

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

**Minutes of meeting – 10am on Monday 8<sup>th</sup> October 2018, at The Innovation Centre, Bridgend**

### **Present:**

Llinos Quelch – Carmarthenshire CC (Chair)  
Hugh Towns – Carmarthenshire CC (Secretary)  
Justin Waite – Blaenau Gwent CBC  
Richard Matthams – Bridgend CBC  
Ruth Amundson – Caerphilly CBC  
Tom Boothroyd – Carmarthenshire CC  
Ffion Morgan – Carmarthenshire CC  
Ruth Henderson – CC Swansea  
John Raine – Merthyr Tydfil CBC  
Mike McGee - MPA  
Sarah Jones – Monmouthshire CC  
Carl Comerford – Neath Port Talbot CBC  
Lindsay Christian – Newport CC  
Gary Nancarrow – North Wales RAWP Secretary  
Gayle Lister – Pembrokeshire Coast NPA  
Bob Smith – Pembrokeshire CC  
Clare Hewitt – Rhondda Cynon Taff CBC  
Adrian Wilcock – Torfaen CBC  
Nathan Slater – Vale of Glamorgan C  
Joanne Smith – WG  
Gareth Dudley-Jones - WG

### **1. Apologies:**

Graham Dorrington – Ceredigion CC  
Nick Horsley – MPA  
Malcolm Lawer - MPA  
Mark Frampton – MPA  
Gemma Beynon - NRW  
Peter Morris – Powys CC

### **2. Minutes of the SWRAWP Meeting 19<sup>th</sup> March 2018**

The minutes were accepted as a correct record.

### **3. Matters Arising**

Arising from Item 9, WG to provide an update on the position in relation to Aggregates Tax.

### **4. North Wales RAWP Update**

The AS2017 survey returns indicate that total aggregate sales in North Wales were just over 5mt which is significantly down from 5.7mt in 2016 and 5.9mt in 2015. Sales of limestone are down to 3.43mt (which is the lowest for many years), sales of igneous stone are down to 545,000 tonnes and S&G sales are down to 600,000 tonnes. Sales of slate are holding their own at 450,000 tonnes.

The reduction in sales in 2017 is difficult to explain but may be due in part to a number of mergers and acquisitions which is consolidating ownerships in the hands of fewer companies. The larger portfolios of sites across the UK means that operators are maximising productivity using as few producing units as possible which may result in some sites being mothballed.

### **5. South Wales RAWP Update**

The AS2016 Report was published in March 2018.

The response rate to the AS2017 survey has been very good for crushed rock and S&G, mixed for marine dredged S&G and non-existent for secondary aggregates.

Initial indications are that aggregate sales are down slightly at 9.4mt (some outstanding returns still awaited which may be different to estimates) from 9.5mt in 2016. Sales of crushed rock are 8.36mt which is slightly down on the 8.41mt in 2016; sales of land won S&G are the same at 160,000 tonnes and sales of marine dredged S&G are slightly down at 880,000 from 930,000 tonnes in 2016.

Sales of crushed rock have reduced in Powys and NPT where the supply is dominated by high psv stone. It would seem to indicate a reduced demand for high psv stone. This is somewhat unexpected given the current emphasis on road repair.

Sales of crushed rock are also down in Cardiff and the Vale but have increased in the adjacent valleys authorities.

The resilience of the land won S&G market is also noticeable given that there seems to generally be a move to using crushed rock fines in concrete in preference to sand. Demand had been expected to reduce but that doesn't seem to be the case.

### **6. RTS 2<sup>nd</sup> Review**

WG confirmed that Cuesta Consulting have been appointed to carry out the RTS 2<sup>nd</sup> Review. An Inception meeting has taken place and some minor amendments have been made to the

specification. The original tender timescale was quite tight but it looks like it will need to be extended up to December 2019 and possible later depending on the amount of work required to review the methodology. Alan Thompson (Cuesta) has met with the key stakeholders and will submit an Interim Report to WG in October/November 2018. A Steering Group Meeting will then be convened in November/December 2018 to discuss the Interim Report. A Draft RTS should be submitted to the RAWP's by March/April 2019 followed by a consultation exercise. LPA's should include the RTS Consultation in their Forward Work Programme for April 2019. Full details of the Programme of Work will be circulated when it is finalised.

## **7. WG Update**

The consultation on PPW10 generated 217 responses plus 2562 generic responses elicited by the Woodland Trust. These responses have been analysed and the document re-drafted where deemed appropriate. The Cabinet Secretary has to be taken through the changes and it is hoped that PPW10 will be published before the end of the year.

Consultation on the NDF preferred option generated 86 responses. It is intended to publish a draft NDF for consultation in July 2019, so it will need to be drafted by Easter 2019. Final publication is due in Autumn 2020.

The Law Commission is due to report by the end of the year. WG then have 6 months to respond if a quick response is possible or 12 months in any other case.

WG confirmed that it was their aim to consolidate all minerals guidance at some point.

## **8. NRW Update**

There was no-one present from NRW to provide an update.

Concern was expressed that NRW had not attended for two meetings when there were important items on the Agenda which related to their functions. The SWRAWP needs to understand how Area Statements are evolving and what they will contain and also needs to understand what impact the removal of the quarry dewatering exemption might have on crushed rock reserves, especially limestone reserves. WG to seek some feedback in relation to non-attendance by NRW.

## **9. MPA/BAA Report**

The MPA advised that the UK Minerals Strategy had been launched in July, available on the MPA website. It identifies a requirement for identifying and permitting at least 5 billion tonnes of aggregate over the next 25 years. The strategy has been supported by RTPI and RICS as well as BEIS.

The MPA AMP survey of planning applications in 2017 (not yet published) shows a concerning reduction in landbank replenishment rates. For S&G it's circa 53% and for crushed rock it's circa 69% which is a marked decline on previous years.

### **10. Marine Dredging Update**

There was no-one present to provide an update on the current position.

The Draft Welsh National Marine Plan was expected to be published shortly. It is not clear whether there have been any significant changes since the consultation draft.

### **11. Secondary Aggregates**

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

### **12. LDP Update**

Torfaen – started the LDP Review. Call for candidate sites has closed and generated less sites than the current LDP. Currently working on the SA.

Monmouthshire – 4<sup>th</sup> AMR being reported to Select Committee next week. DA for LDP Review endorsed in May 2018. Call for Candidate sites closes on 19<sup>th</sup> November. Scoping Report done in conjunction with Torfaen and Blaenau Gwent.

Swansea – MAC and IMAC schedule awaited. Consultation on MAC's planned for November/December. Inspectors Report due in January 2019 but it depends on the potential impact of PPW10.

PCNPA – hoping to submit the revised LDP to WG by Christmas subject to outcome of focussed changes.

Vale of Glamorgan – 1<sup>st</sup> AMR being progressed.

Caerphilly – the adopted plan runs to 2021. The first review was commenced but the replacement plan was withdrawn in 2016 due to lack of public support and concerns about regional issues. Had authority to recommence the review of the plan but are waiting for further clarity on the SDP before starting in earnest. Have been considering the background information and prepared a paper on Minerals looking at changes since 2010 that needed to be taken into account this time around. Similar papers have been prepared for other topics. The annual monitoring reports are continuing and the adopted plan is still performing well in terms of minerals.

Merthyr Tydfil – Deposit Plan out for consultation and closed on 10<sup>th</sup> September. Currently considering the 100 responses received. Hope to submit to WG in January 2019.

Blaenau Gwent – DA agreed and work has commenced on a replacement LDP. Current Plan runs to 2021.

Neath Port Talbot – Neath Port Talbot – 2<sup>nd</sup> AMR being produced. No concerns identified however it is anticipated that by 2019 there may need to be a full review of the LDP.

Bridgend – LDP expires 2021 so reviewing. Call for Candidate sites finishes on 9<sup>th</sup> November. Currently scoping the SA.

Newport – 3<sup>rd</sup> AMR just completed.

Pembrokeshire – Review commenced in May 2017. DA agreed in June. Call for Candidate sites has generated 450 responses. 5<sup>th</sup> AMR being produced.

RCT – Engaged on work for an SDP for the South East Wales Region. AMR being reported to Cabinet shortly.

Carmarthenshire - DA agreed. Call for Candidate sites has generated some 900 responses.

Powys – LDP adopted April 2018.

Ceredigion – DA agreed and review progressing.

### **13. Major Projects Update**

A 49.9 Mw biomass energy plant at Blackbridge, Milford Haven has been refused.

An application has been received by Blaenau Gwent to renew the planning permission for the Circuit of Wales.

### **14. Any Other Business**

SDP in SE Wales seems to have stalled for procedural reasons.

### **15. Date of next meeting – 10am on Monday 25<sup>th</sup> March 2019 at the Innovation Centre, Bridgend**