

**SOUTH WALES REGIONAL
AGGREGATES WORKING PARTY**

ANNUAL REPORT FOR 2016

Published March 2018

The statistics and statements contained in this report are based on information from a large number of sources and are compiled to an appropriate level of accuracy and verification.

Readers should use corroborative data before making major decisions based on this information.

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1. INTRODUCTION

1.1. This report has been prepared by the South Wales Regional Aggregate Working Party (SWRAWP) and **covers the calendar year 2016**. Each year, the SWRAWP co-ordinates the aggregate sales information received from all mineral operators via the eighteen local planning authorities which make up the South Wales region. Where annual survey returns have not been made, estimated data has been used. The work of the SWRAWP has been funded by Welsh Government (WG) since April 2002. The current grant funding runs until March 2018.

1.2. The collated information in this report makes a significant contribution to the ongoing study of supply and demand patterns, and provides a vital input into the monitoring and review of WG's supply and demand policy for aggregates enshrined in Planning Policy Wales and amplified in Minerals Technical Advice Note 1: Aggregates (MTAN1). It also assists in the monitoring of progress towards the achievement of the recommendations set out in the *Regional Technical Statement – First Review (RTS) – August 2014*. This information is also useful to Local Planning Authorities in carrying out their statutory functions in respect of the preparation of local development plans and the determination of planning applications. The information is also made available to the general public and industry, the latter using it to assist in planning new investment.

1.3. The Mineral Products Association (MPA) has issued revised advice to its members in relation to the confidentiality of data on aggregates supply which is supplied to Local Planning Authorities in response to the annual aggregate working party survey. All data is provided on a 'Commercial in Confidence' basis and can be used by Local Planning Authorities for purposes associated with their planning functions so long as it prevents data being ascribed to individual planning units, unless specific permission to use the data is given by the operator. The British Aggregates Association have always encouraged members to fully disclose relevant information.

2. SOUTH WALES REGIONAL AGGREGATES WORKING PARTY

2.1. The SWRAWP is one of eleven Aggregates Working Parties (AWPs) in England and Wales which provide information and advice to the Department for Communities and Local Government (DCLG) and to the Welsh Government in relation to the supply of, and the demand for, aggregate minerals.

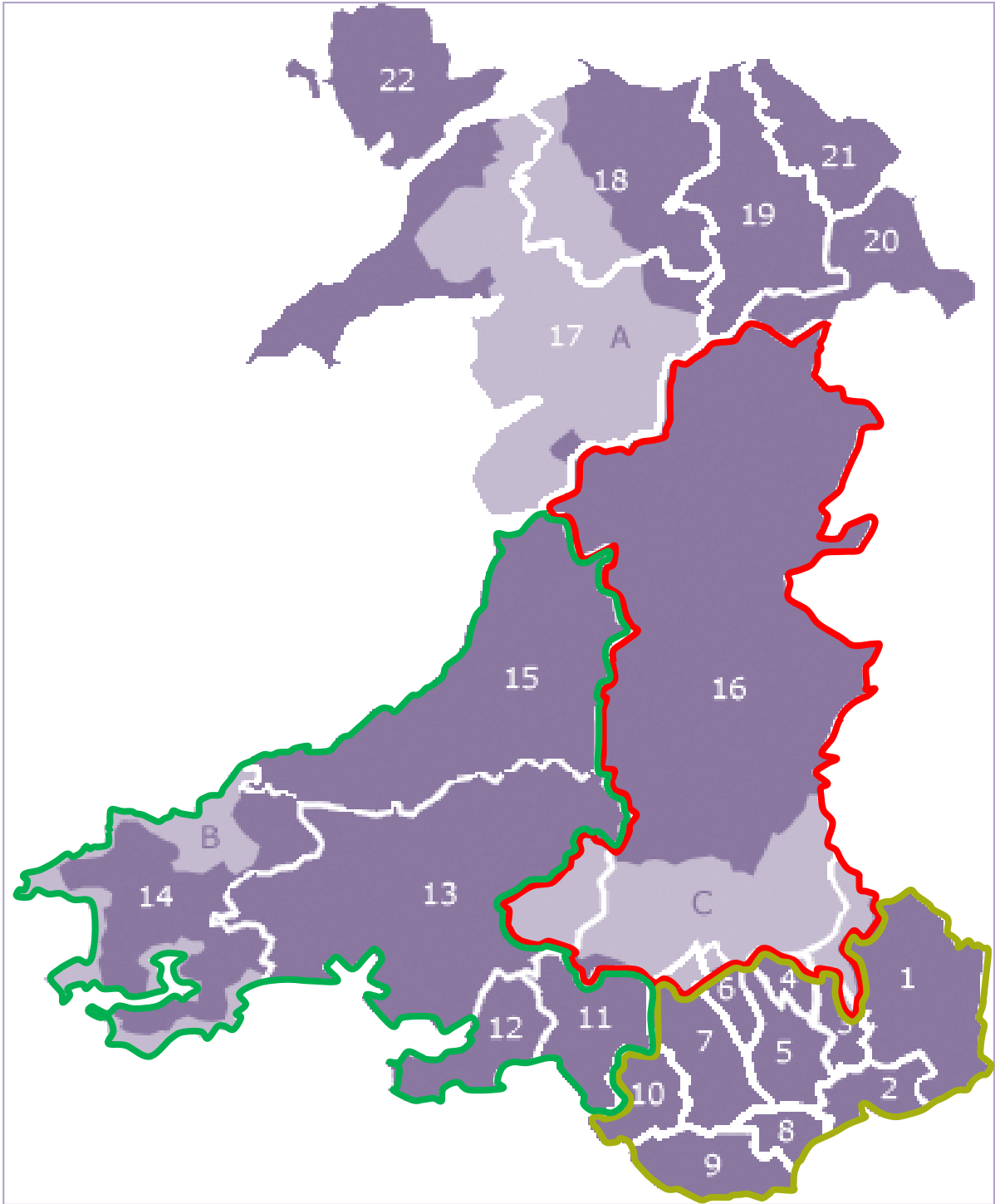
2.2. The SWRAWP is a technical working group with membership drawn from officers of the 18 Local Planning Authorities, representatives of the Mineral Products Association (MPA), the British Aggregates Association (BAA), representatives of the construction and demolition industry, Welsh Government, The Crown Estate and Natural Resources Wales. It is not a policy making body. A list of members at the date of publication is provided in Appendix A.

2.3. Two ordinary meetings of the SWRAWP were held in 2016 – March and September.

2.4. Meetings were held with the NWRAWP Secretary and Welsh Government officials to discuss RAWP contract work and the RTS review. Regular contact has been maintained with Local Planning Authority Officers to ensure robust and consistent data is used for the annual survey.

MAP 1

S.W.R.A.W.P. Mineral Planning Authorities



South East Wales	South West Wales
1. Monmouthshire	11. Neath-Port Talbot
2. Newport	12. Swansea
3. Torfaen	13. Carmarthenshire
4. Blaenau Gwent	14. Pembrokeshire
5. Caerphilly	15. Ceredigion
6. Merthyr Tydfil	B. Pembrokeshire Coast National Park
7. Rhondda Cynon Taf	
8. Cardiff	Powys/BBNPA
9. Vale of Glamorgan	16. Powys
10. Bridgend	C. Brecon Beacons National Park

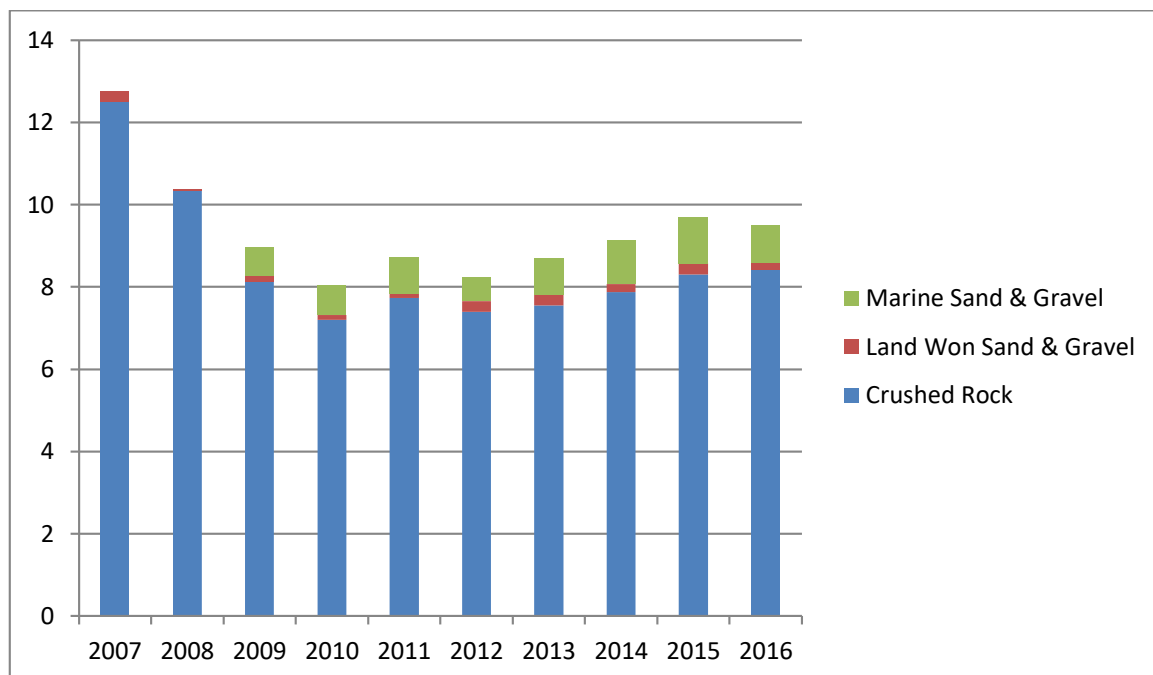
3. AGGREGATE SALES 2007-2016

*Data not available or confidential

Table 1
Primary Aggregate Sales 2007-2016 (million tonnes)

	Crushed Rock					Land Won Sand & Gravel					Marine Dredged Sand & Gravel					All Primary Aggregates	
Year	Powys (inc Brecon Beacons)	South West Wales	South East Wales	Total Sales	% of Total Sales	Powys (inc Brecon Beacons)	South West Wales	South East Wales	Total Sales	% of Total Sales	Powys (inc Brecon Beacons)	South West Wales	South East Wales	Total Sales	% of Total Sales	Sales	% change from previous year
2007	3.20	3.27	6.04	12.51	*	*	*	*	0.24	*	0	*	*	*	*	*	*
2008	2.90	2.85	4.60	10.35	*	*	*	*	0.03	*	0	*	*	*	*	*	*
2009	2.58	2.47	3.08	8.13	90.83	*	*	*	0.14	1.56	0	*	*	0.68	7.60	8.95	*
2010	2.71	1.89	2.65	7.20	89.66	*	*	*	0.12	1.49	0	*	*	0.71	8.84	8.03	-10%
2011	2.89	1.99	2.85	7.73	88.54	*	*	*	0.11	1.26	0	*	*	0.89	10.19	8.73	+9%
2012	2.73	1.74	2.92	7.39	89.90	0	0.27	0	0.27	3.28	0	*	*	0.56	6.81	8.22	-6%
2013	2.88	1.84	2.83	7.55	86.78	0	0.28	0	0.28	3.21	0	0.26	0.61	0.87	10.00	8.70	+6%
2014	3.22	1.84	2.81	7.87	86.3	0	0.20	0	0.20	2.19	0	0.25	0.80	1.05	11.51	9.12	+5%
2015	3.28	1.81	3.22	8.31	85.58	0	0.27	0	0.27	2.78	0	0.26	0.87	1.13	11.64	9.71	+6%
2016	3.07	1.69	3.65	8.41	88.52	0	0.16	0	0.16	1.68	0	0.25	0.68	0.93	9.80	9.50	-2%

FIGURE 1 – Primary Aggregate Sales 2007-2016 (million tonnes)



3.1 Table 1 shows the total primary aggregate sales from the region over the 10 year period 2007-2016, subdivided between South West Wales, South East Wales and Powys/BBNPA. These sub-regions correspond to the areas for which data has been available over the last 10 years allowing data to be compared and at the same time respecting confidentiality.

3.2 South West Wales is made up of the following Mineral Planning Authorities – Carmarthenshire, Ceredigion, Pembrokeshire, Pembrokeshire Coast National Park, Neath Port Talbot and Swansea.

3.3 South East Wales is made up of Blaenau Gwent, Merthyr Tydfil, Monmouthshire, Newport, Torfaen, Bridgend, Caerphilly, Cardiff, Rhondda Cynon Taf and the Vale of Glamorgan.

3.4 The sales of primary aggregate fell in 2016 to 9.5 million tonnes compared to 9.71 million tonnes in 2015. Crushed rock sales rose to 8.41 million tonnes in 2016 compared to 8.31 million tonnes in 2015, with a significant increase in sales in South East Wales of 430,000 tonnes. Sales of crushed rock in South West Wales were down 120,000 tonnes compared to 2015 and sales in Powys were down 210,000 tonnes compared to 2015.

3.5 Marine sand and gravel sales reduced for the first time since 2012 to 0.93 million tonnes in 2016 compared to 1.13 million tonnes in 2015. The decrease was accounted for in South East Wales in the main where there was a reduction in sales from 870,000 tonnes to 680,000 tonnes. There was a very slight decrease in marine sand sales in South West Wales but marine sales in this region have been very stable over the last five years.

3.6 Land-won sand and gravel sales in 2016 showed a significant reduction to 160,000 tonnes from 270,000 tonnes in 2015. Land won sand and gravel sales come exclusively from sites in South West Wales. The difference appears to be a change at one site where a significant proportion of its output was used for Non Aggregate uses in 2016.

3.7 Figure 1 shows that the steep decline in aggregate sales during the economic recession from 2008 onwards has certainly stabilised. There was a clear upward trend in total aggregate sales since 2012 but there appears to be a tailing off in 2016 due to the reduction in sales of sand and gravel.

3.8 Crushed rock continues to account for 88.52% of primary aggregate sales with marine landings contributing 9.8% and land won sand and gravel approximately 1.68%. South East Wales has the highest crushed rock sales at 3.65 million tonnes (43%), with Powys (including Brecon Beacons) at 3.07 million tonnes (37%) and South West Wales 1.69 million tonnes (20%). Marine sand and gravel sales are highest in South East Wales at 680,000 tonnes (73%) with South West Wales accounting for 250,000 tonnes (27%).

Table 2
Crushed Rock Sales by Rock type and End Use in 2016 (million tonnes)

	Coated Roadstone	Uncoated Roadstone	Concrete Aggregate	Fill/Other Construction Uses	Rail Ballast	TOTAL AGGREGATE	Building Stone	Total Non-Aggregate
Limestone	0.26	0.58	0.98	2.60	0	4.42	0.02	0.75
Sandstone	1.37	0.36	0.24	0.75	0	2.72	0.04	0.05
Igneous	0.28	0.10	0.01	0.88	0	1.27	0.01	0.01
TOTAL	1.91	1.04	1.23	4.23	0	8.41	0.07	0.81

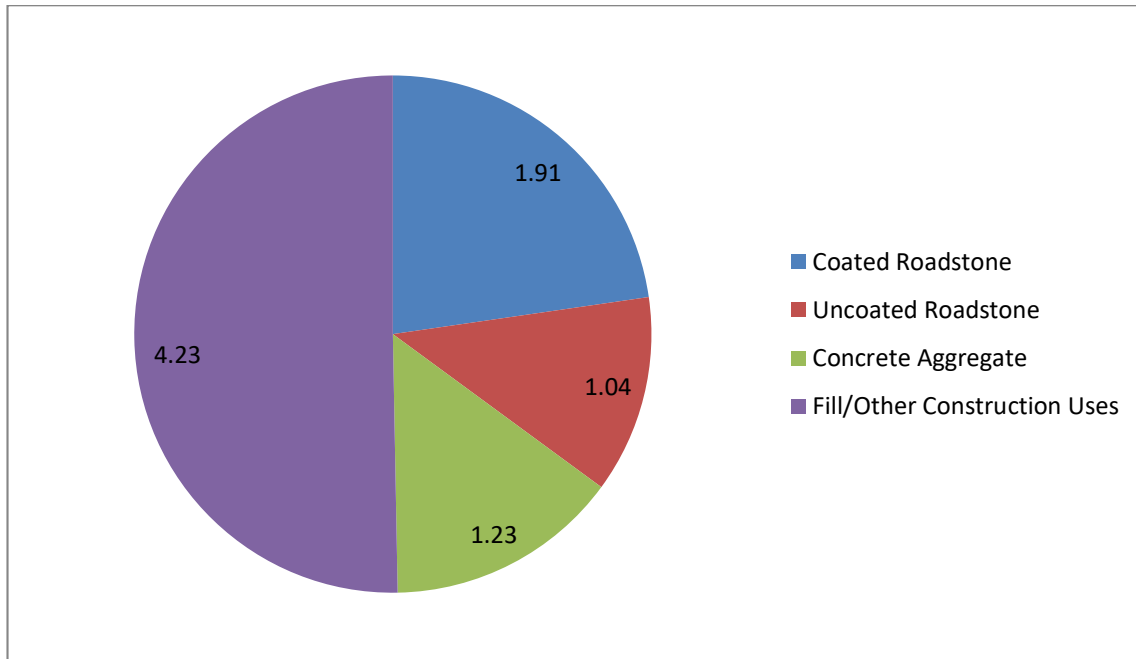
NB - Figures contain estimates where no survey return was provided

Table 3
Crushed Rock Sales by Rock type and End Use in 2015 (million tonnes)

	Coated Roadstone	Uncoated Roadstone	Concrete Aggregate	Fill/Other Construction Uses	Rail Ballast	TOTAL AGGREGATE	Building Stone	Total Non-Aggregate
Limestone	0.29	0.46	1.11	2.27	0	4.13	0.02	0.82
Sandstone	1.50	0.28	0.19	0.76	0	2.73	0.04	0.05
Igneous	0.37	0.14	0.02	0.92	0	1.45	0.03	0.03
TOTAL	2.16	0.88	1.32	3.95	0	8.31	0.09	0.90

NB - Figures contain estimates where no survey return was provided

FIGURE 2 – Crushed Rock Sales by End Use 2016



4.1 Sale of primary aggregate for roadstone decreased by 90,000 tonnes in 2016 compared to 2015, whereas roadstone sales had increased by 150,000 tonnes per year in 2015 and 2014. There has been a significant reduction of 250,000 tonnes in sales of crushed rock for coated roadstone produced on site but an increase of 160,000 tonnes in the sale of uncoated roadstone. The amount of limestone used for roadstone has increased by approximately 90,000 tonnes and the amount of sandstone and igneous rock used for roadstone has decreased by 50,000 tonnes and 130,000 tonnes respectively.

4.2 Use as concrete aggregate has declined by 90,000 tonnes, from 1.32 million in 2015 to 1.23 million in 2016. The reduction is made up of a decline of 130,000 tonnes from limestone sales and 10,000 tonnes of igneous sales. This is partly offset by an increase of 40,000 tonnes of concrete aggregate from sandstone resources.

4.3 Use of primary aggregate for fill/other construction uses rose to 4.23 million tonnes in 2016 from 3.95 million tonnes in 2015, with a significant increase of 330,000 tonnes in the use of limestone. Use of sandstone declined by 10,000 tonnes and use of igneous rock declined by 40,000 tonnes.

4.4 Total limestone sales increased by 290,000 tonnes to 4.42 million tonnes in 2016 from 4.13 million tonnes in 2015. This builds upon the 270,000 tonne increase between 2014 and 2015. Total sandstone sales reduced by 10,000 tonnes to 2.72 million tonnes in 2016 from 2.73 million tonnes in 2015, and total igneous sales decreased by 180,000 tonnes to 1.27 million tonnes in 2016 from 1.45 million tonnes in 2015.

4.5 Fill/other constructional uses remains the primary use for crushed rock, utilising 50% of all sales (up from 47% in 2015). Coated roadstone utilises 23% (down from 26% in 2015), uncoated roadstone utilises 12% (up from 11% in 2015) and concrete aggregate utilises 15% of all rock sales (down from 16% in 2015).

Table 4 Crushed Rock Sales by Mineral Planning Authority 2014-2016 (million tonnes)								
Sub-Region	Mineral Planning Authority	Crushed Rock Sales 2014		Crushed Rock Sales 2015		Crushed Rock Sales 2016		
Powys (inc Brecon Beacons)	Powys	3.22		3.28		3.07		
	Brecon Beacons NP							
South West Wales	Carmarthenshire	1.20	1.84	0.82	1.81	0.77	1.69	
	Neath Port Talbot			0.30		0.28		
	Pembrokeshire	0.53		0.53		0.46		
	Pembrokeshire Coast NP							
	Ceredigion							0.11
	Swansea	0		0		0		
South East Wales	Blaenau Gwent	0.21	2.81	0.31	3.22	0.32	3.65	
	Caerphilly							
	Torfaen	0		0		0		
	Newport	0		0		0		
	Monmouthshire	0		0		0		
	Rhondda Cynon Taf	0.67		0.68		0.70		
	Merthyr Tydfil							
	Bridgend	1.93		2.23		2.63		
	Cardiff							
	Vale of Glamorgan							
TOTAL		7.87		8.31		8.41		

4.6 Table 4 sets out the Crushed Rock aggregate sales figures subdivided by sub-region and Local Planning Authority, however some data has been amalgamated for confidentiality reasons.

4.7 Sales of crushed rock in Powys/BBNPA reduced by 210,000 tonnes between 2015 and 2016.

4.8 Sales in South West Wales declined by 120,000 tonnes in 2016 compared to 2015 although there was a small increase in sales from Ceredigion of 20,000 tonnes. There was a fairly consistent reduction in sales from Carmarthenshire, Neath Port Talbot and Pembrokeshire of 140,000 tonnes. Some of the difference can be explained by reasonably consistent reductions in sales across the region.

4.9 Sales in South East Wales increased by 430,000 tonnes, with 400,000 tonnes being provided from Bridgend/Cardiff/Vale of Glamorgan and 30,000 tonnes being provided from elsewhere in the South East region. There was a similar increase of 410,000 tonnes in 2015 compared to 2014 and may indicate sustained improvement in economic growth and business confidence within the South East Wales Region which is not being replicated in the South West and Powys/BBNPA.

LANDBANK

4.10 A landbank is a stock of planning permissions for the winning and working of minerals. The landbank figures in Table 5 below have been calculated according to the method set out in MTAN 1(Wales) – March 2004, except that no allowance has been made for the demand trend i.e. they have been calculated using the average of the last three years sales. The permitted reserves are those estimated to be suitable for production of saleable aggregates, including low quality fill. Where operators did not provide information on aggregate sales and/or reserves, best estimates have been made from the local knowledge of Local Planning Officers and any past returns.

4.11 Caution must be exercised in using these landbank figures. The landbank calculation does not take account of geographical or operational aspects which may restrict the availability of certain types of reserves. In addition, the reserves in many cases have been estimated using limited sampling and testing information and the marketing conditions prevailing at the time and may be subject to revision.

4.12 Dormant sites have **not** been included in the landbank calculations. Local Planning Authorities should carry out their own assessments of the likelihood of reactivation of each site but in any case dormant reserves must be counted separately.

4.13 It is important to note that reserves earmarked as being suitable for aggregates may also be suitable for non-aggregate use. Many carboniferous limestone hard rock quarries produce significant amounts of rock suitable for both uses and these may change from year to year with market demand. Whilst many quarries may have less than 10% non-aggregates, some may have up to 90%. Non-Aggregate reserves have **not** been included in the landbank calculations.

Table 5

Crushed Rock Reserves and Landbanks on 31.12.2016 by Mineral Planning Authority (million tonnes) based on 3 year average sales 2014-2016

Region	Mineral Planning Authority	Crushed Rock Reserve 31.12.2016	Average Annual Sales 2014-2016	Landbank (years) based on 3 year sales average
Powys (inc Brecon Beacons)	Powys	203.11	3.19	>50
	Brecon Beacons NP			N/A
South West Wales	Carmarthenshire	59.90	0.82	>50
	Neath Port Talbot	16.48	0.30	>50
	Pembrokeshire	27.09	0.50	47
	Pembrokeshire Coast NP			N/A
	Ceredigion	5.37	0.15	36
	Swansea	0	0	0
South East Wales	Blaenau Gwent	32.60	0.28	7
	Caerphilly			>50
	Torfaen	0	0	0
	Newport	0	0	0
	Monmouthshire	*	*	>50
	Rhondda Cynon Taf	66.06	0.68	15
	Merthyr Tydfil			>50
	Bridgend	73.80	2.25	46
	Cardiff			26
	Vale of Glamorgan			32
SOUTH WALES TOTAL		*	*	

4.14 The crushed rock reserves indicated above are made up of the following percentage of rock types:

- Powys/BBNPA – 48% Sandstone, 34% Limestone and 18% Igneous
- South West Wales – 40% Limestone, 40% Sandstone and 20% Igneous
- South East Wales – 84% Limestone, 16% Sandstone

4.15 On the basis of the figures in Table 5, only Blaenau Gwent and RCT have a landbank of less than 25 years. Only Bridgend, Pembrokeshire, Ceredigion, Cardiff and the Vale of Glamorgan have landbanks of greater than 25 years but less than 50 years. Where landbanks exceed 50 years these have been shown as greater than 50 years as some landbanks are arithmetically high due to significant reductions in production but could reduce very quickly if production increased. The arithmetical landbank figures would therefore give a potentially misleading picture.

4.16 The landbank figures in Bridgend have reduced from >50 years to 46 years; the landbank for Cardiff from 29 years to 26 years and the Vale of Glamorgan from 47 years to 32 years. This is primarily due to production in 2016 being significantly higher than the production in 2013 (the year that it replaces in the 3 year average calculation).

4.17 The RTS 1st Review (August 2014) deemed it prudent to consider a ten year average as providing a more reliable baseline than a 3 year average. This is echoed by the Policy Clarification Letter CL-05-14 issued by Welsh Government. Table 6 therefore sets out the crushed rock landbank based a ten year sales average 2007-2016.

Table 6

Crushed Rock Reserves and Landbanks at 31.12.2016 by Mineral Planning Authority (million tonnes) based on 10 year average sales 2007-2016

Region	Mineral Planning Authority	Crushed Rock Reserve 31.12.2016	Average Annual Sales 2007-2016	Landbank (years) based on 10 year sales average
Powys (inc Brecon Beacons)	Powys	203.11	2.95	>50
	Brecon Beacons NP			N/A
South West Wales	Carmarthenshire	59.90	0.84	>50
	Neath Port Talbot	16.48	0.47	35
	Pembrokeshire	27.09	0.72	33
	Pembrokeshire Coast NP			N/A
	Ceredigion	5.37	0.19	28
	Swansea	0	0	0
South East Wales	Blaenau Gwent	32.60	0.56	8
	Caerphilly			>50
	Torfaen	0	0	0
	Newport	0	0	0
	Monmouthshire	*	*	>50
	Rhondda Cynon Taf	66.06	0.76	16
	Merthyr Tydfil			>50
	Bridgend	73.80	2.07	47
	Cardiff			34
	Vale of Glamorgan			28
SOUTH WALES TOTAL		*	*	

4.19 The 10 year average sales figures have generally been higher across the board than the 3 year average sales figures since the economic recession in 2008. However, there are now signs that the three year average production figures are starting to exceed the ten year production average figures in a number of Local Planning Authority areas. Powys, Brecon Beacons National Park, Blaenau Gwent, Bridgend, Cardiff and RCT have sales over the last

three years which are higher than the 10 year average. This trend indicates that planning purely on the basis of the ten year average production figure could lead to under-provision in those areas.

4.20 The landbank changes from 2015 to 2016 based on the 10 year average do not show the same variation in figures as those based on the 3 year average. The only significant variations occurred in Cardiff and the Vale of Glamorgan where the landbank increased despite recovering sales. The reason behind this variation is that the sales in 2016 were still lower than in 2006 (the year it replaced in the 10 year average calculation).

4.21 Using the 10 year sales average, landbanks across the SWRAWP region are still relatively healthy, with only Blaenau Gwent and RCT having a landbank of 25 years or less.

Table 7 Crushed Rock Reserves at Dormant Sites by Mineral Planning Authority (million tonnes)		
Region	Mineral Planning Authority	Crushed Rock Reserve 31.12.2016
Powys (inc Brecon Beacons)	Powys	0.36
	Brecon Beacons NP	
South West Wales	Carmarthenshire	13.82
	Ceredigion	0
	Pembrokeshire	0
	Pembrokeshire Coast NP	
	Neath Port Talbot	0
	Swansea	0
South East Wales	Blaenau Gwent	5.21
	Caerphilly	
	Torfaen	0
	Newport	0
	Monmouthshire	0
	Rhondda Cynon Taf	0
	Merthyr Tydfil	
	Bridgend	13.15
	Cardiff	
	Vale of Glamorgan	
SOUTH WALES TOTAL		32.54

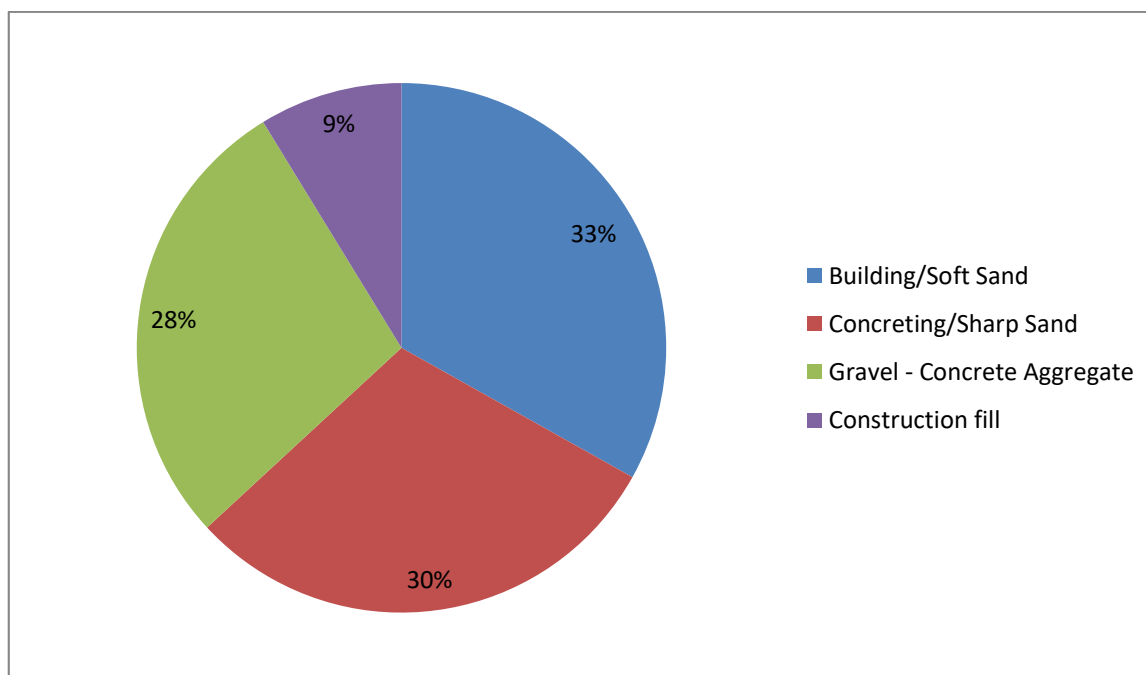
4.22 Table 7 above sets out the reserves of crushed rock at dormant sites which could be included separately within landbanks provided there is an assessment which concludes that the sites are likely to work again in the future.

5.0 LAND WON SAND & GRAVEL

Table 8
Land won Sand & Gravel Sales by end use 2016

	Million tonnes 2016	2016 %	Million tonnes 2015	2015 %
Building/soft sand for coating for asphalt/mortar	0.05	33	0.07	26
Concreting/sharp sand	0.05	30	0.06	22
Gravel – concrete aggregate, other uses	0.05	28	0.03	11
Raised material for constructional fill/unknown	0.01	9	0.11	41
Total	0.16	100	0.27	100

FIGURE 3 – Land Won Sand and Gravel by End Use 2016



5.1 The main change has been the 110,000 tonne decrease in the amount of land won sand and gravel used for aggregate in 2016. At the same time there has been an 87,000 tonne increase in material used for Non-Aggregates purposes in 2016. It would appear that there is an annual switch back and forth between Aggregate to Non-Aggregate occurring at one particular site.

Table 9 Land Won Sand & Gravel Sales by Mineral Planning Authority (million tonnes)				
Region	Mineral Planning Authority	Sand & Gravel Sales 2014	Sand & Gravel Sales 2015	Sand & Gravel Sales 2016
Powys (inc Brecon Beacons)	Powys	0.20	0.27	0.16
South West Wales	Carmarthenshire			
	Ceredigion			
	Pembrokeshire Coast NP			

5.2 Table 9 shows the Mineral Planning Authorities where land won sand and gravel is produced. The total sales for 2016 have decreased almost to 2009 levels. The reduction seen in 2016 appears to be largely accounted for by an increase in material being used for Non Aggregate purposes.

LANDBANK

5.3 Table 10 and Table 11 below set out the land won sand and gravel landbank in the same way as the crushed rock landbank has been set out in Section 4 above. Table 10 is based on a three year sales average and Table 11 is based on a 10 year sales average. Dormant sites have **not** been included.

Table 10 Land Won Sand & Gravel Reserves and Landbanks by Mineral Planning Authority (million tonnes) based on 3 year average sales 2014-2016				
Region	Mineral Planning Authority	Sand & Gravel Reserve 2016	Average Annual Production 2014-2016	Landbank (years) based on 3 year sales average
Powys (inc Brecon Beacons)	Powys	3.31	0.21	>50
South West Wales	Carmarthenshire			>50
	Ceredigion			6
	Pembrokeshire Coast NP			N/A

Table 11

Land Won Sand & Gravel Reserves and Landbanks by Mineral Planning Authority (million tonnes) based on 10 year average sales 2007-2016

Region	Mineral Planning Authority	Sand & Gravel Reserve 2016	Average Annual Sales 2007-2016	Landbank (years) based on 10 year sales average
Powys (inc Brecon Beacons)	Powys	3.31	0.23	>50
South West Wales	Carmarthenshire			>50
	Ceredigion			5
	Pembrokeshire Coast NP			N/A

5.4 On the basis of either the 3-year or 10-year landbank calculations only Ceredigion has a landbank of less than 22 years. The significant reduction in landbank in Ceredigion based on both the 3-year or 10-year production average is due to the reclassification of a significant portion of reserves at one site as non-aggregate reserves. The RTS 1st Review suggests that the four Mineral Planning Authorities in South West Wales work collaboratively to plan strategically for adequate reserves of land won sand and gravel in the period up until 2033 rather than relying on Ceredigion in isolation. Discussions between the four Authorities have taken place during 2016 and will continue.

5.5 Care must be exercised in relying on the landbank figures for Powys and Carmarthenshire as these are based on very small annual sales from relatively small sites.

6.0 MARINE DREDGED SAND & GRAVEL

6.1 Marine Dredged Sand and Gravel is landed in the Region by Cemex UK Marine Ltd, Hanson Aggregates Marine Ltd, Tarmac Marine Ltd, Severn Sands Ltd and Llanelli Sand Dredging Ltd.

6.2 Dredging Licences (as at December 2016) exist for North Middle Ground, Holm Sands and Nobel Bank. A site with planning permission at Bedwyn Sands, Monmouthshire also contributes towards sales data.

Table 12
Port Statistics for Marine Dredged Aggregate Landings 2016

Mineral Planning Authority	Landing Port	2014 Tonnages	2015 Tonnages	2016 Tonnages
Neath Port Talbot	Briton Ferry/Port Talbot	7,085	4,789	5,797
Carmarthenshire	Burry Port	73,347	110,112	84,594
Cardiff	Cardiff Docks	185,924	169,067	153,221
Pembrokeshire	Port of Pembroke	14,462	24,531	42,911
Newport	Newport Docks	215,754	241,776	273,751
Monmouthshire (Bedwyn Sands)	Newport/Chepstow	*	*	*
Swansea	Swansea Docks	136,271	103,481	91,310
Total		632,843	653,756	651,584

Source: The Crown Estate Summary of Statistics 2014, 2015 and 2016

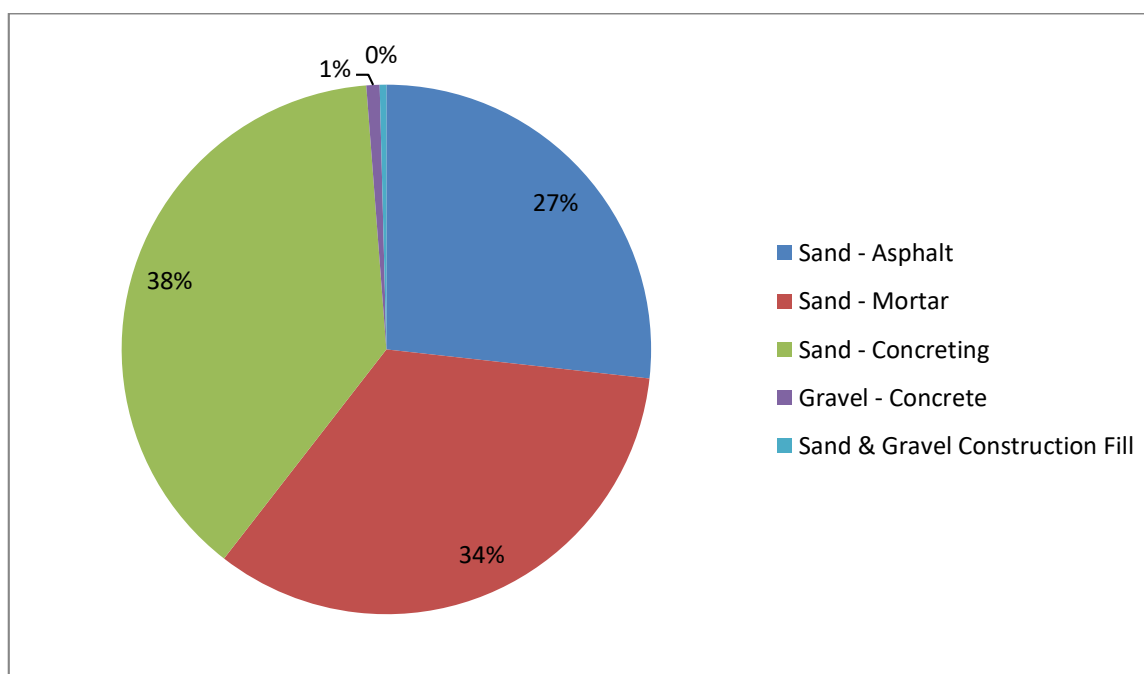
* The aggregate removed from the Bedwyn Sands in Monmouthshire is above low water mark and is therefore under the jurisdiction of the Local Planning Authority. The material is landed in Newport and Chepstow by a single company. The landing data is therefore confidential.

6.3 Landings of marine sand and gravel have remained largely stable between 2015 and 2016. Significantly increased landings have occurred in Newport and Pembroke but these have been offset by reductions in Carmarthenshire, Cardiff and Swansea.

Table 13
Marine Sand & Gravel Sales by end use 2016

	Tonnes 2016	2016 %	Tonnes 2015	2015 %
Sand – Asphalt	248,523	27	247,953	22
Sand – Mortar	313,568	34	340,787	30
Sand – Concreting	355,589	38	418,819	37
Gravel (suitable for concrete aggregates)	7,507	1	43,862	4
Sand & Gravel (suitable for construction fill)	3,757	<1	4,161	1
Undifferentiated Aggregate Use	0	0	69,678	6
Total	928,944	100	1,125,260	100

FIGURE 4 – Marine Sand and Gravel Sales by End Use 2016



6.4 Marine Sand and Gravel Sales in 2016 have significantly exceeded the amount of material dredged from the Crown Estate. Part of the reason for this difference is that sales figures include material dredged from the Bedwyn Sands which is not within the Crown Estate. In addition, there would be sales from stocks being held at the wharfs and differences in timing between sales and landings. Conversion factors from cubic metres to tonnes may also be playing a part.

6.5 Sales of marine sand and gravel have decreased substantially from 1.125 million tonnes in 2015 to 929,000 tonnes in 2016. The use of marine sand for asphalt has remained stationary but there have been significant reductions in sand used for all other uses. Sand used for mortar saw a dramatic reduction from 465,968 tonnes in 2014 to 340,787 tonnes in 2015 and has fallen again to 313,568 tonnes in 2016. Sand used for concreting and gravel used for concreting have also reduced significantly from 418,819 and 43,862 tonnes respectively in 2015 to 355,589 and 7,507 tonnes respectively in 2016

7. SECONDARY AGGREGATES

7.1 Secondary Aggregates are usually defined as

- aggregates obtained as a by-product of other quarrying and mining operations, such as china clay waste, slate waste and colliery spoil, or
- aggregates obtained as a by-product of other industrial processes, such as blast furnace slag, coal-fired power station ash, incinerator ash and spent foundry sand.

A list of Secondary Aggregate sites within the SWRAWP Region is set out in Appendix C

Table 14
Secondary Aggregate Sales by end use 2016 (million tonnes)

	Million Tonnes 2016	% 2016	Million Tonnes 2015	% 2015
Coated Roadstone	0	0	0	0
Uncoated Roadstone	0.53	73	0.14	56
Railway Ballast	0	0	0	0
Concrete Aggregate	0.11	15	0.08	32
Other Constructional Uses/Unknown	0.09	12	0.03	12
Artificial Aggregate	0	0	0	0
Total	0.74	100	0.25	100

FIGURE 5 – Secondary Aggregate Sales by End Use 2016

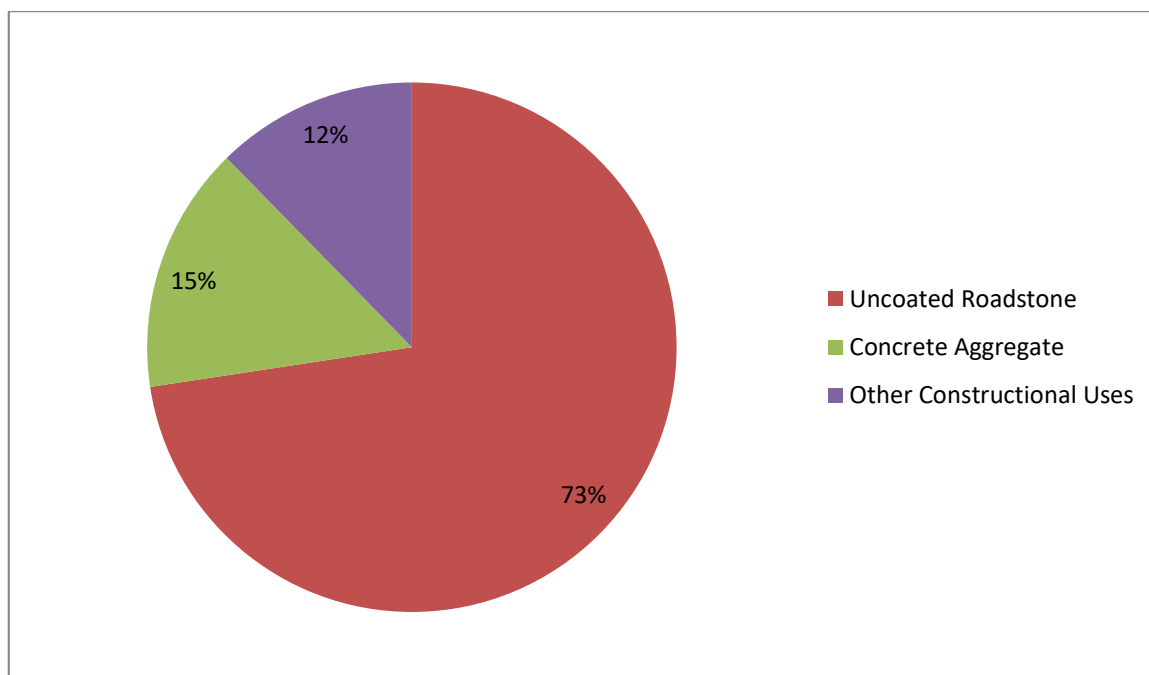


Table 15

Secondary Aggregate Sales by Mineral Planning Authority 2016 (million tonnes)

Region	Mineral Planning Authority	Secondary Aggregate Sales 2014	Secondary Aggregate Sales 2015	Secondary Aggregate Sales 2016
Powys (inc Brecon Beacons)	Powys	0.75	0.25	0.74
South West Wales	Pembrokeshire			
	Neath Port Talbot			
South East Wales	Cardiff			
	Vale of Glamorgan			

7.2 Secondary Aggregate Sales have recovered during 2016 to the same level as 2014 following a significant drop in sales during 2015.

7.3 In 2016, 73% (up from 56%) of the secondary aggregate sold was used for roadstone, 15% (down from 32%) was used as concrete aggregate and 12% (no change) for other constructional uses.

7.4 The latest Survey of Industrial and Commercial Waste Generated in Wales 2012, published by Natural Resources Wales, indicates that 34% of the Industrial Waste arising in Wales comes

from combustion waste and 89% of that combustion waste comes from the energy supply sector. This equates to approximately 600,000 tonnes per annum. The Survey also indicated that landfill accounted for 71% of combustion waste with only 23% being re-used. In South Wales the primary source of combustion waste is currently Aberthaw B.

7.5 The Survey of Industrial and Commercial Waste Generated in Wales 2012 treated blast furnace slag as a 'Non-Waste'. This material was not included in the report but the technical appendices indicate approximately 2 million tonnes was generated in South Wales in 2012, 1.75 million tonnes from South West Wales and 0.25 million tonnes from South East Wales. The survey data indicates that 98% of this material is prepared for re-use or recycled. Not all of this material is used for aggregate purposes and a significant percentage (approximately 60%) is used for non-aggregate purposes.

8. RECYCLED AGGREGATES

8.1 Recycled Aggregates are defined as aggregates obtained from the demolition or construction of buildings or structures or from civil engineering works, including asphalt road planings and railway ballast. A list of known aggregate recycling facilities in the SWRAWP Region is set out in Appendix D.

8.2 Even though recycled materials play an increasingly important role as a substitute for primary aggregates it is difficult to obtain accurate figures of the volumes produced. The latest Survey of Construction and Demolition Waste Generated in Wales was carried out in 2012.

8.3 The Survey of Construction and Demolition Waste Generated in Wales 2012, published by Natural Resources Wales indicates that a total of 2.62 million tonnes of construction and demolition waste was generated in South Wales (not including North Powys). Of this total, 1.44 million tonnes was generated in South East Wales and 1.18 million tonnes in South West Wales.

8.4 In South East Wales 47% (677,000 tonnes) of C&D waste generated was aggregate and in South West Wales 23% (271,000 tonnes) was aggregate. In Wales approximately 90% of C&D waste aggregate is either prepared for re-use or recycled and only 2% is landfilled. The recovery target for non-hazardous C&D waste in Towards Zero Waste is 70%.

ROAD PLANING ARISING

8.5 No data available.

9. RTS 1st REVIEW

9.1 The Regional Technical Statement (RTS) is a requirement of Minerals Technical Advice

Note 1: Aggregates (MTAN1) which was issued by the Welsh Government in March 2004.

9.2 MTAN1 sets an overarching objective which seeks to ensure a sustainably managed supply of aggregates (which are essential for construction), striking the best balance between environmental, economic and social considerations. The RTS provides a strategic basis for LDPs in the region.

9.3 The first Regional Technical Statement for the area covered by the South Wales Regional Aggregates Working Party was published in October 2008. The RTS 1st Review was published in August 2014.

9.4 The RTS 1st Review recommends that the future quantities of aggregate which need to be provided for from each Local Planning Authority area (apportionment) is based on a 10 year average of sales, refined as necessary to take account of other factors of sustainability. The apportionment is calculated over 25 years for crushed rock (LDP period plus 10 years) and 22 years for sand and gravel (LDP period plus 7 years).

9.5 The annual crushed rock apportionments contained within Table 5.1 of the RTS are provided in Table 16 below together with the sales figure for 2016. The purpose of this comparison is to assess whether there is a danger of under-provision within any Local Authority area. There is no requirement for a Local Planning Authority to maintain or limit their annual sales in line with either the annualised apportionment or the historical sales average. Sales exceeding the annualised sales figure is merely an early warning that aggregate reserves are being used more quickly than anticipated in the RTS and there may be a danger of under-provision within the Local Development Plan period. Further detailed assessment would be required in each case.

Table 16**Crushed Rock Sales in 2016 by Mineral Planning Authority (million tonnes) in comparison to the RTS annualised apportionment**

Region	Mineral Planning Authority	Crushed Rock Sales 2016	RTS Annualised Apportionment
Powys (inc Brecon Beacons)	Powys	3.07	2.51
	Brecon Beacons NP		0.55
South West Wales	Carmarthenshire	0.77	1.07
	Neath Port Talbot	0.28	0.59
	Pembrokeshire	0.46	0.55
	Pembrokeshire Coast NP		0.29
	Ceredigion	0.18	0.20
	Swansea	0	0
South East Wales	Blaenau Gwent	0.32	0.17
	Caerphilly		0.76
	Torfaen	0	0
	Newport	0	0
	Monmouthshire	0	0.12
	Rhondda Cynon Taf	0.70	0.69
	Merthyr Tydfil		0.27
	Bridgend	2.63	0.75
	Cardiff		0.86
	Vale of Glamorgan		1.09
SOUTH WALES TOTAL		8.41	10.47

9.6 Sales in 2016 for Powys, Blaenau Gwent, RCT and Cardiff exceeded the annualised apportionment figure. In the South Wales context as a whole, sales were approximately 80% of the total annualised apportionment required within the region.

9.7 The RTS recommended minimum allocations necessary in each of the following Local Planning Authority areas – Neath Port Talbot (5.75 million tonnes), Vale of Glamorgan (13.55 million tonnes), RCT (4.25 million tonnes) and Blaenau Gwent (1.25 million tonnes). The required allocation in Neath Port Talbot has been provided by a planning permission at Gilfach Quarry in 2012. Part of the allocation in RCT has been met by a planning permission at Forest Wood Quarry. Allocations have been made by both Blaenau Gwent and RCT in their Local Development Plan to address the requirements of the RTS. The Vale of Glamorgan has not made any allocations for new sites in its Local Development Plan based on revised reserve calculations at existing sites and an assessment of the likely utilisation of dormant reserves within the County. A planning permission for a relatively small additional reserve has been granted in the Vale of Glamorgan at Forest Wood Quarry.

9.8 The annual sand and gravel apportionments contained within the RTS are provided in Table 17 together with the sales figure for 2016.

Table 17 Sand and Gravel Sales in 2016 by Mineral Planning Authority (million tonnes) in comparison to the RTS annualised apportionment			
Region	Mineral Planning Authority	Sand & Gravel Sales 2016	RTS Annualised Apportionment
South West Wales	Carmarthenshire	0.16	0.33
	Pembrokeshire		
	Pembrokeshire Coast NP		
	Ceredigion		
SOUTH WALES TOTAL		0.16	0.33

9.9 The RTS notes that the apportionment recommendations do not take fully into account all factors that may be material to the ensuring of an adequate supply of aggregates obtained from appropriately located sources. Such factors include:-

- The technical capability of one type of material to interchange for another.
- The relative environmental cost of substitution of one type of material by another.
- The relative environmental effects of changing patterns of supply.
- Whether adequate production capacity can be maintained to meet the required supply.

9.10 The RTS also states that where it is justified by new evidence, it is open for individual Local Planning Authorities to depart from the apportionment and allocation figures recommended in the RTS. In doing so however, a Local Planning Authority would need to demonstrate that their intended departure would not undermine the overall strategy provided by the RTS itself.

10. MAJOR INFRASTRUCTURE PROJECTS

Major infrastructure projects are an important consideration in the assessment of the future demand for aggregates. The following is a list of projects which may have an impact on future demand if they go ahead

M4 Newport Relief Road from Magor to Castleton

Circuit of Wales, Blaenau Gwent

A465 Heads of the Valleys Road dualling

Cardiff Eastern Bay Link Road

Swansea Bay Tidal Lagoon

Cardiff/Newport Tidal Lagoon

Cardiff Capital Region Metro Project

Severn Barrage

A4226 Five Mile Lane Improvements (Weycock Cross, Barry to Sycamore Cross)

Newtown By-pass

Swansea City Centre and Fabian Way Redevelopment

Student Accommodation and Office Developments in Cardiff

11. MONITORING OF PLANNING APPLICATIONS

Planning Applications and Decisions in 2016							
Planning Reference	Site Name	Type	Mineral	Reserve (mt)	Date Submitted	Decision	Decision Date
03/P/09336	Tirpentwys (Torfaen)	Tip	Sandstone	4.75	10.11.03		
A041228MN	Crug yr Eryr (Ceredigion)	Ext	Sand & Gravel	0.15	27.09.04	Approved	10 March 2016
A06008MN	Llechwedd Dderi (Ceredigion)	New	Sand & Gravel	0.06	04.01.06	Approved	16 June 2016
DC/2015/0450	Bedwyn Sands (Monmouthshire)	Time Ext to 2022	Marine Sand	0.25 p.a.	14.04.15		
14/0128/MN	Penlan Quarry (Pembrokeshire)	Ext	Shale	0.05	23.05.14	Approved	9 June 2016
15/0666/10	Craig yr Hesg, Pontypridd, (Rhondda Cynon Taf)	Ext	Sandstone	10	15.05.15		
15/01953/MJR	Creigiau Quarry (Cardiff)	Consolidat ion/Ext	Limestone	12.78	04.08.15	Approved subject to S106	
15/0662/MN	Glogue Quarry (Pembrokeshire)	Ext	Slate	0.45	18.09.15	Approved	27 Sep 2016
W/33265	Torcoed/Crwbin (Carmarthenshire)	Consolidat ion/Ext	Limestone	11	07.01.16		
P/2016/0455	Dolyhir & Strinds Quarries (Powys)	Consolidat ion/Ext	Sandstone	23	25.04.16		

12. MONITORING REVIEWS OF MINERAL PERMISSIONS

ROMP Applications in 2016							
Planning Reference	Site Name	Type	Mineral	Reserve (mt)	EIA	Date Submitted	Decision Date
P/97/0085	Gaens Quarry (Bridgend)	Initial	Limestone	8	Yes	30 January 1997	22 Dec 2016
P/97/0618	Grove Quarry (Bridgend)	Initial	Limestone	12	Yes	26 June 1997	22 Dec 2016
P/97/0623	Cornelly Quarry (Bridgend)	Initial	Limestone	42	Yes	30 June 1997	22 Dec 2016
P/16141	Blaenonnau Quarry (BBNPA)	Det of Cond	Limestone	23.9	Yes	7 September 1998	Suspended
W/19666	Coygen Quarry (Carmarthenshire)	Periodic	Limestone	4.5	Yes	27 July 2008	
W/21986	Maesdulais Quarry (Carmarthenshire)	Det of Cond	Limestone	0.225	Yes	5 November 2009	
11/06445	Penderyn Quarry (BBNPA)	Periodic	Limestone	26.3	Yes	24 March 2011	
E/26450	Alltygarn Quarry (Carmarthenshire)	Periodic	Silica Sandstone	2.77	Yes	11 April 2012	
NP/12/0601	Carew Quarry (PCNPA)	Periodic	Limestone	3.7	Yes	13 December 2012	
P/2013/0642	Caerfagu Quarry (Powys)	Periodic	Sand & Gravel	0.1	Yes	20 June 2013	Suspended
W/29443	Blaenyfan Quarry (Carmarthenshire)	Periodic	Limestone	1.9	Yes	9 January 2014	
15/0365/MN	Blaencilgoed Quarry (Pembrokeshire)	Periodic	Limestone	10	Yes	30 June 2015	

13. MONITORING EXTRACTION END DATES AND REVIEW DATES

Mineral Planning Authority	Site Name	Mineral Type	Mineral Extraction Ends	ROMP Review Date
Blaenau Gwent	Trefil	Limestone	31 Dec 2024	N/A
Brecon Beacons National Park	Ammanford	Limestone	21 Feb 2042	N/A
	Penderyn	Limestone	21 Feb 2042	Pending
	Blaen Onneu	Limestone	21 Feb 2042	Pending
	Vaynor (shared with Merthyr Tydfil)	Limestone	31 May 2097	01 Jan 2019
	Llanfair	Sandstone	21 Feb 2042	Dormant
	Cefn Cadlan	Sandstone	21 Feb 2042	Dormant
Bridgend	Cornelly	Limestone	31 Dec 2056	22 Dec 2031
	Gaens	Limestone	06 Jan 2068	22 Dec 2031
	Grove	Limestone	31 Dec 2056	22 Dec 2031
	Stormy Down	Limestone	21 Feb 2042	Dormant
	Cefn Cribbwr	Sandstone		
Caerphilly	Machen	Limestone	31 Dec 2042	22 Jun 2021
	Cwm Leyshon	Limestone	21 Feb 2042	27 Oct 2025
	Blaengwynlais (shared with Cardiff)	Limestone	21 Feb 2042	26 Sep 2029
	Hafod Fach	Limestone	10 July 2000	31 Dec 2027
	Bryn	Sandstone	31 Dec 2022	N/A
	Cefn Onn	Limestone	21 Feb 2042	Dormant
Cardiff	Creigiau	Limestone	21 Feb 2042	31 Mar 2018
	Taffs Well	Limestone	31 Dec 2027	8 Apr 2019
	Ton Mawr	Limestone	31 Dec 2022	8 Apr 2019
	Blaengwynlais (shared with Caerphilly)	Limestone	21 Feb 2042	16 Oct 2029
	Cefn Garw	Limestone		
Carmarthenshire	Alltygarn	Sandstone	21 Feb 2042	Pending
	Blaenyfan	Limestone	21 Feb 2042	Pending
	Coygen	Limestone	21 Feb 2042	Pending
	Maesdulais	Limestone	21 Feb 2042	Pending
	Crwbin	Limestone	21 Feb 2042	31 Mar 2017
	Cilyrychen	Limestone	21 Feb 2042	31 Mar 2017
	Garn Wen	Igneous	21 Feb 2042	01 Feb 2024
	Garn Bica	Limestone	21 Feb 2042	16 Apr 2024
	Torcoed	Limestone	19 July 2031	06 Mar 2028
	Dinas	Sandstone	31 Dec 2070	8 Oct 2028
	Llwynjack	Sand & Gravel	21 Feb 2042	8 Jan 2029
	Limestone Hill	Limestone	21 Feb 2042	Dormant
	Llwynyfran	Limestone	21 Feb 2042	Dormant
	Penybanc	Limestone	21 Feb 2042	Dormant
	Pwllymarch	Limestone	21 Feb 2042	Dormant
	Ty'r Garn	Limestone	21 Feb 2042	Dormant
	Cynghordy	Sandstone	21 Feb 2042	Dormant
	Garn	Sandstone	21 Feb 2042	Dormant
	Cerrig-yr-wyn	Igneous	21 Feb 2042	Dormant
	Glantowy	Sand & Gravel	21 Feb 2042	Dormant
	Foelfach	Sandstone	15 Aug 2019	N/A
	Coedmoelion	Sandstone	30 Oct 2018	N/A

	Pennant	Sandstone	6 Apr 2020	N/A
Ceredigion	Alltgoch (and Bryn)	Sandstone	21 Feb 2042	N/A
	Penparc	Sand & Gravel	15 Mar 2029	25 Mar 2019
	Crug Yr Eryr	Sand & Gravel	10 Mar 2026	N/A
	Esgair Newydd	Sandstone/Shale	31 Aug 2019	N/A
	Glanyrafon	Sand & Gravel	30 Sep 2024	N/A
	Gwarallt Faerdre	Sandstone	01 Nov 2021	N/A
	Llechwedd Dderi	Sand & Gravel	16 Mar 2019	N/A
	Moelfryn Maen	Shale/Shale	13 Apr 2021	N/A
	Pant	Sand & Gravel	31 Dec 2023	17 Dec 2017
	Tylau	Sandstone/Shale	01 Dec 2033	N/A
	Ystrad Meurig	Sandstone	31 Jan 2052	28 Nov 2028
Merthyr Tydfil	Gelligaer	Sandstone	2 April 2076	9 Dec 2030
	Vaynor (shared with BBNPA)	Limestone	31 May 2097	01 Jan 2019
Monmouthshire	Ifton	Limestone	26 Feb 2045	N/A
Neath Port Talbot	Cwm Nant Lleici	Sandstone	01 Jul 2026	15 Apr 2024
	Gilfach	Sandstone	28 Feb 2028	21 Feb 2027
	Port Talbot	Sand	21 Feb 2042	10 Feb 2032
Pembrokeshire Coast National Park	Carew	Limestone	31 Dec 2035	Pending
	Syke	Igneous/Sandstone	21 Feb 2042	9 Jun 2030
	Rhyndaston	Igneous	17 Nov 2023	N/A
	Pantgwyn	Sand & Gravel	16 Mar 2024	N/A
	Trefigin	Sand & Gravel	16 Mar 2029	4 Oct 2026
	Penberry	Igneous	21 Feb 2042	Dormant
Pembrokeshire	Blaencilgoed	Limestone	21 Feb 2042	Pending
	Cefn	Sandstone	3 Jul 2027	N/A
	Plascwrt Farm	Igneous	12 Nov 2024	N/A
	Slade Hall Farm	Shale	24 May 2021	N/A
	Glogue	Slate	13 Sep 2023	N/A
	Penlan	Shale	9 Jun 2023	N/A
	Pope Hill	Shale	6 Sep 2021	N/A
	Tangiers Farm	Shale	1 Oct 2023	N/A
	Cotts Lane	Shale	30 Apr 2018	N/A
	Cronllwyn	Slate Waste	3 Nov 2019	N/A
	Keeston Borrow Pit	Shale	25 Jul 2016	N/A
	Bolton Hill	Igneous	10 Feb 2053	24 Apr 2024
	Treffgarne	Igneous	21 Feb 2042	Dormant
	Gilfach	Shale	21 Feb 2042	Dormant
	Rushacre Farm	Shale	17 Apr 2022	N/A
Powys	Caerfagu	Sand & Gravel	21 Feb 2042	Pending
	Cribarth	Sandstone	18 Jul 2023	N/A
	Gore	Sandstone	21 Feb 2042	31 Mar 2024
	Buttington Brickworks	Sandstone	22 Feb 2042	19 Apr 2026
	Criggion	Igneous	21 Feb 2042	31 Jan 2027
	Dolyhir/Strinds	Sandstone/Limestone	21 Feb 2042	20 Mar 2027
	Llanelwedd	Igneous	21 Feb 2042	N/A
	Little Wernwilla	Sandstone	27 Mar 2018	N/A
	Tan y Foel	Sandstone	31 Dec 2063	16 Sep 2028
	Tredomen	Sandstone	30 Sep 2026	N/A

	Rhayader	Sandstone	21 Feb 2042	29 Nov 2029
	Middletown	Igneous	21 Feb 2042	22 Aug 2030
	Berwin Granite	Igneous	21 Feb 2042	Dormant
	Garreg	Igneous	21 Feb 2042	Dormant
Rhondda Cynon Taf	Craig yr Hesg	Sandstone	31 Dec 2022	24 Apr 2028
	Forest Wood (shared with Vale)	Limestone	21 Feb 2042	N/A
	Hendy Quarry	Limestone	21 Feb 2024	N/A
Vale of Glamorgan	Lithalun	Limestone	31 Dec 2020	N/A
	Pantyffynnon	Limestone	21 Feb 2042	06 Nov 2024
	Forest Wood (shared with RCT)	Limestone	21 Feb 2042	15 Apr 2026
	Pant	Limestone	21 Feb 2042	30 May 2029
	Argoed Isha	Limestone	21 Feb 2042	Dormant
	Cnap Twt	Limestone	21 Feb 2042	Dormant
	Ruthin	Limestone	31 Dec 2017	Dormant
	St Andrews	Limestone	21 Feb 2042	Dormant
	Beaupre	Limestone	21 Feb 2042	Dormant

14. MONITORING OF DEVELOPMENT PLANS (at 31.12.16)

Mineral Planning Authority	LDP Position
Pembrokeshire Coast National Park	LDP Adopted in September 2010
Caerphilly	LDP adopted in November 2010
Rhondda Cynon Taf	LDP Adopted in March 2011.
Merthyr Tydfil	LDP Adopted in May 2011.
Blaenau Gwent	LDP Adopted in November 2012
Pembrokeshire	LDP Adopted in February 2013
Ceredigion	LDP Adopted April 2013
Bridgend	LDP Adopted September 2013
Torfaen	LDP Adopted in December 2013
Brecon Beacons National Park	LDP Adopted in December 2013
Monmouthshire	LDP Adopted in February 2014
Carmarthenshire	LDP Adopted in December 2014
Newport	LDP Adopted in January 2015
Cardiff	LDP adopted in January 2016
Neath Port Talbot	LDP adopted in January 2016
Vale of Glamorgan	LDP Hearings to be completed January 2017.
Powys	LDP submitted to Welsh Government – February 2016
Swansea	LDP expected to be submitted to Welsh Government in 2017

APPENDIX A

MEMBERS OF THE SOUTH WALES AGGREGATES
WORKING PARTY

(at date of publication)

Llinos Quelch (Chair)
Head of Planning
Carmarthenshire County Council

Hugh Towns (Secretary)
Minerals & Waste Planning Manager
Carmarthenshire County Council

Steve Smith
Development Services Manager
Blaenau Gwent County Borough Council
(Represented by Lynda Healey)

John Cook
Chief Executive/National Park Officer
Brecon Beacons National Park
(Represented by Chris Morgan)

Jonathan Parsons
Head of Planning
Bridgend County Borough Council
(Represented by Susan Jones)

Tim Stephens
Interim Head of Planning
Caerphilly County Borough Council
(Represented by Ruth Amundsen)

James Clemence
Head of Planning
City of Cardiff Council
(Represented by Stuart Williams)

Huw Williams
Head of Lifestyle Services

Russell Hughes-Pickering
Head of Performance and Economy
Ceredigion County Council
(Represented by Graham Dorrington)

Judith Jones
Head of Town Planning
Merthyr Tydfil County Borough Council
(Represented by John Raine)

Mark Hand
Head of Planning, Housing and Place Shaping
Monmouthshire County Council

(Represented by Martin Davies)

Nicola Pearce

Head of Planning and Public Protection
Neath Port Talbot County Borough Council
(Represented by Ceri Morris/Carl Comerford)

Tracey Brooks

Development Services Manager
Newport City Council
(Represented by Lindsay Christian)

Sara Morris

Development Plans & Conservation Manager
Pembrokeshire County Council
(Represented by Bob Smith)

Jane Gibson

Director of Park Direction & Planning
Pembrokeshire Coast National Park
(Represented by Richard James)

Susan Bolter

Head of Regeneration, Property & Commissioning (Place)
Powys County Council
(Represented by Peter Morris)

Jane Cook

Director of Regeneration & Planning
Rhondda-Cynon-Taf County Borough Council
(Represented by Owen Jones)

Phil Holmes

Head of Planning and City Regeneration
City & County of Swansea
(Represented by Ruth Henderson)

Rachel Jowitt

Chief Officer Planning & Public Protection
Torfaen County Borough Council
(Represented by Adrian Wilcock)

Marcus Goldsworthy

Head of Regeneration and Planning

Vale of Glamorgan Council
(Represented by Victoria Robinson)

Nick Horsley
Planning Director
Mineral Products Association

Mark Russell
Representative MPA - BMAPA
Mineral Products Association

Mark Frampton
Representative MPA - Hanson UK
Mineral Products Association

Malcolm Lawer
Representative MPA –Tarmac
Mineral Products Association

Mike McGee
Representative MPA - Cardigan Sand and Gravel
Mineral Products Association

Murray Alston
British Aggregates Association

Joanne Smith
Welsh Government
Planning Division

James Cooke
Welsh Government
Dept. for Economy, Science and Transport

Peter Jordan
Natural Resources Wales

M Wrigley/N Everington
The Crown Estate

Vacant
British Geological Survey

J Cuddy
Cuddy Demolition & Dismantling

Vacant
RWE npower

APPENDIX B

Sites Included In 2016 Aggregates Mineral Survey

Mineral Planning Authority	Site Name	Mineral Type	Site Owner or Operator	Designation
Blaenau Gwent	Trefil	Limestone	Gryphon Quarries Ltd	Active
Brecon Beacons	Ammanford	Limestone	Messrs Williams	Active

National Park			& Griffiths	
	Penderyn	Limestone	Hanson UK	Active
	Blaen Onneu	Limestone	Hanson UK	Suspended
	Llanfair	Sandstone	Glanusk Estate	Dormant
	Cefn Cadlan		Tredeggar Estate	Dormant
	Vaynor (shared with Merthyr Tydfil)	Limestone	Hanson UK	Inactive
Bridgend	Cornelly	Limestone	Cambrian Stone Ltd	Active
	Gaens	Limestone	TS Rees Ltd	Active
	Grove	Limestone	Cambrian Stone Ltd	Inactive
	Cefn Cribwr	Sandstone	TS Rees Ltd	Inactive
	Stormy Down	Limestone	Hobbs Holdings Ltd	Dormant
Caerphilly	Machen	Limestone	Hanson UK	Active
	Hafod Fach	Sandstone	Tarmac	Inactive
	Bryn	Sandstone	A Price & Co	Active
	Cefn Onn	Limestone	Wyndham Lewis Trust	Dormant
	Cwm Leyshon	Limestone	Hanson UK	Inactive
	Blaengwynlais (shared with Cardiff)	Limestone	Tarmac	Inactive
Cardiff	Blaengwynlais (shared with Caerphilly)	Limestone	Tarmac	Inactive
	Creigiau	Limestone	Tarmac	Inactive
	Cefn Garw	Limestone	Glen Harry Group	Inactive
	Taffs Well	Limestone	Cemex UK Ltd	Active
	Ton Mawr	Limestone	TS Rees Ltd	Active
	Roath Basin Wharf	Marine Sand	Cemex UK Ltd	Active
	Brassways Wharf	Marine Sand	Hanson UK	Active
	Roath Dock	Marine Sand	Tarmac	Active
	Rover Way	Slag/Secondary	Celsa UK	Active
Carmarthenshire Carmarthenshire (Cont.)	Blaenyfan	Limestone	Cemex UK Ltd	Inactive
	Cilyrychen	Limestone	Tarmac	Inactive
	Coygen	Limestone	GD Harries	Active
	Crwbin	Limestone	Tarmac	Inactive
	Torcoed	Limestone	Tarmac	Active
	Garn Bica	Limestone	M Jones	Active
	Limestone Hill	Limestone	D Williams	Dormant
	Llwynyfrân	Limestone	Hobbs Holdings Ltd	Dormant
	Maesdulais	Limestone	M Jones	Dormant
	Penybanc	Limestone	Mrs A Davies	Dormant
	Pwllymarch	Limestone	M Jones	Dormant
	Ty'r Garn	Limestone	G Morgan	Dormant
	Coedmoelion	Sandstone	N Richards	Active
	Pennant	Sandstone	P Bowen	Active
	Alltygarn	Sandstone	Alan Griffiths	Inactive
	Cynghordy	Sandstone	D Roderick	Dormant
	Dinas	Sandstone	Tarmac	Inactive
	Garn	Sandstone	Mrs Morgan	Dormant
	Garn Wen	Igneous	GD Harries	Active

	Cerrig-yr-wyn	Igneous	J Mousley & Sons	Dormant
	Foelfach	Gritstone	P. O'Keefe	Active
	Llwynjack	Sand & Gravel	C Lewis	Active
	Glantowy	Sand & Gravel	A Lewis	Dormant
	Burry Port	Marine Sand	Llanelli Sand Dredging Ltd	Active
Ceredigion	Moelfryn Maen	Shale	RG & JV Jenkins	Active
	Alltgoch	Sandstone	GD Harries	Active
	Ystrad Meurig	Sandstone	Hanson UK	Active
	Esgair Newydd	Shale	C Davies	Active
	Penparc	Sand & Gravel	Cardigan Sand & Gravel Co Ltd	Active
	Cryg yr Eryr	Sand & Gravel	DR Powell	Active
	Pant	Sand & Gravel	R Cutter	Active
	Glanyrafon	Sand & Gravel	CB Environmental	Inactive
	Tylau	Gritstone/Shale	K Morgan	Active
	Llechwedd Dderi Farm	Sand & Gravel	D Jones	Inactive
	Gwarallt Faerdre	Sandstone	I Evans	Inactive
Merthyr Tydfil	Vaynor (shared with BBNPA)	Limestone	Hanson UK	Inactive
	Gelligaer	Sandstone	Hanson UK	Active
Monmouthshire	Ifton	Limestone	Hanson UK	Inactive
	Newport Docks	Marine Sand	Severn Sands Ltd	Active
	Chepstow Wharf	Marine Sand	Severn Sands Ltd	Active
Neath Port Talbot	Cwm Nant Lleici	Sandstone	Aggregate Industries	Active
	Gilfach	Sandstone	Cemex UK Ltd	Active
	Port Talbot Steelworks	Sand	Associated British Ports	Inactive
	Port Talbot	Slag/Secondary	Cambrian Stone Ltd	Active
	Briton Ferry Wharf	Marine Sand	Hope Construction Materials	Active
Newport CBC	Alexandra Dock	Marine Sand	Severn Sands Ltd	Active
	Felnex Wharf	Marine Sand	Hanson UK/Tarmac	Active
Pembrokeshire Coast National Park	Carew	Limestone	T Scourfield & Sons	Active
	Penberry	Igneous	Mr Jamieson	Dormant
	Rhyndaston	Igneous	Mason Bros	Active
	Syke	Igneous/Sandstone	GD Harries	Inactive
	Pantgwyn	Sand & Gravel	L Rees	Active
	Trefigin	Sand & Gravel	Trefigin Quarries Ltd	Active
Pembrokeshire	Cefn	Sandstone	AD Plant	Inactive
	Bolton Hill	Igneous	GD Harries	Active
	Plascwrt Farm	Igneous	M Evans	Inactive
	Slade Hall Farm	Shale	NW Jones	Active
	Glogue	Slate/Secondary	Mansel Davies & Sons	Active

	Treffgarne	Igneous	Various	Dormant
	Penlan	Shale	S Griffiths	Active
	Gilfach	Shale	Mrs G Davies	Dormant
	Pope Hill	Shale	Lawrence Bros	Inactive
	Tangiers Farm	Shale	Mason Bros	Active
	Blaencilgoed	Limestone	GD Harries	Active
	Cotts Lane	Shale	F Credland	Inactive
	Cronllwyn	Slate/Secondary	E Evans	Inactive
	Keeston Borrow Pit	Shale	A Belton	Inactive
	Rushacre Farm	Shale	G. James	Active
Powys	Cribarth	Sandstone	Aggregate Industries Ltd	Inactive
	Gore	Sandstone	Tarmac	Active
	Dolyhir/Strinds	Sandstone/Limestone	Tarmac	Active
	Tan y Foel	Sandstone	HV Bowen & Sons	Active
	Tredomen	Sandstone	K Jones	Active
	Rhayader	Sandstone	Tarmac	Inactive
	Criggion	Igneous	Hanson UK	Active
	Llanelwedd	Igneous	Hanson UK	Active
	Little Wernwilla	Sandstone	R Mills	Active
	Buttington Brickworks	Sandstone	Border Hardcore & Rockery Stone	Active
	Middletown	Igneous	Border Hardcore & Rockery Stone	Active
	Berwyn Granite	Igneous	Powis Estate	Dormant
	Garreg	Igneous	Powis Estate	Dormant
	Caerfagu	Sand & Gravel	Caerfagu Products Ltd	Suspended
Rhondda Cynon Taf	Forest Wood (shared with Vale of Glamorgan)	Limestone	Hanson UK	Active
	Hendy	Limestone	Tarmac	Active
	Craig yr Hesg	Sandstone	Hanson UK	Active
Swansea	Swansea Docks	Marine Sand	Lafarge Tarmac	Active
	Swansea Docks	Marine Sand	Cemex UK Ltd	Active
Vale of Glamorgan	Aberthaw	Limestone	Tarmac	Active
	Garwa Farm	Limestone	Tarmac	Inactive
	Lithalun	Limestone	Hanson UK	Active
	Pantyffynnon	Limestone	Seth Hill & Son	Active
	Wenvoe	Limestone	Cemex UK Ltd	Active
	Forest Wood (shared with RCT)	Limestone	Hanson UK	Active
	Argoed Isha	Limestone	T Pritchard	Dormant
	Ewenny	Limestone	Tarmac	Inactive
	Cnap Twt	Limestone	Duchy of Lancaster	Dormant
	Longlands	Limestone	Green Circle	Active
	Pant	Limestone	Tarmac	Active
	Ruthin	Limestone	Tarmac	Dormant
	St Andrews	Limestone	TJ Bowles	Dormant
	Barry Docks	Marine Sand	Cemex UK Ltd	Inactive
Vale of Glamorgan (cont.)	Aberthaw Power Station	PFA/FBA/Secondary	RWE npower	Active

	Beaupre	Limestone	Unknown	Dormant
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APPENDIX C

List of Secondary Aggregate Sites in South Wales

Celsa UK, Celsa Works, East Moors Road, Cardiff, CF24 5NN

E Evans, Cronllwyn Quarry, Llanychaer, Pembrokeshire

Generation Aggregates, Aberthaw, Vale of Glamorgan

Mansel Davies & Son Ltd, Glogue Quarry, Glogue Pembrokeshire

APPENDIX D

List of Recycled Aggregate Producers in South Wales

Blaenau Gwent

A Lewis Skip Hire, Milfraen View, Blaenant Road, Nantyglo, Ebbw Vale, NP23 4PQ

Bridgend

Shillibiers, 43 Village Farm Industrial Estate, Pyle, CF33 6NU

Caerphilly

Amber Services, The Recycling Centre, Willow Way, Dyffryn Business Park, Ystrad Mynach, Hengoed, CF82 7TR

Bryn Group, Gelliargwellt Farm, Gelligaer, Hengoed, CF82 8FY

GLJ Recycling Ltd, Chapel Farm Industrial Estate, Cwmcarn, Newport, Gwent, NP11 7NL

Hanson at Machen Quarry near Newport.

Penyfan Processing & Recycling Ltd, Penyfan Leisure Park, Manmoel Rd, Manmoel, Blackwood, Gwent, NP12 0HY

Cardiff

Atlantic Recycling, Ty-To-Maen Farm, Newton Road, Rumney, Cardiff, CF3 2EJ

Neal Soil Suppliers Ltd, Ty-To-Maen Farm, Newton Road, Rumney, Cardiff, CF3 2EJ

United Recycled Aggregates Limited, Cardiff Dock Site, Compass Road, Cardiff Docks CF10 4LL

Carmarthenshire

Carmarthenshire Recycling and Environmental Services, Cillefwr Industrial Estate, Carmarthen

Browns Waste Management and Recycling Ltd, Bynea, Llanelli, SA14 9SU

GD Environmental Services Ltd, Taybrite, Heol-Y-Bwlch, Bynea, Llanelli, SA14 9SU

Gwendraeth Valley Recycling Ltd, Carway Fawr Site Office, Cynheidre Colliery, Five Roads, Llanelli, Carmarthenshire, SA15 5YN

T. Richard Jones Ltd, Betws Industrial Park, Foundry Road, Ammanford, SA18 2LS

Ceredigion

CB Environmental Ltd, Rheidol Recycling Park, Glanyrafon Industrial Estate, Llanbadarn Fawr, Aberystwyth, Ceredigion SY23 3JQ

MD Recycling, Unit 1 Crugmor Farm, Penparc, Cardigan SA43 1QY

J D Evans & Sons Water Services, Penparc, Llanarth, Ceredigion SA47 0NR (NB recycling limited to waste arising from their Water Services business only).

Tregaron Trading Services, Abercoed Quarry, Tregaron, SY25 6UG

Monmouthshire

The Woodstock Waste Disposal Unit 7B, Castle Way Severn Bridge Industrial Estate Portskewett Caldicot NP26 5PR

United Recycled Aggregates, Waterways House, Merthyr Road, Llanfoist, Abergavenny, NP7 9PE

Neath Port Talbot

Glass Tech Recycling, Unit 10, Tank Farm Road, Llandarcy, Neath, SA10 6EN

Cuddy Group, Francis House, Tank Farm Road, Llandarcy, Neath, SA10 6EN

Derwen Aggregates, Neath Abbey Wharf, Neath Abbey, Neath Port Talbot, SA10 6BL

Newport

GD Environmental Services Ltd , 19 East Bank Road, Felnex Industrial Estate, Newport, NP19 4PP

Pembrokeshire

Hughes & John, New Croft Garage, Cresselly, Kilgetty, Pembrokeshire, SA68 0TU

Lawrence Brothers, Lawrence Landfill, Pope Hill, Johnston, Haverfordwest

TBS Skips, Plot 10, Waterston Industrial Estate, Milford Haven, Pembrokeshire

RCT

Greens Recycling, The Business Centre, Unit 28, Pontcynon Industrial Estate, Abercynon, CF45 4EP

Lafarge Tarmac Ltd, Hendy Quarry, School Rd, Miskin, CF72 8PG

Tom Prichard Contracting Ltd, Castellau Fach Farm, Llantrisant, CF72 8LP

LCC Wales Ltd, Unit R, Hirwaun Industrial Estate, Rhigos, Aberdare CF44 9UP

Swansea

Construction Recyclate Management, Unit 7, Dyffryn Court, Riverside Business Park, Swansea Vale, Swansea, SA7 0AP

Stenor Environmental Services, Burrows Road, Kings Dock, Swansea, SA1 8QT

Torfaen

Recycled Stone & Soils Ltd, Little Mill Brickworks, Mamhilad, Pontypool

Vale of Glamorgan

Green Cycle, Unit 10, Ty-Verlon Industrial Estate, Cardiff Road, Barry, CF63 2BE

APPENDIX E

SWRAWP PUBLICATIONS

SWRAWP Annual Report 2004

SWRAWP Annual Report 2005

SWRAWP Annual Report 2006

SWRAWP Annual Report 2007

SWRAWP Annual Report 2008

Final RTS October 2008

SWRAWP Annual Report 2009

SWRAWP Annual Report 2010

SWRAWP Annual Report 2011

SWRAWP Annual Report 2012

SWRAWP Annual Report 2013

RTS - First Review August 2014

SWRAWP Annual Report 2014

SWRAWP Annual Report 2015