: [WRAP](#).)
  - **Recycled Aggregates:** These usually comprise material derived from construction and demolition wastes, such as builders' rubble, bricks and tiles, excavation waste (such as stone and rock). These materials generally require processing (crushing and screening) but also include material recovered from surface dressing of highways (road planings).
- 2.7.3. While these materials come from distinct and discrete sources they are generally counted together being from non-primary sources.

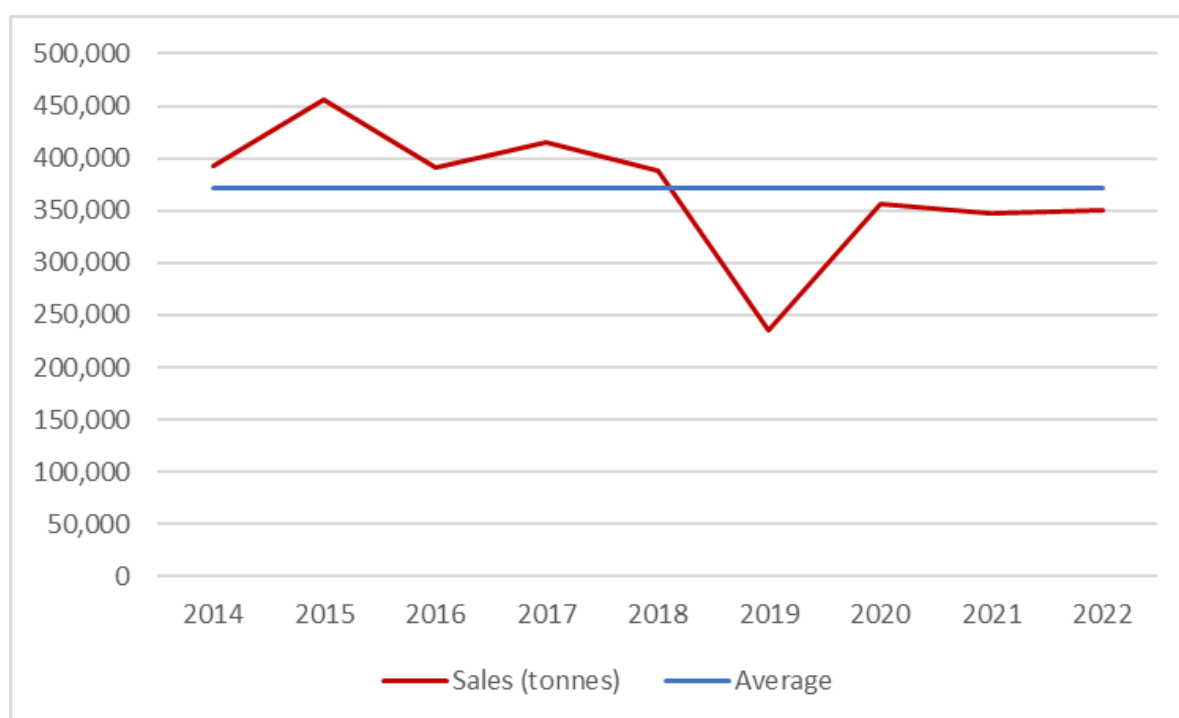
## **Pattern of Previous and Current Demand for Recycled and Secondary Aggregate**

### **Recycled Aggregate**

- 2.7.4. The recorded sales figures between 2014 and 2023 for recycled aggregates in West Sussex are set out in Table 14. This shows that sales of recycled aggregates have been relatively stable with a peak in 2016 (456,000 tonnes) and an apparent decline since. There was a significant reduction of recycled aggregate production in 2020, that may be attributed to the Covid-19 pandemic, whilst sales have recovered in recent years.

**Table 14: Sales of recycled aggregates in West Sussex 2014-2023**

Year	Sales (tonnes)
2014	377,000
2015	393,000
2016	456,000 <sup>21</sup>
2017	391,000
2018	415,000
2019	388,000
2020	236,000
2021	357,000
2022	348,000
2023	351,000
<b>3-Year Average (2021-2023)</b>	<b>352,000</b>
<b>10-Year Average (2014-2023)</b>	<b>371,000</b>

**Figure 6: Sales of recycled aggregates in West Sussex 2014-2023**

### Current Capacity for Production of Recycled Aggregates

- 2.7.5. Recycled aggregate can be produced on sites at which demolition waste is produced by either using a mobile crusher and supplied directly, at intermediate temporary sites using a mobile crusher, or at a static site usually a mineral working or a waste management site. In 2023 there were estimated to be 19 static sites within West Sussex that have permission to produce recycled aggregates – capacity is provided by either dedicated CDEW recycling sites or at transfer stations. Table 15 shows that

<sup>21</sup> Figures derived using a revised methodology prepared as part of the Baseline for C&I & CDEW waste generated in West Sussex from 2017 onwards.

a total capacity of 751,000tpa for recycled aggregate production in permitted in West Sussex. Details of the sites can be found in the latest Annual Monitoring Report. It is important to note that since the assessment of capacity relates to consented static sites only the actual overall capacity for aggregate recycling in the County is likely to be significantly higher than that indicated above due to the contribution mobile and temporary production capacity might make.

**Table 15: Permitted sites able to produce recycled aggregate<sup>22</sup>**

Site Type	Capacity (tpa)
Dedicated Aggregate recycling sites	461,000
Aggregate recycling at transfer stations	290,000
<b>Total Capacity</b>	<b>751,000</b>

- 2.7.6. Comparison between the difference of the 10-year average of sales (371ktpa) and estimated capacity (751ktpa) shows that **capacity for producing recycled aggregate in the county appears to be underutilised**. Demand scenarios have not been applied to this source of aggregate supply because the future availability of recycled aggregates may be constrained by availability of feedstock which is reliant on construction and demolition activity. In addition, the use of mobile processing facilities at development sites means that supply may respond to demand relatively quickly without express consent being required. Aggregate recycling sites within West Sussex are safeguarded through the Waste Local Plan (2014) to ensure continuity of supply.

### Secondary Aggregates

- 2.7.7. In West Sussex, the by-products from chalk and sandstone have been used as secondary aggregates. Other sources of secondary aggregate extraction include bottom ash from thermal treatment facilities at the following sites.
- Planning permission has been granted for a waste treatment facility at Ford which includes a 140,000tpa gasification plant generating energy from waste (Ref: WSCC/096/13/F) (not operational). The gasification process is estimated to produce 21,000 tonnes of residue ash each year which is to be transported off-site for recycling or concrete product manufacture.
  - The bottom ash from the Energy from Waste plant at Lancing is processed into Incinerator Bottom Ash Aggregates (IBAA).
  - Former Wealden Brickworks, Langhurstwood Road, Horsham.
  - (WSCC/015/18/NH) (not operational). Recycling, recovery and renewable energy facility and ancillary infrastructure.
- 2.7.8. An estimate of the likely capacity for production of secondary aggregates has been calculated and is estimated to be around 11,000tpa presented in Table 16. It presents the current capacity that exists within the County and a further scenario that includes the permitted sites at Ford and Horsham. Table 16 shows that there

<sup>22</sup> **Dedicted Aggregate Recycling Sites** – capacity for three of the sites is based on the EA Permit 75,000tpa which may represent a capacity that the site cannot theoretically reach. **Aggregate Recycling at Transfer Stations** - This figure is 75% of the total amount of CD&E waste that these sites manage which is an average of the estimated recycling rate achieved.

could be capacity for producing an estimated 72,000 tpa of secondary aggregates in the County.

**Table 16: Secondary aggregate capacity scenarios**

<b>Secondary Aggregate Recycling Capacity</b>	<b>Capacity Scenario 1 (Current Situation – Lancing Energy from Waste Plant) (tonnes)</b>	<b>Capacity Scenario 2 (Energy from Waste Plant + Ford Site + Horsham 3Rs) (tonnes)</b>
Lancing Energy from Waste	11,000	11,000
Ford Energy from Waste	-	21,000
Horsham 3Rs Energy from Waste		40,000
<b>Total</b>	<b>11,000</b>	<b>72,000</b>

### **Recycled and Secondary Aggregates Summary**

- 2.7.9. Sales of recycled aggregates peaked at 456,000 tonnes in 2016. Data indicates that supply has been relatively steady since 2014. Sales fell significantly in 2020 which may be attributed to the Covid-19 pandemic. Sales have recovered in recent years.
- The 10-year average production of recycled aggregate is **371,000 tonnes**.
  - There is one site in West Sussex producing 11,000 tonnes of bottom ash used as a secondary aggregate.
  - A total of 751,000tpa of capacity for recycled aggregates production is likely to be available within the County which indicates that **capacity within the county is underutilised**.
  - There could be between **11,000tpa and 72,000tpa** of additional secondary aggregates production capacity in the County.

### **3. Balance between Demand and Supply**

#### **3.1. Estimating Demand**

- 3.1.1. As previously stated, to be consistent with the NPPF the starting point for estimating future demand is information on sales over the previous 10 years and 'other relevant local information' (such as future demand for housing and other infrastructure). The authorities have considered 'other relevant local information' to calculate a figure for aggregate demand that factors in likely local changes in use of aggregate over the JMLP plan period, to 2033. A summary of the resulting forecasted demand (or Annual Provision Rates (APR)) are shown in Table 17. The APRs that are applied are those based on the highest levels of demand (i.e., 10-year average + the demand scenarios that result in largest theoretical increase in demand). Table 17 also presents the total estimated likely available supplies for aggregates and the net supply requirements.
- 3.1.2. West Sussex, and neighbouring authorities, are heavily reliant on imports to its wharves and railheads for crushed rock and marine sand and gravel. Indeed, imports of marine-won sand and gravel to the county appear to have compensated for reduced land-won sharp sand and gravel extraction. Historically soft sand in West Sussex has largely been met from land-won sources though data suggests that marine-won sand could possibly provide a source of supply in future (AM15, AM16, AM17). There is sufficient capacity in wharves and railheads to meet future demands for the importation of crushed rock and sand and gravel (see Table 17).
- 3.1.3. There are falling reserves of sharp sand and gravel, and to meet forecasted demand for this aggregate type to 2033, there may be need to permit additional sites for extraction. The JMLP contains a criteria based policy for sharp sand and gravel extraction (Policy M1).
- 3.1.4. Soft sand has particular uses which are related to its particular qualities and so this is considered separately from sharp sand and gravel. As shown in Table 17, the demand for soft sand (based on average 10-year annual sales and other local relevant information) could mean a total of 3,300,246 tonnes may be required. Current permitted reserves are 889,222 tonnes meaning there may be a shortfall of up to 2.41 million tonnes of soft sand to 2033. The JMLP contains three allocations for future soft sand extraction, which have a combined potential yield of up to 2.68mt.
- 3.1.5. There is significant capacity for increasing levels of recycled and secondary aggregate production, with the 10-year annual average of production currently 362,000 tonnes, whilst the capacity is 613,000 tonnes per annum.

#### **3.2. Proposed Monitoring Arrangements**

- 3.2.1. Provision to meet demand for aggregate, as set out in this LAA is considered in the JMLP which was prepared jointly with the South Downs National Park Authority, and adopted in July 2018 and partially reviewed in March 2021. The LAA will be updated on an annual basis as part of the Annual Monitoring Report.

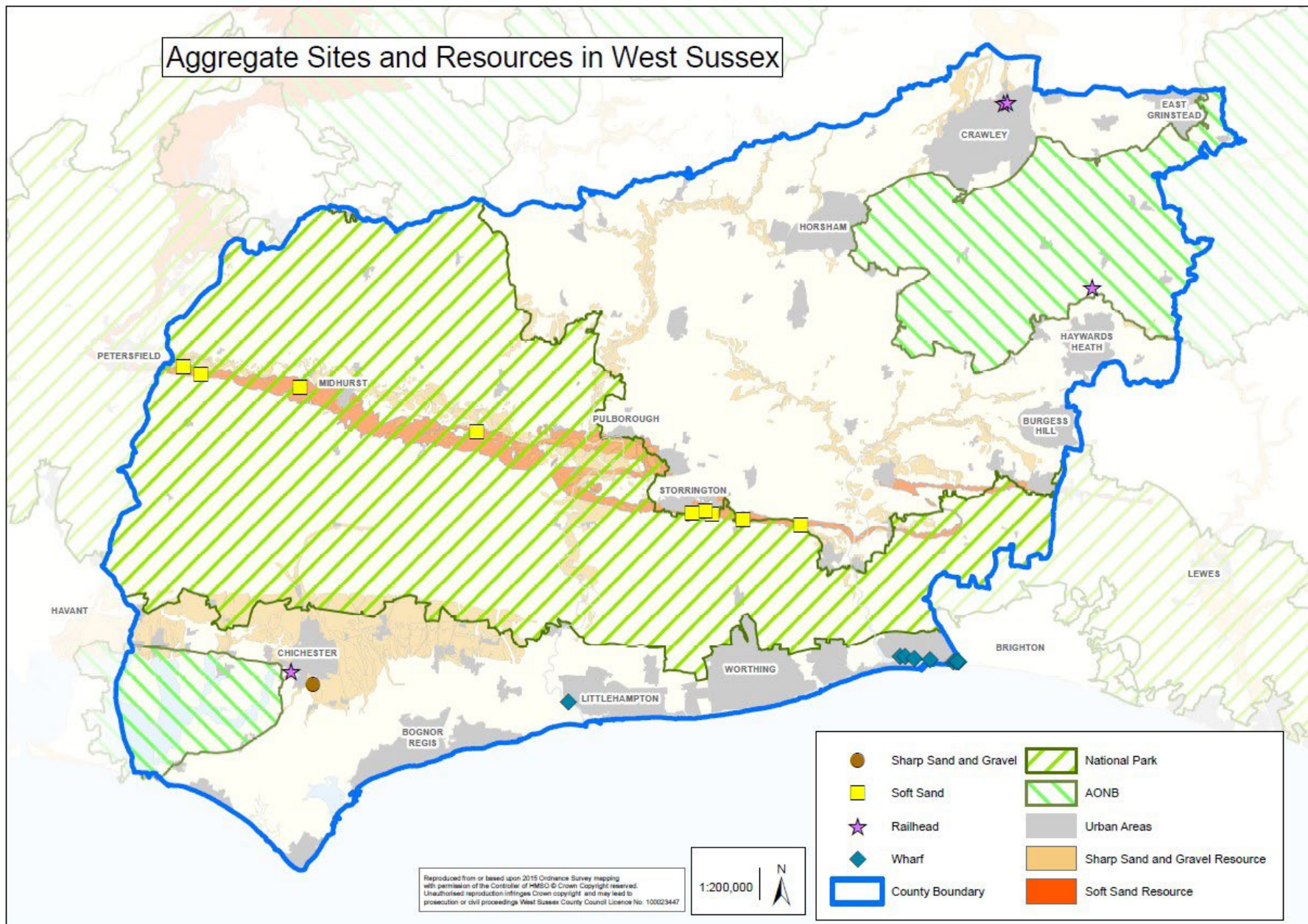
**Table 17: Total demand for all sources of aggregate over the JMLP period (2024-2033)**

Aggregate	10-Year Average Sales/Landings (2014-2023) (tonnes)	Total Requirement to 2033 based on 10-Year Average sales/landings (tonnes)	APR (maximum estimated annual requirement based on highest demand forecasts)	Total Maximum Requirement to 2033 (based on APR)	Total Estimated Supply (tonnes) or Capacity	Net Additional Requirement (tonnes) (-ve values = surplus)
Sharp Sand and Gravel	107,711	1,077,109	157,473	1,574,734	422,830 (Permitted Reserves)	1,151,904
Soft Sand	257,229	2,572,289	330,025	3,300,246	889,222 (Permitted Reserves)	2,411,024
Marine-won Sand and Gravel	1,126,623 (landings)	-	1,647,123	-	Total annual operational capacity – 2,070,000	Annual capacity surplus – 298,607
Crushed Rock (landed at wharves)	84,700(sales)	-	124,270	-	-	-
Crushed Rock (rail imported)	637,123	-	931,474	-	Total annual capacity – 1,490,000	Annual capacity surplus – 436,389
Sand and Gravel (rail imported)	83,541	-	122,137	-		
Secondary and Recycled Aggregates	371,000	-	-	-	751,000	Annual capacity surplus – 380,000

## **Appendix A: LAA Map**



# Aggregate Sites and Resources in West Sussex



## **Appendix B: Effect of Housing and Road Construction on Aggregate Supply and Demand**

B1. The CLG/BGS (June 2019) Mineral Planning Factsheet: Construction Aggregates sets out an overview of aggregate supply in the UK, and its main purpose is to inform the land use planning process. Table 1 of the factsheet sets out the principal uses of primary aggregates in Great Britain, based on sales in 2014. This has been used to calculate the amounts of sand and gravel (including soft sand) and crushed rock that may be used in both housing and highways maintenance/improvements. The data indicates that:

- 88% of total sand and gravel (including soft sand) sold may be used in the construction of homes;
- 36% of total crushed rock sold may be used in the construction of homes;
- 37% of total sand and gravel (including soft sand) may be used in the construction and maintenance of roads;
- 81% of total crushed rock sold may be used in the construction and maintenance of roads.

B2. In light of this, when assessing the future demand for aggregate it is considered reasonable to assume that changes to the construction and maintenance of housing and roads will have an important effect on demand for aggregates.

B3. The LAA applies the above information as part of the demand scenarios for different aggregate types, whilst specific data related to actual and planned development (for housing and highways) forms the "other relevant local information" that is applied as an uplift against the 10-year averages.

B4. The high growth scenarios of the LAA are applied to 100% of the 10-year averages, meaning that the assumption is that all the aggregate sold is used in both housing and highways, therefore uplifts for both housing and highways applied. For example, for Marine Dredged Aggregate (Table 7), Demand Forecast Scenario 3 assumes that all of the sand and gravel sold could be used in housing (increasing the 10 year average by 28.3%), but then also assumes that all of the aggregate could be used in road maintenance and improvements (increasing the 10 year average by 17.9%), forming a total uplift of 46.2% against the 10 year average, that is considered unlikely to occur.

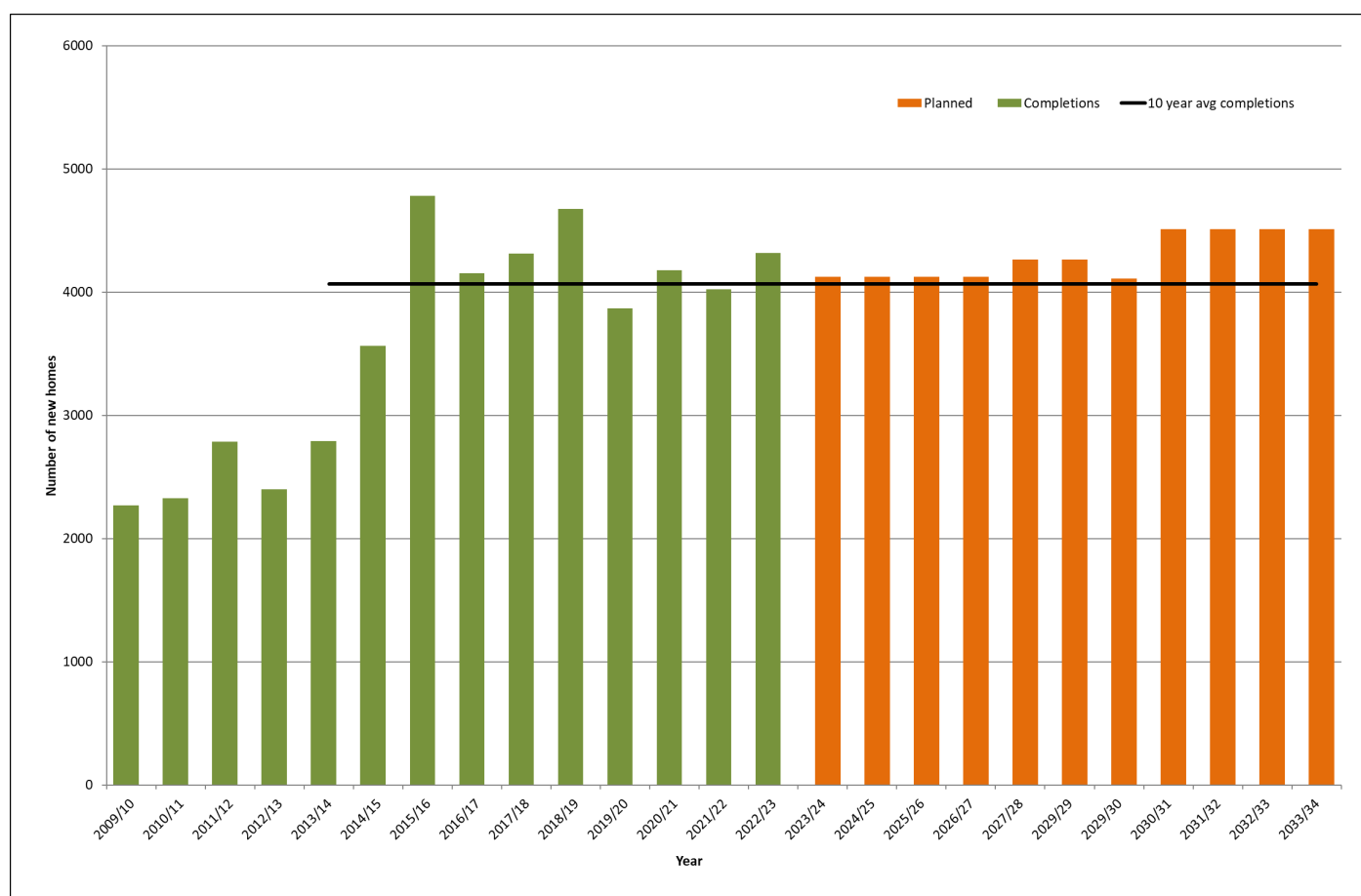
### **Housing**

B5. Housing completion data indicates that an average of 4,067 dwellings have been built annually in West Sussex over the 10-year period of 2013/14-2022/23. Meanwhile, planned housing, based on an analysis of existing or emerging local plans of local planning authorities within West Sussex, suggests that 4,290 dwellings will be built per annum on average up until 2034. This represents an increase of 5.48% when compared to the 10-year average.

B6. As aggregates are transported across administrative boundaries, future housing development in neighbouring areas may also influence the demand for aggregate and so needs to be considered. Figure B1 below therefore sets out planned housing in West Sussex as well as all neighbouring areas, and shows the percentage change when compared to actual housing completions.

B7. If the number of housing completions are to increase then it might be reasonable to assume that the demand for aggregates needed to build this housing will also increase. Figure B1 shows that a 1.86% increase in housing completions will occur in West Sussex, and for other neighbouring authorities, this number may be as high as 118.18%, which has been factored into the demand scenarios. During the previous five years, the West Sussex figure

has been applied, however the average of the neighbouring authorities is considered suitable as West Sussex requirements have fallen. This is because it is known that West Sussex is a net-exporter of aggregates, therefore applying the higher figure is prudent, and has been., set out within this LAA, against the 10-year average of sales of for aggregates (where relevant).



**Figure B1: Planned and completed housing in West Sussex (2012/13-2033/34)**

**Table B1: Planned housing growth in West Sussex and Neighbouring Areas**

Area	Average Completions Per Annum (2013/14-2022/23)	Average Planned Housing Per Annum (2022-2033) <sup>23</sup>	Percentage Change
Brighton & Hove	391 <sup>24</sup>	852	118.18%
East Sussex	1,602 <sup>25</sup>	2,069	29.17%
Hampshire	6,227 <sup>26</sup>	8,413	34.02%
Surrey	3,128 <sup>27</sup>	4,357	39.27%
West Sussex	4,068	4,144	1.86%
Average for West Sussex, East Sussex, Brighton & Hove, Surrey and Hampshire	15,466	19,835	28.25%

## Planned Highway Improvement (Crushed Rock)

B8. Evidence has been gathered on planned highway improvement and maintenance works, which require aggregate (generally crushed rock) use. Trunk roads are managed by Highways England, and non-trunk roads are managed by the Highways Authority (WSCC).

### Non-Trunk Roads

B9. An indication of the level of non-trunk road construction and maintenance for the previous 10 years in West Sussex is provided by an analysis of the highways & transport revenue & capital expenditure. This shows an annual average spend of £56.8M during the period 2015/16-2024/25 (see Figure B2).

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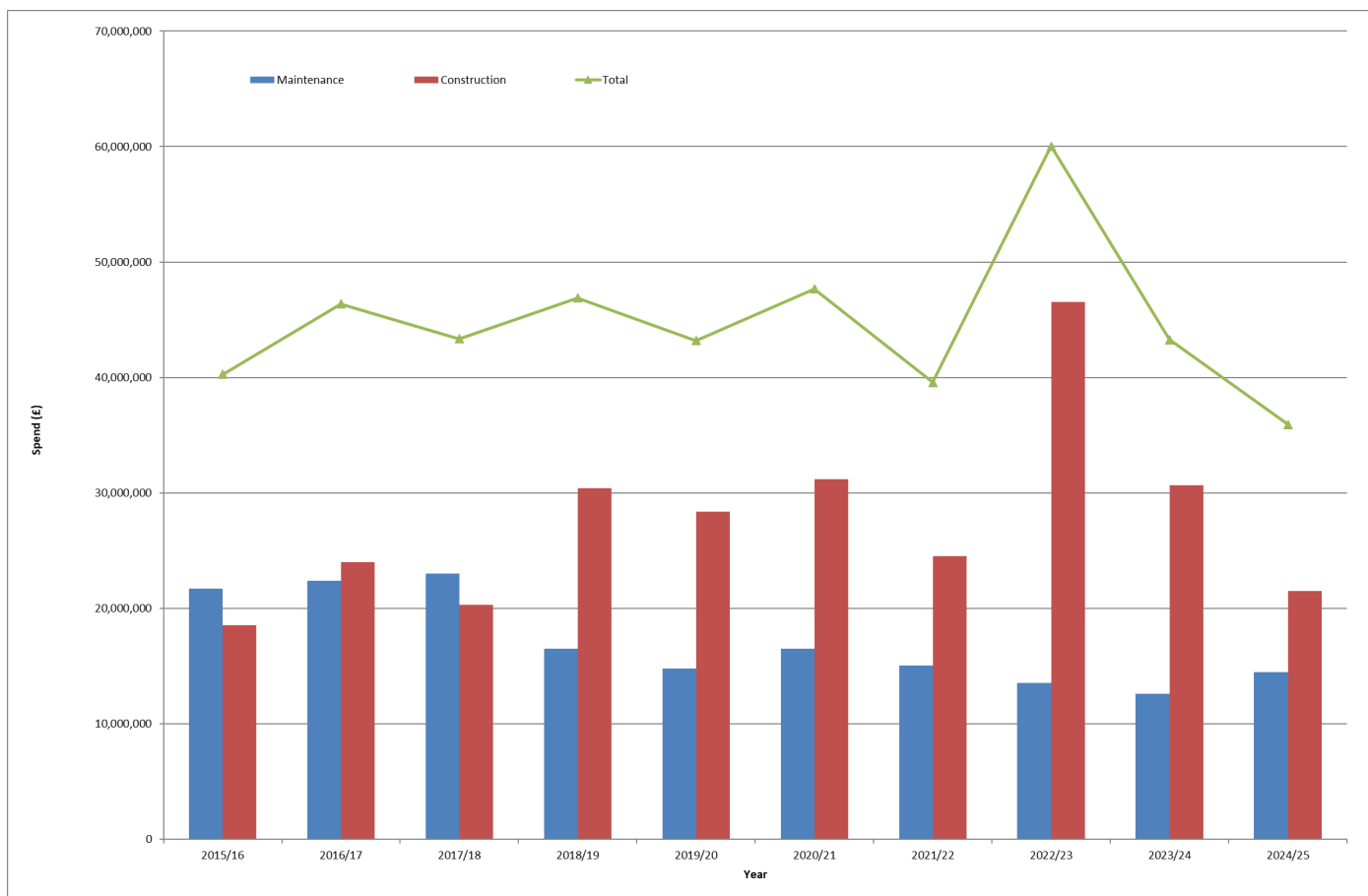
<sup>23</sup> Planned housing data is based on various D&B Local Plans, with data rolled forward to match JMLP plan period to give estimates of average planned housing per annum.

<sup>24</sup> Brighton and Hove City Council, Authority Monitoring Report (2022-23) covering the 10-year period 2013/14-2022/23.

<sup>25</sup> East Sussex County Council, East Sussex Figures website, and MCLG Housing Live Tables accessed August 2024.

<sup>26</sup> Hampshire County Council, Land Availability Monitoring System, and MCLG Housing Live Tables accessed August 2024.

<sup>27</sup> Surrey County Council, Surrey-I website, and MCLG Housing Live Tables accessed August 2024.



**Figure B2: West Sussex highways and transport capital and revenue expenditure (2015/16-2024/25)**

B10. There is limited information available on anticipated long term highways spending, with the only information readily available relating to grants from the Local Growth Fund for the period 2015-2021. This relates to those schemes which are named and committed, as set out in the Coast to Capital Growth Deal. West Sussex local transport funding is set out below in Table B2.

**Table B2: West Sussex Local Transport Funding**

Year	Funding Source: Construction (£m) <sup>28</sup>	Funding Source: Maintenance (£m) <sup>29</sup>	Funding Source: Local Growth Funding (£m) <sup>30</sup>	Total (£m)
2011/12	4,292	10,519	n/a	14,811
2012/13	4,578	10,447	n/a	15,025
2013/14	4,578	10,610	n/a	15,188
2014/15	6,348	10,043	n/a	16,481
2015/16	3,734	13,723	1,524	18,981

<sup>28</sup> DfT – Integrated Transport Block Capital Grant (March 2014). Indicative figures for the period 2015/16-2021/22.

<sup>29</sup> DfT – Highway maintenance funding allocations: 2015/16-2021/22 (December 2014).

<sup>30</sup> Named and committed schemes, as set out in the Coast to Capital Growth Deal, taking account of updated information on the schemes on total spending planned.

Year	Funding Source: Construction (£m) <sup>28</sup>	Funding Source: Maintenance (£m) <sup>29</sup>	Funding Source: Local Growth Funding (£m) <sup>30</sup>	Total (£m)
2016/17	3,734	12,581	606	16,921
2017/18	3,743	12,200	2,172	18,106
2018/19	3,734	11,043	15,065	29,842
2019/20	3,734	8,773	13,940	26,447
2020/21	3,734	11,043	17,500	32,277
2021/22 <sup>31</sup>	3,734	14,787	16,571	35,092
2022/23	n/a	20,899 Total for construction and maintenance	3,816	24,715
2023/24	n/a	14,777 Total for construction and maintenance	12,961	27,738
2024/25	n/a	16,938 Total for construction and maintenance	9,485	26,423

B11. Evidence from the Local Growth Funding, which is expected in West Sussex, suggests an average increase of £10.1M per annum<sup>32</sup>. Between 2011/12 and 2020/21, the average local transport spending per annum was £19.0M, whilst the average spending between 2021/22 and 2025/26 is expected to be £29.2M per annum. This is a total increase of £10.1M during the period 2021/22-2025/26 when compared to 2011/12-2021/22. **This equates to an increase of 17.88%<sup>33</sup> when compared to previous spending levels.**

B12. Due to the fact that East Sussex and Brighton & Hove rely on crushed rock landed at wharves at Shoreham to meet demands for aggregates in highways works, an assessment of spending was considered for those areas also (Table B3).

**Table B3: East Sussex and Brighton & Hove Local Transport Funding.**

Year	Funding Source: Construction (£m) <sup>34</sup>	Funding Source: Maintenance (£m) <sup>35</sup>	Funding Source: Local Growth Funding (£m) <sup>36</sup>	Total (£m)
2011/12	12,664	6,324	n/a	18,988
2012/13	12,233	6,971	n/a	19,204
2013/14	11,318	6,744	n/a	18,062

<sup>31</sup> The data used for construction and maintenance have been rolled forward, and are therefore a best guess.

<sup>32</sup> The average between 2015/16 and 2022/23 from Growth Funding.

<sup>33</sup> £8.8M equates to 29.55% of the 10-year average spending on highways construction and maintenance.

<sup>34</sup> DfT – Integrated Transport Block Capital Grant (March 2014). Indicative figures for the period 2018/19-2020/21.

<sup>35</sup> DfT – Highway maintenance funding allocations: 2015/16-2020/21 (December 2014).

<sup>36</sup> Named and committed schemes, as set out in the Coast to Capital Growth Deal (July 2014)

Year	Funding Source: Construction (£m) <sup>34</sup>	Funding Source: Maintenance (£m) <sup>35</sup>	Funding Source: Local Growth Funding (£m) <sup>36</sup>	Total (£m)
2014/15	12,221	8,034	n/a	20,255
2015/16	5,978	12,254	13,500	32,732
2016/17	5,978	12,150	19,000	37,128
2017/18	5,978	11,783	20,000	37,761
2018/19	5,978	10,665	8,000	24,643
2019/20	5,978	10,665	8,000	24,643
2020/21	5,978	10,665	8,000	24,643

B13. The local growth funding for East Sussex and Brighton & Hove is estimated to be on average £12.75M per annum during the period 2015-2021. When compared to previous spending, it is calculated that the increase in Local Growth Funding equates to **51.7%** during at least the first five years of the Joint Minerals Local Plan's Plan period, when compared to the 10-year average spend (£21.5M).

B14. For the purposes of establishing possible future aggregate demand scenarios that may result from an increase in highways maintenance and construction, a growth factor has been applied to crushed rock sales as crushed rock is the type of aggregate used in this activity. In 2009, 199,000 tonnes of crushed rock was sold in East Sussex and Brighton & Hove of which, 1%, was imported from West Sussex. Although imports of crushed rock at East Sussex have begun at Newhaven Depot, importation of crushed rock from West Sussex is expected to continue, although there were no obtainable records from the 2014 National survey. To take account of the exports of crushed rock to East Sussex, the proportion of crushed rock coming from West Sussex (1%) has been forecast to grow by 51.7% (i.e., to 1.52%) (see marine landed crushed rock demand scenarios 4 and 5, Table 11).

## Trunk Roads

B15. The average annual spend on the improvement and maintenance of trunk roads in West Sussex is difficult to ascertain due to the short term and commercial nature of the contracts between Highways England and the Area contractors. Highways England has confirmed that there will be a requirement for surfacing materials, and hence aggregates, over the lifetime of the new contract. The amount of aggregate required for trunk road improvement schemes will be dependent on future Government budget allocations, which have not yet been announced. The following trunk road improvement schemes are proposed in West Sussex:

- A27 Chichester improvement;
- A27 Worthing to Lancing improvements;
- A27 Arundel bypass.

B16. As these kinds of improvement works have been undertaken in the past and are therefore reflected in data on past demand, it is considered reasonable to assume that aggregate demand for trunk road maintenance and improvements in future will not increase future demand.

## Future Demand for Aggregates Use in Roads

B17. A number of major transport schemes are identified within the West Sussex County Council Transport Plan (2022-2036) which have been taken into account with regards to future demands for aggregates. These include:

- Short term (2022-27) road priorities



- A27 Chichester improvements (development-led)
- A27 Worthing & Lancing improvements (in the Government's Roads Investment Strategy 2020-25)
- A29 Realignment (development-led) (phase 1 construction due to commence in 2022)
- A259 Littlehampton corridor enhancement (under construction)
- A259 Bognor Regis to Littlehampton corridor enhancement package
- A259 Chichester to Bognor Regis corridor enhancement package
- A284 Lyminster bypass (development-led) (construction due to commence in 2022)
- A2011 Crawley junction improvements 54
- A2300 corridor enhancement (under construction)
- A27 Chichester major scheme (not currently programmed)
- A22 East Grinstead junction improvements
- A23 Crawley to Burgess Hill junction improvements
- A24 corridor enhancement package
- A264 corridor enhancement package
- Crawley Western Link Road (development-led)

B18. For the purposes of forecasting future demand for aggregates use in roads, the assumption being made is that, if spending on the construction and maintenance of roads is to increase by 25% (in West Sussex), the demand for aggregates will also increase by 25%. This factor has therefore been used in the demand scenarios, set out within this LAA, against the 10-year average of sales of Crushed Rock. A further two demand scenarios for marine landed crushed rock have been prepared to account for demand from East Sussex and Brighton & Hove.



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