

**SOUTH WALES REGIONAL
AGGREGATES WORKING PARTY**

ANNUAL REPORT FOR 2019

Published May 2021

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 2019**. 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 2022.

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 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 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 Ministry of Housing, Communities and Local Government (MHCLG) and to the Welsh Government in relation to the supply of, and the demand for, aggregate minerals.

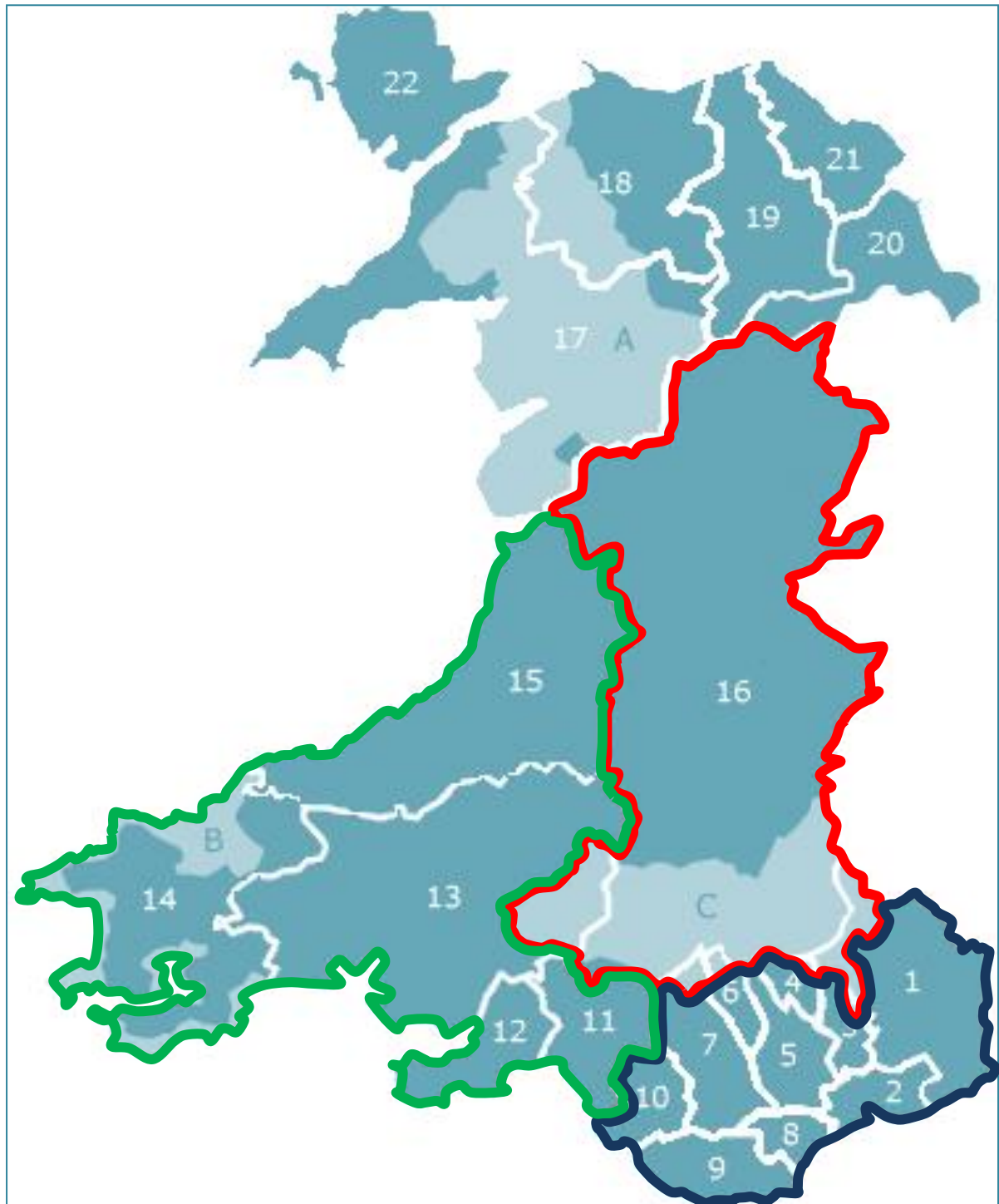
2.2. The SWRAWP is a technical working group with membership drawn from officers of the 18 Local Planning Authorities, representatives of the Mineral Products Association (MPA), the British Aggregates Association (BAA), representatives of the construction and demolition industry, Welsh Government, The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

2.3. Two ordinary meetings of the SWRAWP were held in 2019 – July and November. The July meeting was held jointly with the North Wales RAWP and related only to the RTS 2nd Review.

2.4. Meetings were held with the NWRAWP Secretary and Welsh Government officials to discuss RAWP contract work and the RTS 2nd 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



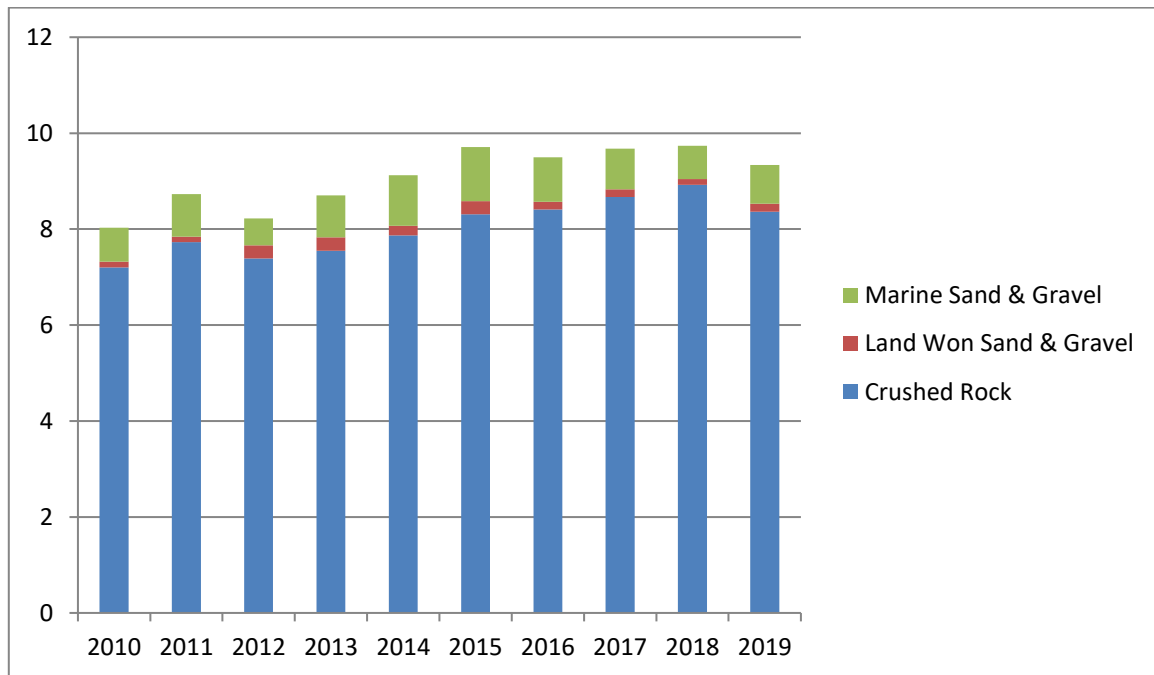
South East Wales	South West Wales
1. Monmouthshire	11. Neath-Port Talbot
2. Newport	12. Swansea
3. Torfaen	13. Carmarthenshire
4. Blaenau Gwent	14. Pembrokeshire
5. Caerphilly	15. Ceredigion
6. Merthyr Tydfil	B. Pembrokeshire Coast National Park
7. Rhondda Cynon Taf	
8. Cardiff	Powys/BBNPA
9. Vale of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

3. AGGREGATE SALES 2010-2019

*Data not available or confidential

Table 1 Primary Aggregate Sales 2010-2019(million tonnes)																	
Year	Crushed Rock					Land Won Sand & Gravel					Marine Dredged Sand & Gravel					All Primary Aggregates	
	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
2010	2.71	1.89	2.65	7.20	89.66	*	*	*	0.12	1.49	0	*	*	0.71	8.84	8.03	-10.3%
2011	2.89	1.99	2.85	7.73	88.54	*	*	*	0.11	1.26	0	*	*	0.89	10.19	8.73	+8.7%
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	-5.8%
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	+5.8%
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	+4.8%
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	+6.5%
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	-2.2%
2017	3.04	1.8	3.83	8.67	89.57	0	0.16	0	0.16	1.65	0	0.19	0.66	0.85	8.78	9.68	+1.9%
2018	2.91	1.99	4.02	8.92	91.58	0	0.12	0	0.12	1.23	0	0.21	0.49	0.70	7.19	9.74	+0.6%
2019	3.04	1.72	3.60	8.36	89.51	0	0.17	0	0.17	1.82	0	0.24	0.57	0.81	8.67	9.34	-4.1%

FIGURE 1 – Primary Aggregate Sales 2010-2019 (million tonnes)



3.1 Table 1 shows the total primary aggregate sales from the region over the 10 year period 2010-2019, 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 decreased by 4.1% in 2019 to 9.34 million tonnes compared to 9.74 million tonnes in 2018. Crushed rock sales fell to 8.36 million tonnes in 2019 compared to 8.92 million tonnes in 2018, with a decrease in sales of 420,000 tonnes being in South East Wales and a decrease of 270,000 tonnes in South West Wales compared to 2018. Sales in Powys/BBNPA were up 130,000 tonnes compared to 2018.

3.5 Marine sand and gravel sales increased to 810,000 tonnes in 2019 compared to 700,000 tonnes in 2018, reversing a 3-year downward trend. There was a significant increase in South East Wales of 80,000. There was also an increase of 30,000 tonnes in marine sand sales in South West Wales.

3.6 Land-won sand and gravel sales in 2019 also increased to 170,000 tonnes from 120,000 tonnes in 2018. Land won sand and gravel sales come exclusively from sites in South West Wales.

3.7 Figure 1 shows that there is an upward trend in total aggregate sales since 2012 but this trend appears to have tailed off since 2015 and shows a decline in 2019.

3.8 Crushed rock accounts for 89.51% of primary aggregate sales with marine landings contributing 8.67% and land won sand and gravel approximately 1.82%. The percentage of total sales made up of crushed rock had been increasing annually since 2015 with the percentage of total sales from marine and land won sand and gravel reducing over the same period. However, 2019 has seen a reversal of that trend.

3.9 South East Wales has the highest crushed rock sales at 3.60 million tonnes (43%), with Powys (including Brecon Beacons) at 3.04 million tonnes (36%) and South West Wales 1.72 million tonnes (21%). Marine sand and gravel sales are highest in South East Wales at 570,000 tonnes (70%) with South West Wales accounting for 240,000 tonnes (30%).

4. CRUSHED ROCK

Table 2
Crushed Rock Sales by Rock type and End Use in 2019 (million tonnes)

	Coated Roadstone	Uncoated Roadstone	Concrete Aggregate	Fill/Other Construction Uses	Rail Ballast	TOTAL AGGREGATE	Total Non-Aggregate
Limestone	0.25	0.74	0.85	2.43	0	4.27	0.71
Sandstone	1.28	0.41	0.17	0.94	0	2.80	0.02
Igneous	0.28	0.06	0.02	0.93	0	1.29	<0.01
TOTAL	1.81	1.21	1.04	4.30	0	8.36	0.74

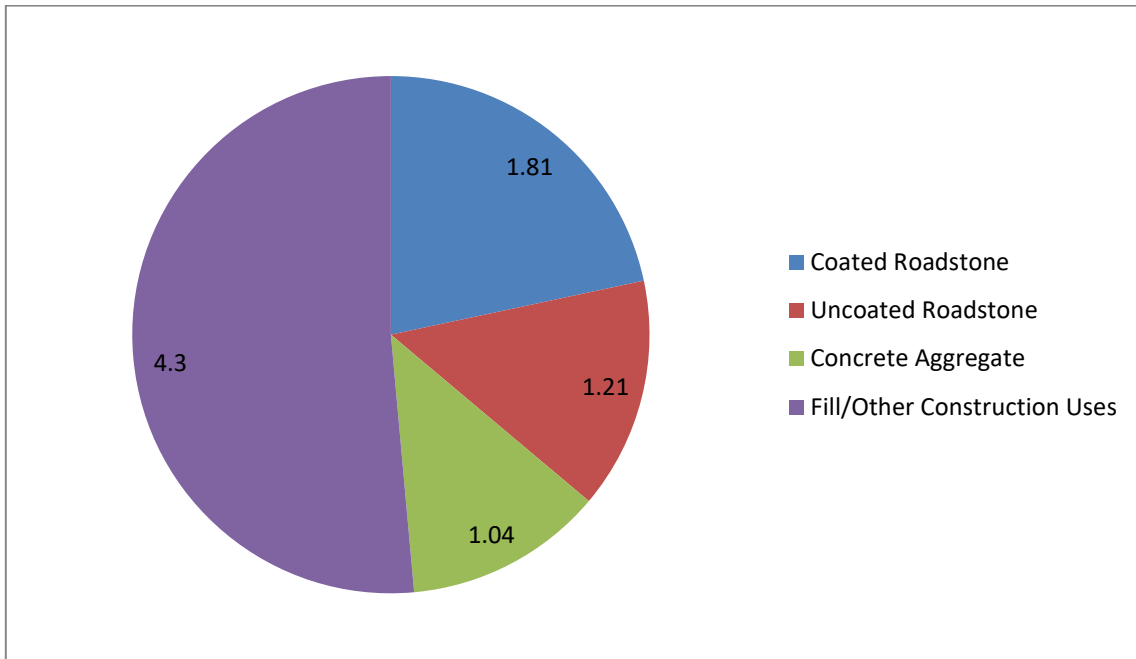
NB - Figures contain estimates where no survey return was provided

Table 3
Crushed Rock Sales by Rock type and End Use in 2018 (million tonnes)

	Coated Roadstone	Uncoated Roadstone	Concrete Aggregate	Fill/Other Construction Uses	Rail Ballast	TOTAL AGGREGATE	Total Non-Aggregate
Limestone	0.26	0.75	0.86	2.79	0	4.66	0.73
Sandstone	1.47	0.39	0.15	0.94	0	2.95	0.02
Igneous	0.32	0.05	0.02	0.92	0	1.31	0.01
TOTAL	2.05	1.19	1.03	4.65	0	8.92	0.76

NB - Figures contain estimates where no survey return was provided

FIGURE 2 – Crushed Rock Sales by End Use 2019



4.1 Sales of all types of crushed rock for uncoated roadstone and concrete aggregate remained relatively static during 2019.

4.2 Sale of crushed rock for coated roadstone decreased by 240,000 tonnes in 2019 compared to 2018 with the vast majority of the decrease being sandstone sales.

4.3 Use of crushed rock for fill/other construction uses declined from 4.65 million tonnes in 2018 to 4.3 million tonnes in 2019, with the vast majority of the reduction being limestone sales.

4.4 Total limestone sales reduced by 390,000 tonnes, total sandstone sales decreased by 150,000 tonnes, and total igneous sales reduced by 20,000 tonnes in 2019 compared to sales in 2018.

4.5 Fill/other constructional uses remains the primary use for crushed rock, utilising 51% of all sales (down 1% from 2018). Coated roadstone utilises 22% (down 1% from 2018), uncoated roadstone utilises 12% (down 1% from 2018) and concrete aggregate utilises 15% of all rock sales (up 3% from 2018).

Table 4
Crushed Rock Sales by Mineral Planning Authority 2017-2019 (million tonnes)

Sub-Region	Mineral Planning Authority	Crushed Rock Sales 2017		Crushed Rock Sales 2018		Crushed Rock Sales 2019	
Powys (inc Brecon Beacons)	Powys	3.04		2.91		3.04	
	Brecon Beacons NP						
South West Wales	Carmarthenshire	0.89	1.80	0.91	1.99	0.83	1.72
	Neath Port Talbot	0.25		0.39		0.35	
	Pembrokeshire	0.56		0.50		0.48	
	Pembrokeshire Coast NP						
	Ceredigion	0.10		0.19		0.06	
	Swansea	0		0		0	
South East Wales	Blaenau Gwent	0.59	3.83	0.86	4.02	0.78	3.60
	Caerphilly	0		0		0	
	Torfaen			0		0	
	Newport			0		0	
	Monmouthshire	0		0		0	
	Rhondda Cynon Taf	0.80		0.83		0.67	
	Merthyr Tydfil	2.44		2.33		2.15	
	Bridgend						
	Cardiff						
	Vale of Glamorgan						
TOTAL		8.67		8.92		8.36	

4.7 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.

4.8 Sales of crushed rock in Powys/BBNPA increased by 130,000 tonnes between 2018 and 2019 rebounding to their 2017 level.

4.9 Sales in South West Wales decreased by 270,000 tonnes between 2018 and 2019. There was a very significant decrease in sales of 130,000 tonnes in Ceredigion and an 80,000 tonnes decrease in sales in Carmarthenshire. Smaller decreases of 40,000 tonnes and 20,000 were evident in Neath Port Talbot and Pembrokeshire (inc National Park) respectively.

4.10 Sales in South East Wales decreased by 420,000 tonnes, with significant decreases of 80,000 tonnes from Blaenau Gwent/Caerphilly, 160,000 tonnes from RCT/Merthyr and 180,000 from Bridgend/Cardiff/Vale of Glamorgan.

LANDBANK

4.11 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.

4.12 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.

4.13 Dormant sites and sites where planning permission has been suspended 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.

4.14 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 31.12.2019 by Mineral Planning Authority (million tonnes) based on 3 year average sales 2017-2019**

Region	Mineral Planning Authority	Crushed Rock Reserve 31.12.2019	Average Annual Sales 2017-2019	Landbank (years) based on 3 year sales average
Powys (inc Brecon Beacons)	Powys	211.00	3.00	>50
	Brecon Beacons NP			N/A
South West Wales	Carmarthenshire	68.36	0.88	>50
	Neath Port Talbot	15.70	0.33	47
	Pembrokeshire	25.88	0.51	39
	Pembrokeshire Coast NP			N/A
	Ceredigion	6.02	0.12	50
	Swansea	0	0	0
South East Wales	Blaenau Gwent	25.07	0.74	3
	Caerphilly			43
	Torfaen	0	0	0
	Newport	0	0	0
	Monmouthshire	*	*	>50
	Rhondda Cynon Taf	63.56	0.77	11
	Merthyr Tydfil			>50
	Bridgend	98.81	2.31	>50
	Cardiff			28
	Vale of Glamorgan			35
SOUTH WALES TOTAL		*	*	

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

- Powys/BBNPA – 63% Sandstone, 20% Limestone and 17% Igneous
- South West Wales – 45% Limestone, 37% Sandstone and 18% Igneous
- South East Wales – 86% Limestone, 14% Sandstone

4.16 On the basis of the figures in Table 5, Blaenau Gwent and RCT have a landbank of less than 25 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, expressed in years, would therefore give a potentially misleading picture.

4.17 The landbank figures in Neath Port Talbot have reduced from >50 years to 47 years; the landbank in Pembrokeshire reduced from 42 years to 39 years; the landbank in Caerphilly reduced from >50 years to 43 years and the landbank in Blaenau Gwent has reduced from 5 years to 3 years. In the case of Caerphilly and Blaenau Gwent the reduction is due to a recalculation of reserves at a site. In both other cases it is primarily due to production in 2019 being higher than the production in 2016 (the year that it replaces in the 3 year average calculation).

4.18 The landbank figures in Ceredigion have increased from 38 years to 50 years; the landbank figures in Bridgend have increased from 42 years to >50 years; the landbank in Cardiff has increased from 22 years to 28 years and the landbank in the Vale of Glamorgan has increased from 25 years to 35 years. In the case of Ceredigion the increase is due to the production in 2019 being significantly lower than in 2016 (the year that it replaced in the 3-year average calculation). In the case of Bridgend it is primarily due to a recalculation of reserves at two sites. In both other cases it is a combination of the recalculation of reserves and reduced production in 2019 compared to 2016.

4.19 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 below therefore sets out the crushed rock landbank based on a ten year sales average 2010-2019.

Table 6 Crushed Rock Reserves and Landbanks at 31.12.2019 by Mineral Planning Authority (million tonnes) based on 10 year average sales 2010-2019				
Region	Mineral Planning Authority	Crushed Rock Reserve 31.12.2019	Average Annual Sales 2010-2019	Landbank (years) based on 10 year sales average
Powys (inc Brecon Beacons)	Powys	211.00	2.99	>50
	Brecon Beacons NP			N/A
South West Wales	Carmarthenshire	68.36	0.78	>50
	Neath Port Talbot	15.70	0.36	43
	Pembrokeshire	25.88	0.59	37
	Pembrokeshire Coast NP			N/A
	Ceredigion	6.02	0.15	40
	Swansea	0	0	0
South East Wales	Blaenau Gwent	25.07	0.52	3
	Caerphilly			>50
	Torfaen	0	0	0
	Newport	0	0	0
	Monmouthshire	*	*	>50
	Rhondda Cynon Taf	63.56	0.73	12
	Merthyr Tydfil			>50
	Bridgend	98.81	2.01	>50
	Cardiff			30
	Vale of Glamorgan			38
SOUTH WALES TOTAL		*	*	

4.20 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, in the past few years, the three year average sales figures are starting to exceed the ten year sales average figures in a number of Local Planning Authority areas. Powys, Blaenau Gwent, Bridgend, Caerphilly, Cardiff, Carmarthenshire, Vale of Glamorgan and RCT have three year average sales in 2019 which were higher than the ten year average sales. This trend indicates that forward planning purely on the basis of the ten year average production figure could lead to under-provision in those areas. This is an issue for the Regional Technical Statement 2nd Review.

4.21 The landbank in Neath Port Talbot increased from 41 to 43 years; Pembrokeshire from 35 to 37 years; Ceredigion from 37 to 40 years; Cardiff 27 to 30 years and in the Vale from 31 to 38 years. In the case of NPT, Pembrokeshire and the Vale this is primarily due to production in 2019 being lower than the production in 2009 (the year that it replaces in the 10 year average calculation). In the case of Cardiff it is primarily due to the recalculation of reserves at one site, and in Ceredigion it is a combination of re-evaluation of reserves and the reduction in average sales.

4.22 The landbank in Blaenau Gwent decreased from 6 to 3 years and in RCT from 14 to 12 years. In the case of RCT this is due to the sales in 2019 being higher than the sales in 2009. In the case of Blaenau Gwent it results from a review of reserves available at one site.

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

**Table 7
Crushed Rock Reserves at Dormant/Suspended Sites by Mineral Planning Authority (million tonnes)**

Region	Mineral Planning Authority	Crushed Rock Reserve 31.12.2019
Powys (inc Brecon Beacons)	Powys	0.36
	Brecon Beacons NP	
South West Wales	Carmarthenshire	11.29
	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		30.01

4.24 Table 7 above sets out the reserves of crushed rock at dormant¹ sites and sites where planning permission has been suspended. These reserves are not included within landbanks but can be used to offset against allocation requirements in an LDP provided an assessment of the likelihood of the future operation of the site concludes that it is likely to reactivate.

¹ Sites with planning permission but working cannot re-commence until full modern conditions have been approved by the local planning authority

5.0 LAND WON SAND & GRAVEL

Table 8 Land won Sand & Gravel Sales by end use 2019				
	Tonnes 2019 (000)	2019 %	Tonnes 2018 (000)	2018 %
Building/soft sand for coating for asphalt/mortar	70	41	50	42
Concreting/sharp sand	38	22	20	17
Gravel – concrete aggregate, other uses	44	25	40	33
Raised material for constructional fill/unknown	20	12	10	8
Total	172	100	120	100

FIGURE 3 – Land Won Sand and Gravel by End Use 2019

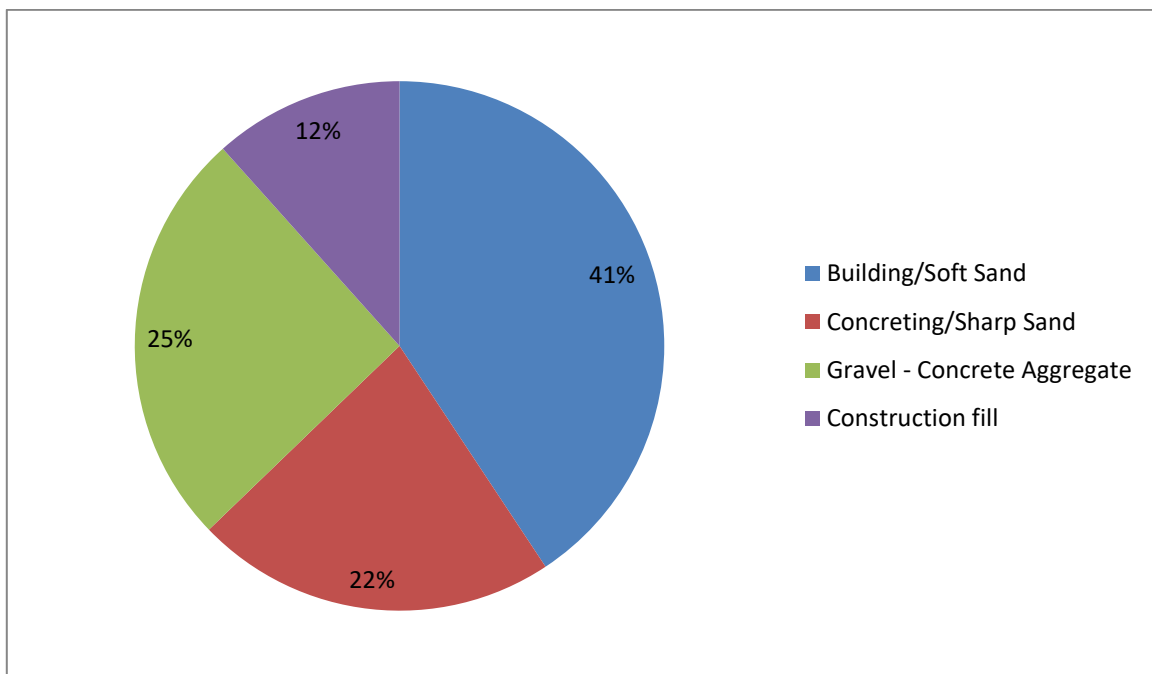


Table 9
Land Won Sand & Gravel Sales by Mineral Planning Authority (thousand tonnes)

Region	Mineral Planning Authority	Sand & Gravel Sales 2017	Sand & Gravel Sales 2018	Sand & Gravel Sales 2019
Powys (inc Brecon Beacons)	Powys	160	120	172
South West Wales	Carmarthenshire			
	Ceredigion			
	Pembrokeshire Coast NP			

5.1 Table 9 shows the Local Planning Authorities where land won sand and gravel is produced. The total sales for 2019 have increased by 52,000 tonnes from 2018, this is an increase of 30%.

LANDBANK

5.2 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 2017-2019

Region	Mineral Planning Authority	Sand & Gravel Reserve 2019	Average Annual Sales 2017-2019	Landbank (years) based on 3 year sales average
Powys (inc Brecon Beacons)	Powys	2.09	0.15	>50
South West Wales	Carmarthenshire			>50
	Ceredigion			13
	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 2010-2019

Region	Mineral Planning Authority	Sand & Gravel Reserve 2019	Average Annual Sales 2010-2019	Landbank (years) based on 10 year sales average
Powys (inc Brecon Beacons)	Powys	2.09	0.21	>50
South West Wales	Carmarthenshire			>50
	Ceredigion			6
	Pembrokeshire Coast NP			N/A

5.3 On the basis of either the 3-year or 10-year landbank calculations only Ceredigion has a landbank of less than 22 years. The RTS 1st Review suggests that the four Mineral Planning Authorities in South West Wales (Carmarthenshire, Ceredigion, Pembrokeshire and the Pembrokeshire Coast National Park Authority) 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 2019 and will continue.

5.4 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 Marine Licences (as at December 2019) exist in Welsh waters for North Middle Ground, Culver Extension (Area 526), North Bristol Deep (Area 470/1 and 470/2) and Nobel Bank (Area 472). A site with both planning permission and a Marine Licence at Bedwyn Sands, Monmouthshire also contributes towards sales data. There are also licences in English waters of the Bristol Channel. Production from Welsh licence areas may be exported to England and vice versa.

Table 12 Port Statistics for Marine Dredged Aggregate Landings				
Mineral Planning Authority	Landing Port	2017 Tonnages	2018 Tonnages	2019 Tonnages
Neath Port Talbot	Briton Ferry/Port Talbot	3,547	4,661	10,676
Carmarthenshire	Burry Port	119,760	101,989	158,449
Cardiff	Cardiff Docks	176,669	163,807	217,598
Pembrokeshire	Port of Pembroke	26,831	26,935	19,744
Newport	Newport Docks	259,285	217,928	227,688
Monmouthshire (Bedwyn Sands)	Newport	*	*	*
Swansea	Swansea Docks	81,844	62,720	27,378
Total		667,936	578,040	661,533

Source: The Crown Estate Summary of Statistics 2017, 2018 and 2019

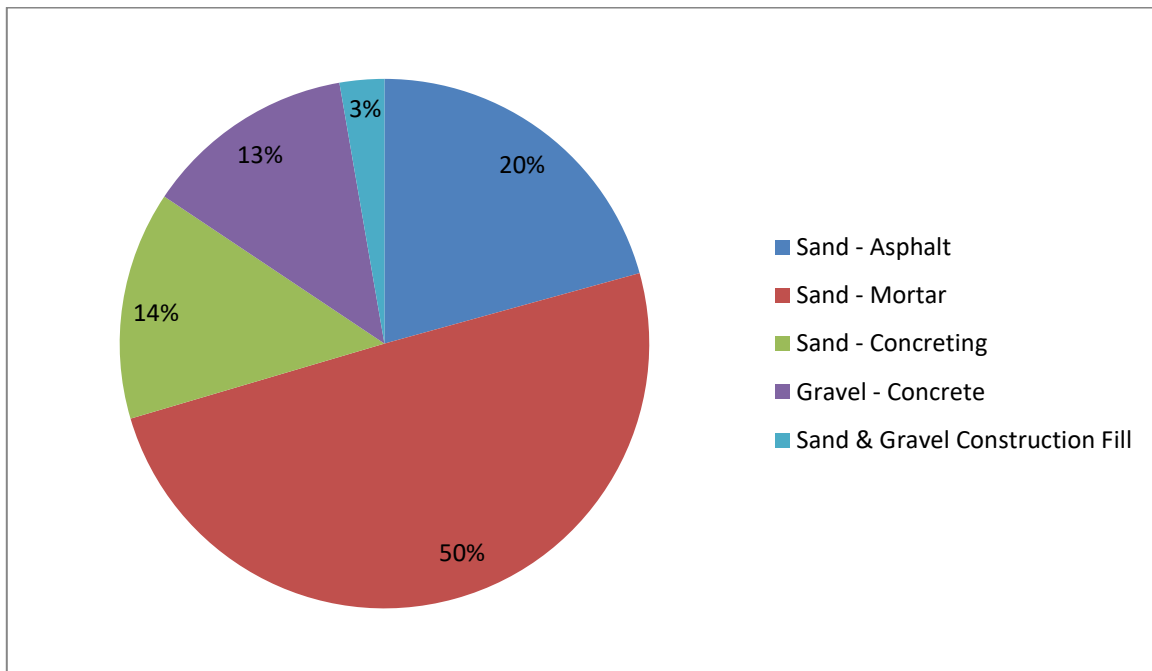
* The aggregate removed from the Bedwyn Sands in Monmouthshire is partly above low water mark and that area is therefore under the jurisdiction of the Local Planning Authority. The material is landed in Newport by a single company. The landing data for that Company is therefore confidential.

6.3 Landings of marine sand and gravel reduced markedly between 2017 and 2018 across all the major landing ports. Landings at the smaller landing ports such as Pembroke and Briton Ferry remained largely unchanged. Landings in 2019 have rebounded to 2017 levels with

Newport having seen a minor improvement and landings in Cardiff and Llanelli increased considerably.

Table 13 Marine Sand & Gravel Sales by end use 2019				
	Tonnes 2018	2018 %	Tonnes 2019	2019 %
Sand – Asphalt	180,729	25	167,370	20
Sand – Mortar	316,669	45	401,781	50
Sand – Concreting	186,986	26	112,730	14
Gravel (suitable for concrete aggregates)	1,691	<1	104,278	13
Sand & Gravel (suitable for construction fill)	27,711	4	21,999	3
Total	713,786	100	808,158	100

FIGURE 4 – Marine Sand and Gravel Sales by End Use 2019



6.4 Marine Sand and Gravel Sales in 2019 have significantly exceeded the amount of material dredged from Crown Estate licence areas. 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 increased from 714,000 tonnes in 2018 to 808,000 tonnes in 2019, an increase of 94,000 tonnes. This partially reverses the reduction of 199,000 tonnes experienced between 2017 and 2018. The use of marine sand for mortar primarily accounts for the increase.

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

7.2 The Survey response in relation to Secondary Aggregate Sales in 2019 was so poor that any analysis would be meaningless.

7.3 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 Aberthaw B.

7.4 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 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 14 below together with the sales figure for 2019. The purpose of this comparison is to assess whether there is a danger of under-provision within any Local Authority area. Sales exceeding the annualised sales figure is merely an early warning that aggregate reserves are being used more quickly than anticipated in the RTS1 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 14
Crushed Rock Sales in 2019 by Mineral Planning Authority (million tonnes) in comparison to the RTS annualised apportionment

Region	Mineral Planning Authority	Crushed Rock Sales 2019	RTS Annualised Apportionment ²
Powys (inc Brecon Beacons)	Powys	3.04	2.51
	Brecon Beacons NP		0.55
South West Wales	Carmarthenshire	0.83	1.07
	Neath Port Talbot	0.35	0.59
	Pembrokeshire	0.48	0.55
	Pembrokeshire Coast NP		0.29
	Ceredigion	0.06	0.20
	Swansea	0	0
South East Wales	Blaenau Gwent	0.78	0.17
	Caerphilly		0.76
	Torfaen	0	0
	Newport	0	0
	Monmouthshire	0	0.12
	Rhondda Cynon Taf	0.67	0.69
	Merthyr Tydfil		0.27
	Bridgend	2.15	0.75
	Cardiff		0.86
	Vale of Glamorgan		1.09
SOUTH WALES TOTAL		8.36	10.47

9.6 Sales in 2019 for Bridgend and Powys 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.

² The annualised apportionment is based on a 10-year sales average.

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.
- A planning permission at Forest Wood Quarry (in the Vale of Glamorgan) released additional reserve at Forest Wood Quarry (RCT area) and a preferred area allocation at Craig-yr-hesg in the Local Development Plan is the subject of a planning application.
- Allocations have been made by Blaenau Gwent 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 15 together with the sales figure for 2019.

Table 15 Sand and Gravel Sales in 2019 by Mineral Planning Authority (million tonnes) in comparison to the RTS annualised apportionment			
Region	Mineral Planning Authority	Sand & Gravel Sales 2019	RTS Annualised Apportionment³
South West Wales	Carmarthenshire	0.17	0.33
	Pembrokeshire		
	Pembrokeshire Coast NP		
	Ceredigion		
SOUTH WALES TOTAL		0.17	0.33

³ The annualised apportionment is based on a 10-year sales average

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.

9.11 A Consultation Draft of the RTS 2nd Review was published in 2019. It is anticipated that the final document will be published in 2020.

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

A465 Heads of the Valleys Road dualling

Cardiff Eastern Bay Link Road

Cardiff Capital Region Metro Project

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

Northern Access Road (St Athan Enterprise Road) - Under Construction

M4 Junction 34 link to A48 - WelTag Study on-going

Cardiff Airport and St Athan Enterprise Zone

Land at Upper Cosmeston Farm, Lavernock - 576 units

Land West of Swanbridge Road, Sully - 500 units

Swansea City Centre and Fabian Way Redevelopment

Student Accommodation and Office Developments in Cardiff

Major Housing Developments (approx. 14,000 houses) in Cardiff

A40 Llanddewi Velfrey to Penblewin Road Improvements

Flood defence works on Pengam Foreshore, Cardiff

Global Centre for Rail Excellence, Onllwyn (Powys / Neath Port Talbot)

Coed Darcy (approx. 2,000 houses + commercial development), Llandarcy

11. MONITORING OF PLANNING APPLICATIONS

Planning Applications and Decisions in 2019							
Planning Reference	Site Name	Type	Mineral	Reserve	Date Submitted	Decision	Decision Date
03/P/09336	Tirpentwys (Torfaen)	Tip	Sandstone	4.75 Mt	10.11.03	Refused Appeal Dismissed	26.04.17 29.08.19
15/0666/10	Craig yr Hesg, Pontypridd, (Rhondda Cynon Taf)	Ext	Sandstone	10 Mt	15.05.15		
16/0016/NCC	Hafod Fach	Ext of Time		Nil	08.01.16	Refused Appeal Allowed	07.11.18 04.07.19
19/17586/FUL	Penderyn Quarry (BBNPA)	Reserve Swap	Limestone	- 7.4 Mt	27.06.19	Pending	
S/38652	Pennant Quarry (Carmarthenshire)	Ext of Time	Sandstone	Nil	02.04.19	Pending	
18/1228/MN	Slade Hall (Pembrokeshire)	Ext	Shale	600,000	18.03.19	Pending	
19/0710/MN	Keeston Borrow Pit (Pembrokeshire)	New Site	Shale	29,000	17.10.19	Pending	
P2019/5299	Gilfach Quarry (NPT)	Ext	Sandstone	1.5 Mt	28.08.19	Pending	
P2019/5300	Gilfach Quarry (NPT)	Ext of Time	Sandstone	Nil	28.08.19	Pending	
P2019/5301	Gilfach Quarry (NPT)	Ext of Time	Sandstone	Nil	28.09.19	Pending	
19/0845/FUL	Tregunter Farm	New Site	Sand & Gravel	500,000	20.09.19	Pending	

12. MONITORING REVIEWS OF MINERAL PERMISSIONS

ROMP Applications in 2019							
Planning Reference	Site Name	Type	Mineral	Reserve (mt)	EIA	Date Submitted	Decision Date
11/06445	Penderyn Quarry (BBNPA)	Periodic	Limestone	26.3	Yes	24 March 2011	
NP/12/0601	Carew Quarry (PCNPA)	Periodic	Limestone	3.7	Yes	13 December 2012	19 June 2019
P/2013/0642	Caerfagu Quarry (Powys)	Periodic	Sand & Gravel	0.1	Yes	20 June 2013	Suspended
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
	Vaynor (shared with Merthyr Tydfil)	Limestone	31 May 2097	31 Dec 2020
	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	31 Dec 2027	N/A
	Bryn	Sandstone	31 Dec 2022	N/A
	Cefn Onn	Limestone	21 Feb 2042	Dormant
Cardiff	Creigiau	Limestone	21 Feb 2047	21 Dec 2033
	Taffs Well	Limestone	31 Dec 2027	31 Dec 2022
	Ton Mawr	Limestone	31 Dec 2022	31 Dec 2022
	Blaengwynlais (shared with Caerphilly)	Limestone	21 Feb 2042	16 Oct 2029
	Cefn Garw	Limestone	21 Feb 2042	N/A
Carmarthenshire	Alltygarn	Sandstone	21 Feb 2042	06 Mar 2032
	Blaenyfan	Limestone	21 Feb 2042	04 Oct 2031
	Coygen	Limestone	21 Feb 2042	07 Feb 2033
	Maesdulais	Limestone	21 Feb 2042	13 Mar 2032
	Crwbin	Limestone	21 Feb 2042	01 Sep 2032
	Garn Wen	Igneous	21 Feb 2042	01 Feb 2024
	Garn Bica	Limestone	21 Feb 2042	16 Apr 2024
	Torcoed	Limestone	31 Dec 2055	01 Sep 2032
	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
	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	N/A
	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	31 Dec 2020
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	28 Feb 2042	19 Jun 2034
	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 2020	N/A
	Cronllwyn	Slate Waste	3 Nov 2019	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	31 Dec 2111	17 Apr 2033
	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 31.12.19)

Mineral Planning Authority	LDP Adoption	LDP Review Position
Pembrokeshire Coast National Park	LDP Adopted in September 2010	LDP has been through Examination. Due to publish MACs for consultation for 8 weeks from January 16th 2020.
Caerphilly	LDP adopted in November 2010	Plan expires 2021. The Council has authorized the review to commence
Rhondda Cynon Taf	LDP Adopted in March 2011.	Plan expires 2021. Currently progressing a review.
Merthyr Tydfil	LDP Adopted in May 2011.	Replacement LDP to be adopted in January 2020
Blaenau Gwent	LDP Adopted in November 2012	Plan expires 2021. Review Report published in Autumn 2017. Delivery Agreement for the revised LDP (2018-2033) agreed by Welsh Government on 19th September 2018.
Pembrokeshire	LDP Adopted in February 2013	Plan expires 31 st December 2021. Review commenced May 2017.
Ceredigion	LDP Adopted April 2013	Plan currently expires 2022. Review Report published November 2017. Delivery Agreement consultation undertaken
Bridgend	LDP Adopted September 2013	Plan expires 2021. Review has commenced.
Torfaen	LDP Adopted in December 2013	Plan expires 2021. Work has commenced on review
Brecon Beacons National Park	LDP Adopted in December 2013	Plan expires 2022. Review commenced December 2017.
Monmouthshire	LDP Adopted in February 2014	Plan expires 2021. Review Report published in March 2018. Preparation on replacement LDP 2018-2033 has commenced.
Carmarthenshire	LDP Adopted in December 2014	Plan expires 2021. Work has commenced on LDP Review.
Newport	LDP Adopted in January 2015	Plan expires 2026. 4th AMR published October 2019.
Cardiff	LDP adopted in January 2016	Plan expires 2026. 3rd AMR published October 2019. LDP Review due to commence May 2021.
Neath Port Talbot	LDP adopted in January 2016	Plan expires 2026. 3rd AMR published in October 2019
Vale of Glamorgan	LDP adopted in June 2017.	Plan Expires in 2026. 1st AMR data collected from April 1st 2018 to March 31st 2019. AMR published in October 2019. The LDP Review is planned for 2021.
Powys	LDP adopted in April 2018	Subject to monitoring work on a full replacement LDP is due to commence by April 2022
Swansea	LDP adopted February 2019	Plan expires 2025

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)
Regional Minerals & Waste Planning Manager
Carmarthenshire County Council

Steve Smith
Development Services Manager
Blaenau Gwent County Borough Council
(Represented by Justin Waite)

John Cook
Chief Executive/National Park Officer
Brecon Beacons National Park
(Represented by Donna Bowhay)

Jonathan Parsons
Head of Planning
Bridgend County Borough Council
(Represented by Richard Matthams)

Rhian Kyte
Head of Planning and Regeneration
Caerphilly County Borough Council
(Represented by Ian Mullis)

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

Russell Hughes-Pickering
Corporate Lead Officer Economy and Regeneration
Ceredigion County Council
(Represented by Sarah Groves-Phillips)

Judith Jones
Head of Town Planning
Merthyr Tydfil County Borough Council
(Represented by Craig Watkins)

Mark Hand
Head of Placemaking, Housing, Highways and Flooding
Monmouthshire County Council
(Represented by Susan Hall)

Ceri Morris

Head of Planning and Public Protection
Neath Port Talbot County Borough Council
(Represented by 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)

Nicola Gandy

Director of Park Direction & Planning
Pembrokeshire Coast National Park
(Represented by Gayle Lister)

Gwilym Davies

Head of Public Protection, Planning and Property
Powys County Council
(Represented by Peter Morris)

Simon Gale

Director of Prosperity and Development
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 Neighbourhoods, Planning & Public Protection Service
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

Andy Cadell

Representative MPA –Tarmac
Mineral Products Association

Mike McGee

Representative MPA - Cardigan Sand and Gravel
Mineral Products Association

Peter Huxtable

British Aggregates Association

Joanne Smith

Welsh Government
Planning Division

Vacant

Welsh Government
Dept. for Economy, Science and Transport

Peter Jordan

Natural Resources Wales

M Wrigley/N Everington

The Crown Estate

Vacant

British Geological Survey

Vacant

Recycling Industry

Vacant

RWE npower

APPENDIX B

Sites Included In 2019 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 National Park	Ammanford	Limestone	Messrs Williams & Griffiths	Active
	Penderyn	Limestone	Hanson UK	Active
	Llanfair	Sandstone	Glanusk Estate	Dormant
	Cefn Cadlan	Sandstone	Tredegar 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	Tarmac	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	Inactive
	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	Blaenyfan	Limestone	Cemex UK Ltd	Active
	Coygen	Limestone	GD Harries	Active
	Torcoed/Crwbin	Limestone	Tarmac	Active
	Garn Bica	Limestone	M Jones	Active
	Limestone Hill	Limestone	D Williams	Dormant
	Llwynyfran	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
	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
Foelfach	Gritstone	P. O'Keefe	Active	

Carmarthenshire (Cont.)	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	Inactive
	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	Active
	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
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
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
	Cronllwyn	Slate/Secondary	E Evans	Inactive

	Rushacre Farm	Shale	G. James	Active
	Cribarth	Sandstone	Aggregate Industries Ltd	Inactive
Powys	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	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
	Aberthaw Power Station	PFA/FBA/Secondary	RWE npower	Active
Beaupre	Limestone	Unknown	Dormant	

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

Browns Waste Management and Recycling Ltd, Llangennech, 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

Julian Mousley & Sons, Cerrig-yr-wyn Quarry, Llangynog, Carmarthen

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

Wesley Rees, Glyngwernen Quarry, Felinfoel, Llanelli

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

Green Cycle, Langcross Farm, Pen-y-Turnpike Road, Dinas Powys, Cardiff, CF64 4HG

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

SWRAWP Annual Report 2016

SWRAWP Annual Report 2017

SWRAWP Annual Report 2018