



# East Sussex, South Downs and Brighton & Hove Local Aggregate Assessment December 2020

**December 2020**



# Executive Summary

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### Executive Summary to accompany LAA 2020 Dashboard

The first East Sussex, South Downs and Brighton & Hove Local Aggregate Assessment (LAA) was published in December 2013. The LAA has been updated annually and is based on the Plan Area for the adopted East Sussex, South Downs and Brighton & Hove Waste & Minerals Local Plan (WMLP).

The Government is currently in the process of analysing returns from minerals operators as part of its extended AMS19 (usually) 4 yearly survey. The data for land-won sites and for wharf imports is therefore in most cases not yet available (as at end 2020). In addition, the Covid 19 pandemic has meant that some operators have either been unable or delayed in supplying data to mineral planning authorities (mpa) on recycled and secondary aggregate sales and on rail imports of aggregate material. In the absence of this data it has not therefore been possible for the majority of mpas to produce a full updated LAA. Instead the South East Aggregates Working Party (SEEAWP) asked each mpa to submit an "LAA dashboard" using available data and local intelligence. These dashboards will provide the basic information to enable an Annual report to be prepared for SEEAWP.

This document therefore represents a dashboard only for the eighth LAA (LAA 2020) for the mpas of East Sussex County Council, Brighton & Hove City Council and the South Downs National Park Authority (the Authorities). Where complete data is available for 2019 and where no confidential information would be revealed, this data has been incorporated into the Dashboard.

Overall, the picture of aggregate supply to the Plan area in the last few years remains, with a heavy dependence on imports by road, sea and rail. Significant levels of marine imports (marine dredged and crushed rock) are received through Shoreham Port and Newhaven and to a lesser extent Rye. Crushed rock, recycled aggregate and sand and gravel are imported by rail at Newhaven. Land-won sand and gravel is extracted in the east of the Plan area at Lydd with about 50% of material being consumed in East Sussex. Less than one years supply of permitted resource is understood to remain at this site. It is assumed that all soft sand supply is met by road imports as there are currently no active sites in the Plan Area. A steady supply of recycled material is produced from construction waste management facilities across the Plan area. A continuing and increasing demand for construction materials is anticipated.

The LAA 2020 dashboard does however reveal a large scale increase in imports of marine dredged aggregate at Newhaven Port between 2018 and 2019. This is attributed to the development and operation of the new aggregates import, processing and bagging plant at East Quay, Newhaven Port. Sales of crushed rock imported by rail to the Newhaven railhead have also increased since 2018, continuing a trend observed since the facility first operated in 2014.

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The Authorities are currently undertaking a Review of the WMLP which commenced in September 2017 with a consultation on the Call for Sites and Evidence. An extension to an existing sand and gravel quarry in the east of the Plan Area was received at this stage. The Authorities formerly considered the content of the next stage of the Plan Review earlier in 2020 and decided not to include the proposed extension site. A consultation on the Revised policy document was held between May and August 2020. The Authorities are currently considering the representations received and reviewing the next stages of the Review timetable.

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## Dashboard

Summary - East Sussex, South Downs and Brighton & Hove for LAA 2020 dashboard										
Quarry Sales	Year of data used	Sales (Mt) & Trend	Average (10-yr) Sales & Trend	Average (3-yr) Sales & Trend	LAA Rate (Mt)	Reserve (Mt)	Landbank (years)	Allocations (years)	Capacity (Mtpa)	Comments
Soft Sand	Situation has not altered since 2018	0	N/A	0	0	0.25	N/A	N/A	N/A	Extraction commenced in 2007 at Stanton's Farm/Novington sandpit but no extraction has taken place in recent years. As there are no other soft sand sites in the plan area it is assumed that demand for this material is being met by road imports.
Sharp Sand & Gravel	2019	0.291	N/A	0.309	0.15*	0.216	<1**	N/A	N/A	* Average of last 3 years divided by two, as 50% of material is destined for Kent. **Represents the lifetime of the entire site as all working now in East Sussex. See FOOTNOTE below.

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Aggregate Infrastructure Sales	Year of data used	Sales (Mt) & Trend	Average (10-yr) Sales & Trend	Average (3-yr) Sales & Trend	LAA Rate(Mt)	Reserve (Mt)	Landbank (years)	Allocations (years)	Capacity (Mtpa)	Comments
Recycled / Secondary Aggregates***	2018	0.515	N/A	0.378 	0.378	N/A		N/A	0.74 (2018)	*** Not all data was returned for 2019 and identifying some figures could reveal confidential data. However estimates indicate that data for 2019 is likely to very similar to that for 2018 hence figures in the dashboard have not been altered
Marine Sand & Gravel	2019	0.159	N/A	Data not available for last 3 years but imports have increased by a factor 15 since previous year	?	N/A	N/A		N/A	Data reported is for Newhaven Port only. Does not include marine sand and gravel imported at B&H Shoreham port wharves
Rock Imports by Sea	2018	0.048	N/A	0.047 	0.047	N/A	N/A	N/A	N/A	Figures either confidential or unavailable at present. Therefore using previous year 2018
Rail Depot Sales (Sand & Gravel)	2019	0.02	N/A	0.04 	0.04	N/A	N/A	N/A	0.25~	-Capacity is for whole of Newhaven railhead. Possibility that some material may have originally been imported by sea.
Rail Depot Sales (Crushed Rock)	2019	0.122	N/A	0.1 	0.1	N/A	N/A	N/A	0.25~	-Capacity is for whole of Newhaven railhead

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## FOOTNOTE: Sharp sand and gravel (originally from LAA 2019)

At their November 2019 meeting, SEEAWP's consideration of the draft LAA 2019 included discussion regarding the methodology of recording sales from Lydd Quarry and the effect of this on the estimation of the LAA Rate. Some SEEAWP members thought that the East Sussex approach distorted the supply situation. It is generally understood by SEEAWP that East Sussex is an unusual case in that quarry sales are low, which in turn is a function of limited resources, and it is heavily dependent on imports. Nevertheless, SEEAWP members think the LAA Rate, as a measure of demand, should be based on average aggregates sales irrespective of their destination. The implications of the LAA Rate are then addressed by the examining the supply options and concluding if any action is required.

However, the Authorities do not consider that the LAA rate requires amendment. SEEAWP accept this position but requested the addition of a footnote in the LAA to reflect the SEEAWP discussion (hence the inclusion of these paragraphs). The Authorities note SEEAWP's comments and concur that the Plan area has a long-standing unique and particular land - won aggregate situation which has been recognised as a "special case". There is only one active sharp sand and gravel site (Lydd Quarry) in the Plan Area where the operator's established arrangement is that 50% of material produced is exported to Kent. The Authorities consider therefore that the sharp sand and gravel LAA rate should be calculated by dividing average sales from this site by two, because of the export situation. This gives an LAA rate adjusted to reflect local circumstances which allows for provision to be planned, based on the consumption needs of the Plan Area. The Authorities will consider these matters further as part of the Plan Review process.

**Footnote Update** At the SEEAWP meeting November 2020 a similar debate about the LAA Rate for land won sand and gravel and the approach taken by the Authorities occurred. The footnote added to the 2019 LAA and reproduced for this dashboard was recognised. It was acknowledged the sales were correctly recorded, the issue was over the evidence for the chosen LAA Rate. It was noted the reserve in East Sussex was near exhaustion and the mineral plan, which is progressing, would address the issue of further land won extraction.

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