

## **SOUTH WALES REGIONAL AGGREGATES WORKING PARTY**

**Minutes of meeting – 10am on Monday 5<sup>th</sup> September 2016, at The Innovation Centre,  
Bridgend**

### **Present:**

Martin Hooker – Consultant (Chair)  
Hugh Towns – Carmarthenshire CC (Secretary)  
Jonathan Parsons – Bridgend CBC  
Ruth Amundson – Caerphilly CBC  
Tom Boothroyd – Carmarthenshire CC  
Ffion Morgan – Carmarthenshire CC  
Graham Dorrington – Ceredigion CC  
Mark North – MPA  
Mark Frampton – MPA  
Peter Jordan - NRW  
Carl Comerford – Neath Port Talbot CBC  
Gary Nancarrow – North Wales RAWP Secretary  
Nick Everington – The Crown Estate  
Adrian Wilcock – Torfaen County Borough Council  
John Raine – Vale of Glamorgan C  
Kate Davis – Vale of Glamorgan C

### **1. Apologies:**

Lynda Healy – Blaenau Gwent CBC  
Murray Alston - BAA  
Stuart Williams – Cardiff CC  
John Cuddy – Cuddy Demolition and Dismantling  
Justin Waite - Merthyr Tydfil CBC  
Nick Horsley - MPA  
Martin Davies – Monmouthshire CC  
Lindsay Christian –Newport CC  
Owen Jones – Rhondda Cynon Taff CBC  
Bob Smith – Pembrokeshire CC  
Joanne Smith – WG  
Steve Bool – WG

### **2. Minutes of the SWRAWP Meeting 21<sup>st</sup> March 2016**

The minutes were accepted as a correct record.

### **3. Matters Arising**

Section 4 – Carmarthenshire County Council's Grant Bid to provide the Technical Secretary for the SWRAWP was successful. The grant period runs until the end of March 2017.

Section 6 – The Sub-Committee to consider the timeline for the next revision has been set up and is due to meet on 23<sup>rd</sup> September 2016.

### **4. South Wales RAWP Update**

The AS2014 Report has still not been published due to the MPA position that it should not be published until the Inspector makes his report on the Vale of Glamorgan LDP available. The Report is likely to be available in March 2017 so the AS2014 and consequently the AS2015 Annual Reports will not be published until March 2017 at the earliest.

The Annual Survey forms for 2015 have been issued. The response has been reasonable but forms from one of the major operators are outstanding. In the absence of these returns it is difficult to establish a trend but it would appear that the recovery in aggregate sales has slowed during 2015.

### **5. North Wales RAWP Update**

The North Wales Annual Report for 2014 is due to be published imminently. There has been a delay due to issues with some of the data and with confidentiality due to a smaller number of operators. There was an increase in aggregate sales from 4.7 million tonnes in 2013 to 5.5 million tonnes in 2014. Crushed Rock sales were up 500kt but Igneous/Metamorphic sales were down slightly as the resources tend to be in the North West, further from the markets. Slate sales were steady at approximately 400kt.

The response to the 2015 Survey has been reasonable with only a few independents still to report.

The Second Mersey Crossing is a major project in North Wales and will require substantial amounts of aggregate.

### **6. Environment Act Update**

The Environment Act (Wales) received Royal Assent on 21<sup>st</sup> March 2016.

The Act requires NRW to publish a State of Natural Resources Report, the first version of which is due to be published at the end of September 2016. This will form the essential evidence base for the National Natural Resources Policy which is scheduled to be produced by WG in 2017.

NRW will then be tasked, in collaboration with others, to prepare and publish Area Statements, which will facilitate the implementation of the National Natural Resource Policy. These Area

Statements are due to be published in 2019 and will be an important evidence base for bodies operating within an area as they will include information on the natural resources and the priorities, risks and opportunities for sustainably manage natural resources. There is a stakeholder workshop being organised by NRW in North Wales from 12<sup>th</sup>-15<sup>th</sup> September 2016 which will consider how to develop a framework for area statements. MPA and POSW representatives have been invited and there will be the opportunity to discuss how minerals should feature.

The Act also introduces an enhanced biodiversity and resilience of ecosystems duty. This duty replaces the duty for public authorities to have regard to biodiversity in the NERC Act 2006 with a duty to maintain and enhance biodiversity. Public Authorities should prepare and publish their first plan setting out what they propose to do to comply with the duty, within the first year of the Act coming into force. Their first report on complying with the duty must be published by 2019 and then every three years after this date.

Link: <http://gov.wales/topics/environmentcountryside/consmanagement/natural-resources-management/environment-act/?lang=en>

## **7. WG Update**

There was no-one present to provide a WG update.

The MPA advised that they had set up 6 monthly meetings with WG officials.

## **8. MPA/BAA Report**

MPA figures have shown that construction demand improved in Q2 compared to Q1 2016.

A new application is underway in the Bristol Channel (Culver) to secure a long term supply of marine sand for the South West. This was awarded to Hanson, CEMEX and Tarmac under The Crown Estate's last tender round. The application will replace the current Culver licence, which supplies a significant proportion of the marine sand to South Wales and the South West, and essentially replaced the old Nash Bank licence. The new application straddles the median line and will have to progress through both English and Welsh regulatory systems.

Welsh National Marine Plan remains under development. BMAPA is in dialogue with WG to ensure that suitable marine mineral safeguarding provisions are included which mirror (as far as possible) the principles already established in the English marine planning process.

The English marine planning processes for the South West and North West have now commenced, and BMAPA has responded to the evidence and issues consultation. The intention is for both to be completed by early 2021. Clearly there are opportunities here for the English and Welsh planning processes to link between one another; continuity of process and principles

is key for marine development sectors that operate across and between marine plan areas (such as marine aggregates).

In respect of the Hendry Inquiry into tidal lagoon energy, the MPA met with inquiry officials and submitted evidence around the importance and mineral supply to support major infrastructure projects. Key point made was that while there is resource potential to support such projects (including the development and regeneration that would follow – such as with Cardiff Bay), unless there is certainty around what volume of material is needed and when, it is nigh on impossible for the mineral planning system to account for this potential demand. Also potential issues arising from the cumulative effect of multiple infrastructure projects ‘competing’ for the same resources.

### **9. Marine Dredging Update**

The Review of IMADP is ongoing and consultation has been undertaken in relation to a Welsh Marine Plan.

In 2015, 1.13 million tonnes of aggregate was dredged from the Bristol Channel; 650kt of which was landed in South Wales. Of the 1.4 million tonnes of marine sand and gravel landed in SW & NW England and Wales as a whole, approximately 60% is dredged from English Waters.

The 2016 Tender Round is ongoing. The Expressions of Interest window is now closed and bids have to be submitted by 31<sup>st</sup> October 2016. Decisions on the bids will be made in early 2017.

The Crown Estate has developed a new format agreement with industry. The offer is there for the industry to migrate to the new format agreement which is for a term of 15 years with an option for a further 15 years.

The Crown Estate has also submitted evidence to the Hendry Review.

### **10. Secondary Aggregates**

There was no-one present to give an update on secondary aggregates.

The use of secondary aggregate in South Wales seems to be reducing slightly. Aberthaw is the main source and its future looks uncertain. Port Talbot Steelworks is the only other major source and its future is also uncertain.

### **11. LDP Update**

Bridgend – don’t expect to review before 2017 but are unsure what impact potential Strategic Development Plans will have on the timeframe. The LPA do not have the resources to do abortive work on an LDP if there is an SDP. SPG is currently being developed.

Torfaen – will have to commence work this year, primarily due to housing land supply but also due to the impact of the Welsh Language Standards.

Neath Port Talbot – adopted Plan in January 2016, 5 SPG's are currently at the consultation stage.

Ceredigion – looking to review in 2017 but there is uncertainty around this.

Caerphilly – Members resolved to seek to withdraw the Draft Replacement LDP in July 2016 due to concerns about housing numbers and infrastructure capacity. They also resolved to seek to work with neighbouring LPA's to seek a more strategic approach.

Carmarthenshire – plan adopted December 2014. Will need to commence work on review in 2017

Vale of Glamorgan – The Examination is ongoing. All Action Point Responses have been submitted and are to be consulted upon. Matters Arising Changes will be out to consultation from 16<sup>th</sup> September 2016. Further hearing sessions on housing and gypsy/travellers are anticipated in January 2017 with adoption in May 2017.

There was some discussion about the issue of local government re-organisation. The MPA suggested that the areas of small unitary authorities might be merged for the purposes of the RTS in order to avoid a very low or nil apportionment where there has been little or no aggregates extraction within a local authority area during the 3 or 10 year reference period, with the conjoined authorities working collaboratively to deliver any provision arising for aggregates within the combined area. This will be considered by the RTS Sub Group.

## **12. Major Projects Update**

A decision on the Strike Price for the Swansea Bay Tidal Lagoon is expected to be linked to the outcome of the Hendry Review. The Hendry Review is due to report in Autumn 2016. The Marine Licence application is back out to public consultation. There are issues relating to de-commissioning. There is also no lease in place from The Crown Estate.

The Inquiry into the proposed M4 Relief Road at Newport opens in November. The target start date is still January 2018.

The City Region Project will require large quantities of aggregate for the infrastructure improvements.

The major windfarm projects in South Wales are consuming large quantities of primary aggregate especially for track construction.

A decision to build Hinkley Point Nuclear Power Station may well have an impact on aggregate demand from South Wales.

### **13. Any Other Business**

There was some discussion around the issue of safeguarding of minerals. This is an issue that will need to be picked up during the RTS Review.

Mark Frampton on behalf of the MPA expressed his thanks to the Chair for his 20 years of unstinting service to the SWRAWP. The MPA considered that under his stewardship they had always had a fair hearing and he wished him well for the future.

The Secretary also expressed his thanks to the Chair who had been a steady hand over many years and would be a very difficult act to follow. This was echoed by all present.

### **14. Date of next meeting – 10am on Monday 13<sup>th</sup> March 2017 at the Innovation Centre, Bridgend**

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