

18 July 2013**Agenda Item: 7****REPORT OF THE CORPORATE DIRECTOR FOR POLICY, PLANNING AND
CORPORATE SERVICES****NOTTINGHAMSHIRE LOCAL AGGREGATES ASSESSMENT - 2013****Purpose of the Report**

1. To approve the Nottinghamshire Local Aggregates Assessment (2013).

Information and Advice

2. Aggregate minerals (such as sand and gravel and hard rock) make an essential contribution to national prosperity and quality of life. They help to underpin the construction industry and provide the critical raw materials for built development, other construction, manufacturing and the maintenance of infrastructure. Aggregates are usually defined as hard granular materials which may be comprised of primary (extracted from the land or the sea) or recycled materials.
3. The National Planning Policy Framework (NPPF) introduced the requirement for Mineral Planning Authorities to undertake a Local Aggregates Assessment (LAA) which states that:

“Minerals planning authorities should plan for a steady and adequate supply of aggregates by preparing an annual Local Aggregate Assessment, either individually or jointly by agreement with another or other mineral planning authorities, based on a rolling average of 10 years sales data”.
4. Following the publication of the NPPF, the Government issued further guidance on the Managed Aggregate Supply System (MASS) in October 2012. This sets out that the LAA should cover an assessment of:
 - Recycled aggregate;
 - Secondary aggregate;
 - Imported aggregate; and
 - Land-won aggregate.
5. The guidance also stated that the LAA should cover the issues set out below, which the County Council consider have been included within the LAA:

- A forecast of the demand for aggregates based on the average of 10-years sales data and other relevant local information;
 - An analysis of all aggregate supply options, as indicated by landbanks, mineral plan allocations and capacity data. This analysis should be informed by planning information, the aggregate industry and other bodies; and
 - An assessment of the balance between demand and supply, and the economic and environmental opportunities and constraints that might influence the situation. It should conclude if there is a shortage or a surplus of supply and, if the former, how this is being addressed.
6. The Nottinghamshire LAA identifies the current and future situation within Nottinghamshire with respect to all aspects of aggregate supply and takes into account other local considerations. The Nottinghamshire LAA covers the following areas:
- Aggregates in Nottinghamshire;
 - Local production;
 - Future aggregate provision;
 - Future growth; and
 - Conclusions
7. The Nottinghamshire LAA is attached in Appendix 1.
8. The MASS guidance indicates that all LAAs should be submitted for consideration and scrutiny to the relevant aggregate working party. The aggregate working parties should provide technical advice on the adequacy of each local aggregate assessment. Nottinghamshire County Council consulted with the East Midlands Aggregates Working Party (EMAWP) and other neighbouring Mineral Planning Authorities on an initial draft of the LAA in November 2012. Responses were received from a number of neighbouring authorities and the EMAWP which included some suggested modifications which have now been incorporated into the final document.
9. The LAA concludes that the provision of Sand and Gravel is the biggest issue for Nottinghamshire and over the plan period resource depletion in the Idle Valley is likely to be the biggest factor potentially influencing exports to South Yorkshire. The extent of the impact will depend on the level of demand (due to the economic conditions) over the plan period, but it is likely that sand and gravel will either be sourced from quarries around Newark or from other markets outside of Nottinghamshire to meet demand which could affect the amount of mineral being provided.
10. It also concludes that Sherwood Sandstone production is much lower than sand and gravel and over the plan period no specific issues have been identified. Limestone production is very low due to the limited reserves and few issues have been raised.
11. Based on the available information set out in the LAA it is considered that the apportionment figures developed using the 10 year average sales methodology are accurate and that there will be no significant increase in economic activity or development to warrant an increase in the level of provision.
12. The Nottinghamshire LAA will be monitored annually alongside the annual monitoring of the Minerals Local Plan (when adopted). The monitoring of the levels of demand from significant

new infrastructure projects will also be key and will be undertaken through the annual review of the LAA. This will ensure that there is an adequate and steady supply of aggregate minerals provided over the plan period and that any fluctuations in future requirements can be addressed.

Other Options Considered

13. The only other option would be not to approve the Local Aggregates Assessment but the production of this document is a Government requirement as set out in the National Planning Policy Framework (NPPF) and Managed Aggregate Supply System (MASS) guidance.

Reason/s for Recommendation/s

14. To agree the 2013 Nottinghamshire Local Aggregates Assessment. Production of Minerals Local Plans and associated documents is a statutory requirement.

Statutory and Policy Implications

15. This report has been compiled after consideration of implications in respect of finance, the public sector equality duty, human resources, crime and disorder, human rights, the safeguarding of children, sustainability and the environment and those using the service and where such implications are material they are described below. Appropriate consultation has been undertaken and advice sought on these issues as required.

Financial Implications

16. There are no direct financial implications arising from the contents of this report.

Implications for Sustainability and the Environment

17. The production of Minerals Local Plans and associated documents is a statutory requirement.

RECOMMENDATION/S

- 1) That Committee approve the 2013 Local Aggregates Assessment attached as an appendix to the report.

Jayne Francis-Ward
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For any enquiries about this report please contact: Lisa Bell, Planning Policy Team Manager, ext 74547

Constitutional Comments (NAB 24.06.13)

18. Environment and Sustainability Committee has authority to approve the recommendation set out in this report by virtue of its terms of reference.

Financial Comments (SEM 24/06/13)

19. There are no specific financial implications arising directly from this report.

Background Papers and Published Documents

Except for previously published documents, which will be available elsewhere, the documents listed here will be available for inspection in accordance with Section 100D of the Local Government Act 1972.

Electoral Division(s) and Member(s) Affected

All

Nottinghamshire Minerals Local Plan

Local Aggregates Assessment

July 2013



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Summary

This is the first Nottinghamshire Local Aggregates Assessment (LAA) to be produced under the requirements set out in the National Planning Policy Framework. The assessment covers Nottinghamshire (excluding Nottingham City) and will set apportionment figures for aggregate minerals for inclusion in the Nottinghamshire Minerals Local Plan.

Aggregate minerals are made up of sand and gravel, Sherwood Sandstone and limestone and are used in the construction industry. Their main uses include concrete, mortar, asphalt, railway ballast and bulk fill.

The LAA sets out:

- Summaries of past aggregate production, number of active quarries and the distribution of the extracted mineral.
- Future apportionment levels based on the NPPF 10 year average figure and comparison to past apportionment figures.
- The key issues that could affect the future demand for aggregates over the next plan period.

Key Findings

Nottinghamshire is an important producer of sand and gravel and Sherwood Sandstone and has a large export market particularly to South Yorkshire and the wider East Midlands. Limestone production is limited with most imported from Derbyshire and Leicestershire.

The recession has seen output for all aggregate minerals fall significantly since 2007. This can be seen most dramatically with sand and gravel as output in 2010 fell to its lowest level since records began in 1974.

The 2009 draft apportionment figures agreed by the Regional Aggregate Working Party are no longer considered accurate as they were only based on a period of economic growth. The NPPF 10 year average production methodology will therefore be used as this takes into account a period of growth and recession.

Based on current evidence it is not considered that there will be a sufficient increase in demand from major infrastructure projects to set apportionment figures above the NPPF methodology. Sand and gravel output from the Idle Valley could also fall over the plan period due to resource depletion influencing the amount of mineral that can be exported to South Yorkshire. Ongoing monitoring will be undertaken to ensure that this remains correct over the plan period.

Introduction

- 1.1 The requirement to prepare a Local Aggregates Assessment (LAA) was introduced through the publication of the National Planning Policy Framework in March 2012. The purpose of the LAA is to enable Minerals Planning Authorities to provide a steady and adequate supply by identifying local apportionments for all aggregate minerals in their area. These apportionment figures should be based on the last 10 years average production figures taking into account national and sub national guidelines on provision and any important local considerations.

More detailed guidance on LAAs was published by the Department for Communities and Local Government (DCLG) in October 2012 and adds the requirement to produce a 3 year average production figure in order to monitor future demand.

- 1.2 This LAA sets out the aggregate minerals found in Nottinghamshire, the current situation in terms of annual output, number of active quarries and the amount of aggregate that will need to be provided over the plan period.
- 1.3 The draft LAA was submitted to the East Midlands Aggregate Working Party for consideration in November 2011. The feedback from the working party has been incorporated in to this version.
- 1.4 The Aggregates Working Party is made up of MPAs from across the region and industry representatives. Its role is to provide technical advice about the supply and demand for aggregates and undertake annual monitoring of aggregate production and levels of permitted reserves across the East Midlands. This information is supplied to MPAs and to the National Aggregate Co-ordinating group to inform national aggregate provision.
- 1.5 The latest survey information is from 2011, and it is these figures that the LAA is based on.
- 1.6 The LAA is required to be updated on an annual basis, and will enable the MPA to monitor on going patterns and trends in aggregate production and ensure that adequate reserves are maintained over the plan period.
- 1.7 Background papers focusing on each aggregate mineral as well as all other minerals have been produced to support the Minerals Local Plan:

Background papers – specific minerals

- Aggregates - sand and gravel, options for meeting shortfalls
- Aggregates - Sherwood Sandstone, options for meeting shortfalls
- Aggregates – Limestone (crushed rock), options for future provision
- Alternative aggregates
- Brick clay

- Gypsum
- Building stone
- Industrial dolomite
- Silica sand
- Coal
- Hydrocarbons – oil and gas

Background papers – other issues

- Minerals safeguarding
- Biodiversity
- Landscape character
- Archaeology
- Development management policies

Other technical reports

- Sustainability Appraisal – scoping report
- Strategic Flood Risk Assessment
- Habitats Regulations Assessment

All of the above documents are available on our website:
www.nottinghamshire.gov.uk/minerals

Aggregates in Nottinghamshire

- 2.1 Aggregates account for around 90% of minerals used in construction and are essential in maintaining the physical framework of buildings and infrastructure on which our society depends. Aggregates are usually defined as hard granular materials and include sand and gravel, Sherwood Sandstone and limestone. Their main uses include concrete, mortar, roadstone, asphalt, railway ballast, drainage courses and bulk fill.

Primary aggregates

- 2.2 Nottinghamshire's geology gives rise to the following primary aggregate minerals, as illustrated in Plan 1.

Sand and gravel

- 2.3 Important alluvial (river) sand and gravel deposits are found in the Trent and the Idle Valleys which have made Nottinghamshire the largest sand and gravel producing area in the East Midlands. Limited extraction also occurs in glaciofluvial sand and gravel deposits near East Leake, south of Nottingham. Sand and gravel is mainly used in ready mixed concrete production, although Nottinghamshire's reserves are particularly valuable because they meet high strength concrete specifications as the gravel is made up of quartzite.

Sherwood Sandstone

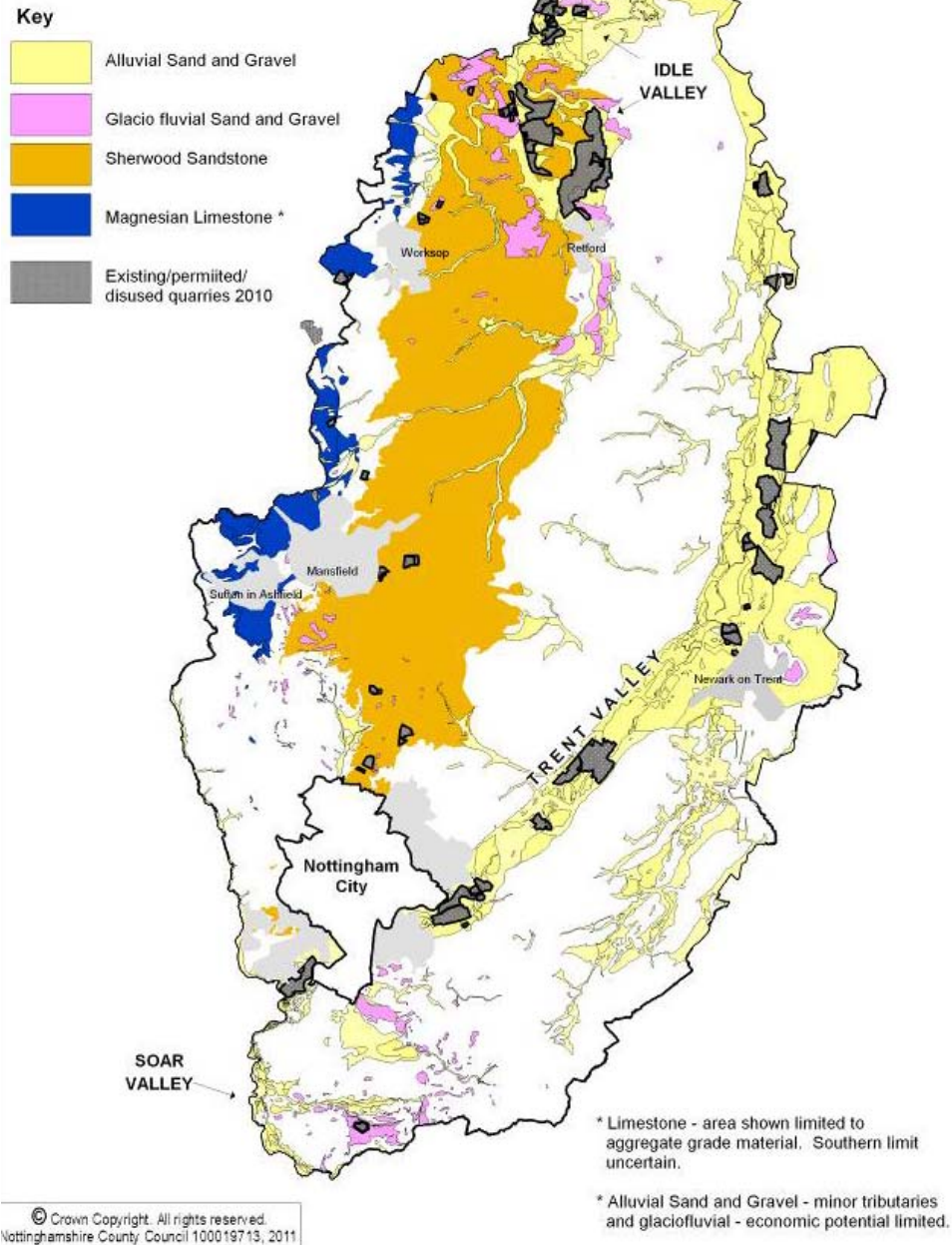
- 2.4 Although defined as sandstone, this rock formation rapidly breaks down to sand when extracted. The Sandstone occurs as a broad north-south belt stretching from the border with South Yorkshire, southwards to Nottingham. The mineral is mainly used to produce asphaltting and mortar sand. There is relatively little overlap with the uses that the alluvial and glacial sand and gravels are put to. The Sherwood Sandstone is also used for non-aggregate industrial and other specialist end-uses, the future requirements of which are considered in the background paper on Sherwood Sandstone.

Magnesian Limestone

- 2.5 This resource occurs as a relatively narrow belt to the west of the Sherwood Sandstone. This outcrop comprises the southernmost limits of the UK's second largest limestone resource that extends from the Durham coast through Yorkshire into Derbyshire and Nottinghamshire. Limestone suitable for use as an aggregate is only found in the Mansfield area and to the north where the mineral is used mainly as a road sub-base material although some mineral is of industrial grade quality. Production is relatively small scale and the lowest in the East Midlands. Around Linby the limestone is suitable for building and ornamental purposes, although aggregates can be produced as a by-product of utilising reject building stone. The future requirements and issues for building and industrial limestone are considered in the background paper on Limestone.

Figure 1: Location of aggregate minerals in Nottinghamshire

**Plan 1 - Nottinghamshire -
Primary Aggregate Resources**



Alternative aggregates

- 2.6 Alternative aggregates comprise secondary and recycled materials, although these terms are often used interchangeably. Recycled aggregates are materials that have been used previously and include construction and demolition waste, asphalt road planings and used railway ballast. Secondary aggregates are by-products of other processes that have not been previously used as aggregates. They include colliery spoil, china clay

waste, slate waste, power station ashes, blast furnace and steel slag, incinerator ashes and foundry sands.

- 2.7 Alternative aggregates are currently most widely used in lower grade applications such as bulk fill. However, the range of uses is widening due to advances in technology and the increasing economic incentive to use them instead of primary aggregates.
- 2.8 In Nottinghamshire, sources of alternative aggregates include construction and demolition waste, power station ash, river dredgings, road planings and rail ballast.

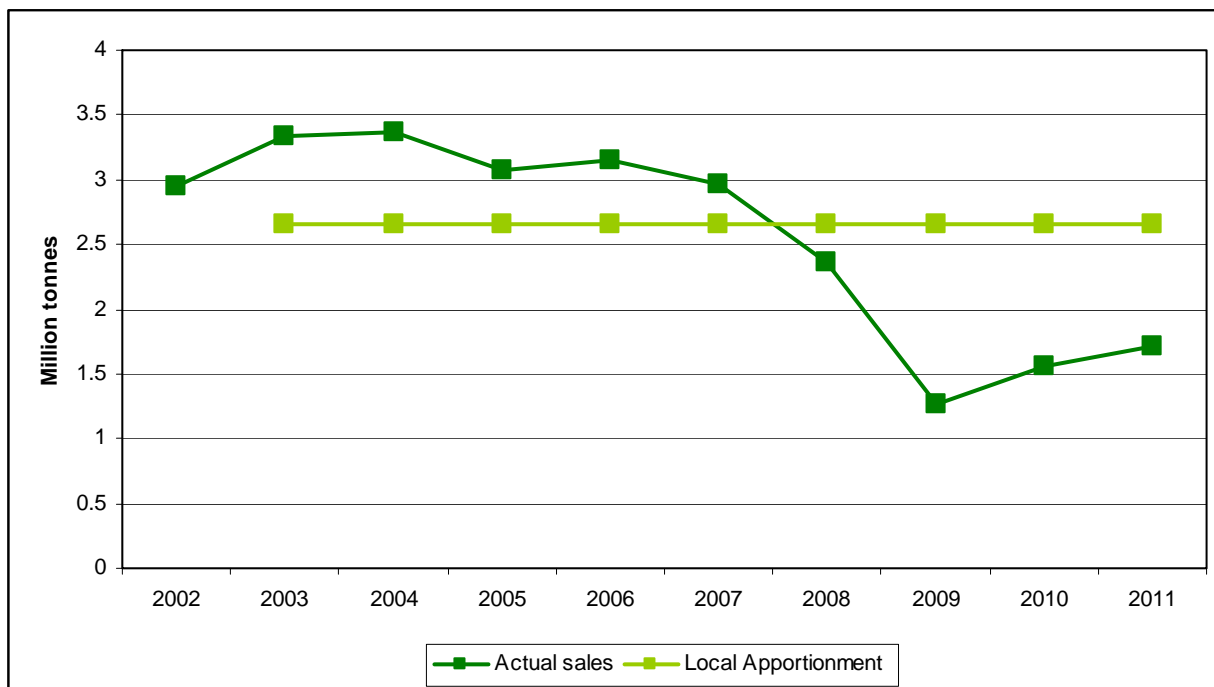
Deposit	Principle use	Occurrence	Market
Sand and gravel	Ready mixed concrete/ High strength concrete	Trent Valley & Idle Valley	South Yorkshire, East Midlands & Nottinghamshire market
Sherwood Sandstone	Asphalting sand, mortar sand and other specialist industrial uses	A broad north-south belt from South Yorkshire border to Nottingham	As above
Limestone	Mainly used for road sub-base.	Aggregate limestone is found in the Mansfield area and to in the north west of the county	Nottinghamshire. Majority of limestone imported into the county.

Local production

Sand and gravel

- 3.1 From 2001, production increased steadily to a high of 3.37 million tonnes in 2004, well above the current apportionment of 2.65 million tonnes, before declining slightly over the following years. Production fell sharply from 2007 onwards (in line with the national output) to just 1.27 million tonnes in 2009. This was a result of both the recession and production at Finningley quarry temporarily moving across the county boundary into Doncaster. Extraction in Nottinghamshire restarted at Finningley quarry in 2010 but the total countywide output only increased to 1.59 million tonnes representing the lowest production figure since records began in 1973. Production in 2011 increased slightly to 1.71 million tonnes. See Figure 2 below.

Figure 2: Recent sand and gravel production, 2001-2011 (million tonnes)



Year	2002	2003	2004	2005	2006	2007	2008	2009	2010	2011
Production (Million tonnes)	2.95	3.34	3.37	3.08	3.15	2.97	2.37	1.27	1.56	1.71

Resources and landbank

- 3.2 There are 12 permitted sand and gravel sites although at present only 9 are being worked. A combination of falling sales and new reserves being permitted in recent years has increased the landbank above the minimum 7 year minimum after it fell to 5.5 years in 2007. As of December 2011 the landbank stood at 7.3 years equal to 19.3 million tonnes

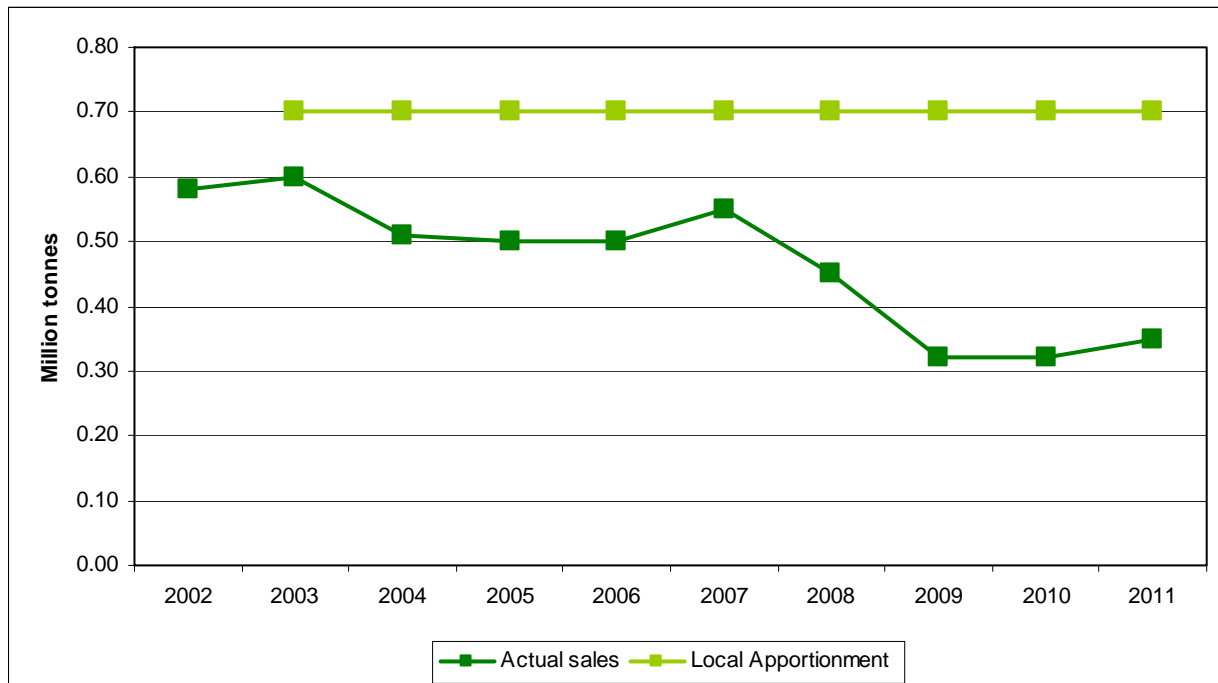
Table 1: Permitted sand and gravel quarries in Nottinghamshire

Site	Operator	Status
Langford Lowfields	Tarmac	Active
Girton	Tarmac	Active
Besthorpe	Lafarge	Active
Sturton Le Steeple	Lafarge	Yet to be worked
East Leake	CEMEX	Active
Cromwell	CEMEX	Yet to be worked
Misson West	Hanson	Active
Misson Newington	Hanson	Active
Scrooby	Rotherham Sand & Gravel	Active
Mattersey	Rotherham Sand & Gravel	Dormant
Finningley	Lafarge	Active
Misson Bawtry Road	Rowley	Active

Sherwood Sandstone

- 3.3 Historically Sherwood Sandstone production has been much lower than sand and gravel production as it is generally used in different, more specialist markets. Production has slowly declined since the mid 1990s. Between 2001 and 2007 it remained relatively stable at around 0.5-0.6 million tonnes although still below the apportionment figure of 0.7 million tonnes. As with sand and gravel, output fell significantly from 2008 onwards to record lows of just 0.32mt in 2009 and 2010 as a result of the recession. Output increased slightly in 2011 to 0.35mt. See Figure 3 below.

Figure 3: Recent Sherwood Sandstone production, 2001-2011 (million tonnes)



Year	2002	2003	2004	2005	2006	2007	2008	2009	2010	2011
Production (million tonnes)	0.58	0.60	0.51	0.50	0.50	0.55	0.45	0.32	0.32	0.35

Resources and landbank

- 3.4 There are seven permitted Sherwood Sandstone quarries (Table 2) although at present only six are being worked. The Sherwood Sandstone landbank has remained well above the seven year minimum standing at 9.8 years as of December 2011 equating to 6.8 million tonnes.

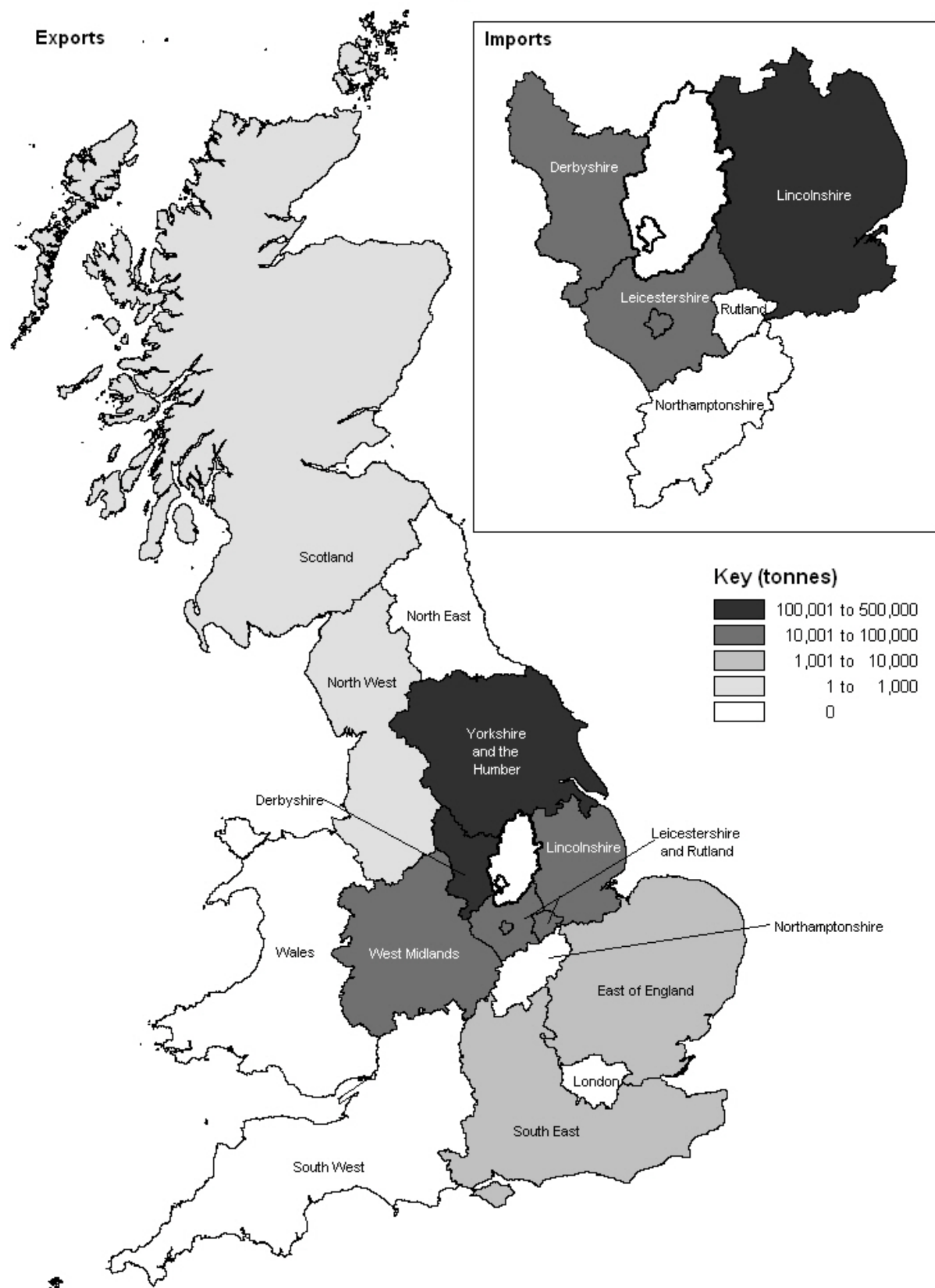
Table 2: Permitted Sherwood Sandstone quarries in Nottinghamshire

Site	Operator	Status
Burntstump	Tarmac	Active
Bestwood 2	Tarmac	Active
Carlton Forest	Tarmac	Active
Ratcherhill	Mansfield Sand Company	Active
Rufford	Welbeck Estates	Active
Scrooby Top	Rotherham Sand & Gravel	Active
Serlby	Rotherham Sand & Gravel	Dormant

Imports and exports of sand and gravel (including Sherwood Sandstone)

- 3.5 Imports and exports of aggregates are only recorded in the full surveys undertaken by the East Midlands Aggregate Working Party (EMAWP), with the last full survey being 2009. This survey does not include a breakdown for Sherwood Sandstone, hence all sand and gravel import and export figures in this report include Sherwood Sandstone.
- 3.6 Our imports of sand and gravel (including Sherwood Sandstone) from the East Midlands are very small in comparison to the amount extracted from our own quarries (250,000 tonnes compared to 1.60 million tonnes in 2009). It is likely that these imports supply markets close to the county boundary.
- 3.7 In 2009 52% of the sand and gravel (including Sherwood Sandstone) extracted in Nottinghamshire was exported out of the county (comprising of 22% to the East Midlands and 30% elsewhere). This is in part due to the high strength quartzite gravel that meets the specifications for making high strength concrete. The main export markets are South Yorkshire and neighbouring authorities in the East Midlands although some is transported a much greater distance.

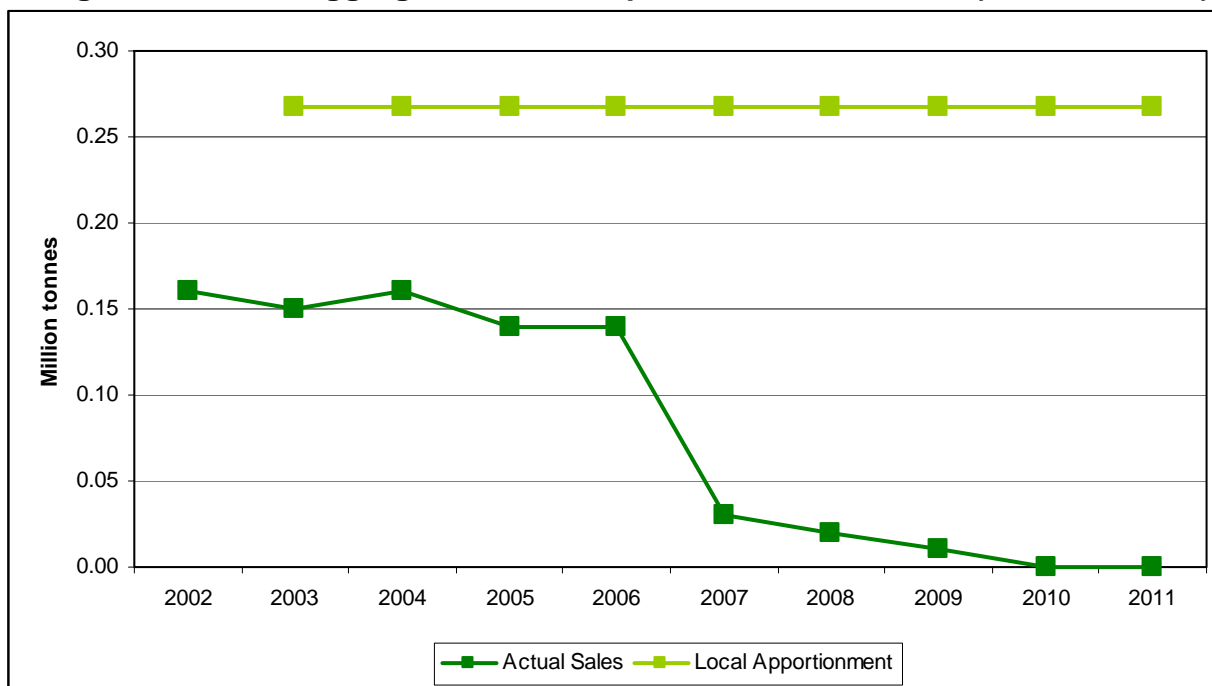
Figure 4: Sand and gravel (including Sherwood Sandstone) imports and exports, 2009 (tonnes)



Aggregate Limestone

- 3.8 Limestone production in Nottinghamshire has been low by regional standards. Production over the last 10 years has been well below the apportionment figure of 0.26. Up to 2006 production remained stable around 0.15 million tonnes before significantly falling from 2007 onwards. In 2010 and 2011 zero output was recorded. See figure 5 below.

Figure 5: Recent aggregate limestone production, 2001-2011 (million tonnes)



Year	2002	2003	2004	2005	2006	2007	2008	2009	2010	2011
Production (million tonnes)	0.16	0.15	0.16	0.14	0.14	0.03	0.02	0.01	0.0	0.0

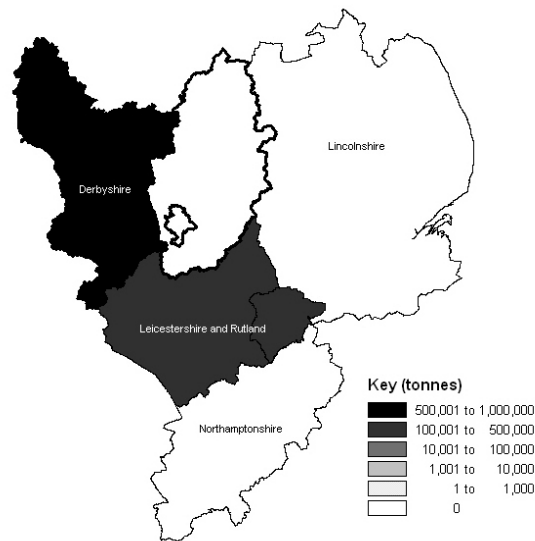
Resources and landbank

- 3.9 Nottinghamshire only has one dedicated aggregate limestone quarry (at Nether Langwith) and is only worked seasonally as it serves as a satellite to a much larger quarry in Derbyshire. Some aggregate is also produced from reject stone at a building stone quarry although this tonnage is small. As of December 2011 the landbank stood at nearly 13 years, above the minimum of 10 years however if this was based on actual production the landbank would be significantly higher.

Imports and exports of aggregate limestone

- 3.10 Limestone resources in Nottinghamshire are relatively limited therefore the majority of limestone used is imported from Derbyshire and Leicestershire (see Figure 6). No mineral was exported at the time of the 2009 EMAWP survey.

Figure 6: Aggregate limestone imports, 2009 (tonnes)



Alternative aggregates

- 3.11 Production figures for alternative aggregates are limited to national estimates. Since 1980 there has been a significant increase in annual alternative aggregate production in Great Britain, rising from 20 million tonnes to 71 million tonnes by 2007. It is estimated that alternative aggregates currently make up around 25% of aggregate use. This proportion is three times higher than the European average. Current forecasts for the East Midlands suggest an annual production of 6.8 million tonnes per annum up to 2020.
- 3.12 Local data for alternative aggregates is very limited however the main types of alternative aggregates in Nottinghamshire are set out below:

Power station ash

- 3.13 Nottinghamshire has three power stations which produce furnace bottom ash and pulverised fuel ash. In total around 1.7 million tonnes of ash is produced each year. The main use is in the production of building blocks, cement or as a secondary aggregate.

Construction and demolition waste

- 3.14 National estimates suggest that around 80-90% of construction and demolition waste is re-used or recycled, a large proportion of which usually occurs on site within the same development using mobile processing plants.
- 3.15 There are no local figures but estimates suggest that around 1 million tonnes was produced in 2010/11. There is also a number of permanent recycling facilities that have a total capacity of around 430,000 tonnes per annum.

Used rail ballast crushing

- 3.16 Worn out rail ballast is taken by rail to recycling centres for crushing into aggregate. As this material comprises high quality limestone or granite it can be re-processed for high-grade uses. In Nottinghamshire there is a railway ballast recycling centre at Toton railway sidings in Stapleford with an annual output of between 100,000 -200,000 tonnes.
- 3.17 Further information is included in the background paper on alternative aggregates and also in the Nottingham and Nottinghamshire Waste Core Strategy Documents.

Future Aggregate Provision

- 4.1 In order to provide a steady and adequate supply of aggregates over the plan period, the NPPF states that future apportionments should be based on the last 10 years average production taking into account national and sub national guidelines and any important local considerations.

National and Sub-National Aggregate Guidelines

- 4.2 Prior to the introduction of the National Planning Policy Framework (NPPF), the supply of land-won aggregates in England was based on national and sub national guidelines for aggregates provision published by DCLG. The most recent guidelines covering the period 2005-2020 were published in 2009.
- 4.3 The East Midlands Aggregate Working Party used these guidelines to produce draft apportionment figures for each MPA. The figures were then approved by the East Midlands Regional Assembly in 2010 and were to be incorporated into the Regional Plan via the review process. However due to the abolition of the Regional Spatial Strategy the figures were never adopted.
- 4.4 It was decided at the Aggregate Working Party meeting in February 2013 that the draft 2009 figures are now considered out of date as they were only based on aggregate output from a period of economic growth, and should, therefore, not be taken into account when determining the new apportionment figures.

Sand and gravel provision

- 4.5 By far the greatest planning issue for Nottinghamshire is the long term provision of sand and gravel over the plan period. Ensuring that the correct apportionment is identified will ensure adequate provision is made without resulting in overprovision and the unnecessary allocation of sites.
- 4.6 Based on the 10 year average sales methodology, the sand and gravel apportionment would be 2.58 million tonnes. This figure reflects the current downturn, however as the methodology is based on a period of economic growth as well as the recession it provides a level of flexibility for the future when the demand for sand and gravel increases. The 3 year average is 1.51 million tonnes and reflects the current economic downturn and illustrates the subdued nature of the construction industry at present. As this is the first 3 year average to be produced it is difficult to identify any short term trends.
- 4.7 This can be compared against recent sub national guidelines (see Table 3) although as stated earlier the 2009 draft apportionment figures have been discounted by the East Midlands Aggregate Working Party as they are now considered out of date. This is because they were based solely on a period of economic growth in the early to mid 2000s.

Table 3: Sand and Gravel Apportionment

	NPPF 10 year average	Current Minerals Local Plan apportionment	Draft 2009 apportionment
Sand and gravel (million tonnes)	2.58	2.65	3.25

Resource depletion in the Idle Valley

- 4.8 The Idle Valley, located in the north of the county has a long history of sand and gravel extraction. Traditionally a large proportion of this has supplied markets in Yorkshire and Humberside due to its close proximity and limited mineral reserves elsewhere.
- 4.9 Resource depletion is now starting to limit output, and over the last 10 years the number of active quarries has fallen from 9 to 6. This has seen capacity fall from around 1.5 million tonnes in 2003 to around half in 2011. Some of the loss of capacity is due to the recession delaying the implementation of the permitted quarry at Sturton Le Steeple although further reserves will still be required in the future. From the call for sites, 2 greenfield sites have been put forward as well as a number of extensions to existing sites, however even if all these sites were allocated and gained planning permission capacity is unlikely to increase to levels seen previously as existing quarries close.
- 4.10 The full impact of the lower output is difficult to predict at present due to the recession, although if demand increases significantly over the plan period reserves elsewhere will be needed to cover the shortfall.
- 4.11 Production will either increase from the Trent Valley close to Newark, a significantly greater distance from the markets in Yorkshire and Humberside or reserves outside the county will need to be sourced. If reserves outside the county are exploited or a combination of different sources are used this could see exports from Nottinghamshire to Yorkshire and Humberside fall.

Sherwood Sandstone provision

- 4.12 Sherwood Sandstone production is much lower than sand and gravel and historically has been in steady decline. This along with the drop in sales due to the recession is reflected in the 10 year average sales figure of 0.46 million tonnes. The 3 year average is 0.33 million tonnes and reflects the current economic downturn.
- 4.13 This can be compared against recent sub national guidelines (see Table 5 below) although as stated earlier the 2009 draft apportionment figures have now be discounted by the East Midlands Aggregate Working Party as they now considered out of date. The difference in apportionments is much lower for Sherwood sandstone than with sand and gravel as the declining output had been taken into account.

Table 5: Sherwood Sandstone Apportionment

	NPPF 10 year average	Current Minerals Local Plan apportionment	Draft 2009 apportionment
Sherwood Sandstone (million tonnes)	0.46	0.7	0.57

No additional specific local factors have been identified when considering the future apportionment for Sherwood Sandstone.

Limestone provision

- 4.14 Limestone is only worked from one quarry in Nottinghamshire and production has been very low due to the seasonal working of the site and abundance of limestone worked in Derbyshire and Leicestershire.
- 4.15 Based on the 10 year average sales methodology, the limestone apportionment would be 0.08 million tonnes which reflects the higher output levels earlier in the 10 year period. The 3 year average is 0.03 million tonnes and reflects the very low levels of extraction in recent years. See Table 6 below.

Table 6: Limestone Apportionment

	NPPF 10 year average	Current Minerals Local Plan apportionment	Draft 2009 apportionment
Limestone (million tonnes)	0.08	0.26	0.10

- 4.16 As part of the call for sites, an extension to Neither Langwith and two new greenfield quarries have been put forward. The two new quarries have been put forward to meet specific issues rather than to meet any shortfall identified over the plan period. A potential quarry has been put forward at Steetley near Worksop which would directly supply limestone to a recently built pre-cast concrete works. A key part of any planning application will be the sustainability issues related to the minimal transport required. The second is a potential quarry at Holbeck which has been put forward primarily for the extraction of Industrial dolomite. When the dolomite is extracted aggregate limestone would be available for extraction. The extraction of the aggregate limestone is being promoted by the industry to avoid sterilisation of the mineral. If either or both of these sites were permitted, output is likely to be higher than the apportionment however it is not a target or ceiling to limit production.

Future Growth

National Infrastructure Projects identified for Nottinghamshire

- 5.1 The National Infrastructure Plan identifies two projects that are currently underway in Nottinghamshire: the Nottingham Express Transit (NET) phase 2 expansion and the widening of the A453 between Junction 24 of the M1 and Nottingham. The NET expansion is likely to bring about a short term increase in demand for aggregates however construction is expected to be completed by the end of 2014. Work on the A453 widening started in January 2013 and is expected to be completed by summer 2015. The project is likely to increase demand for aggregate but this will be largely met from quarries in Derbyshire and Leicestershire as they are located closer than those in Nottinghamshire. Looking to the future the recently announced High Speed 2 line (HS2) phase two will pass along the western boundary of the county. At this stage it is difficult to identify an exact start date or indeed the exact amount of mineral that would be required for the project. However progress will be monitored through future LAAs.

Population forecasts

- 5.2 The population of Nottinghamshire (the Geographic County, including Nottingham City) is expected to grow over the plan period by almost 140,000 to about 1.23m; a rate of around 13%. Theoretically it is likely that this rate of growth can easily be accommodated in the apportionment figure as it takes into account the large export market for Nottinghamshire aggregates. However it is difficult to make a direct comparison between the figures.

House building

- 5.3 House building is a significant user of the county's aggregates and this is likely to continue over the next plan period. A steady increase in housing completions to 2030 is being planned for in District and Borough Local Plans, however this has to be offset against the significant fall in completions in recent years due to the recession. See Figure 7 below.

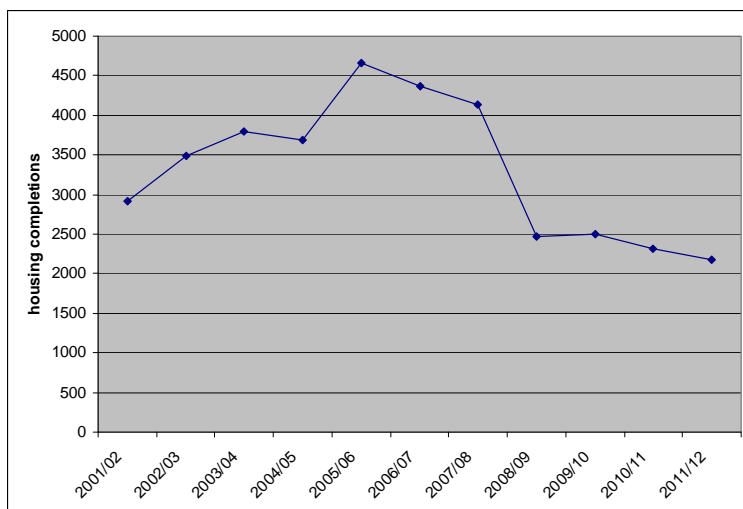


Figure 7: Housing completions 2001-2012

- 5.4 The District/Boroughs throughout the County are at different stages of their Local Plan preparations, however, all have identified their future housing requirements set out over different time periods. Planned house-building rates for the County are 4,450 dwellings per annum, somewhat higher than that achieved over the 10 years to 2010. Table 7 below identifies how this is apportioned.

Table 7: Future house building rates per annum

District/Borough	Requirement	Requirement (per annum)
Ashfield District Council	7,094 dwellings (2010-2023)	545 dwellings
Bassetlaw District Council	6,384 dwellings (2010-2028)	350 dwellings
Broxtowe Borough Council	6,150 dwellings (2011-2028)	362 dwellings
Gedling Borough Council	7,250 dwellings (2011-2028)	426 dwellings
Mansfield District Council	7,820 dwellings (2011-2031)	391 dwellings
Newark and Sherwood District Council	14,800 dwellings (2006-2026)	740 dwellings
Nottingham City Council	17,150 dwellings (2011-2028)	1,009 dwellings
Rushcliffe Borough Council	9,400 dwellings (2011-2026)	627 dwellings
TOTAL		4,450 dwellings

- 5.5 Depending on the length of the economic downturn it is expected that housing completions will increase over the plan period, as identified in the District/Borough's Local Plans. Overall this is likely to be comparable to those experienced over the past 10 years as each of the District/Borough's have yet to achieve the completions identified above.
- 5.6 Future house building over the plan period will be a significant element of the use of the County's aggregates. Planned levels are high in relation to current and recent past house-building. Consequently the steady growth in planned provision over the plan period, along with the current economic circumstances would suggest a slow and steady increase from current levels towards the planned average figures by the end of the period.

Conclusion

- 6.1 The NPPF set out the requirement for Mineral Planning Authorities to calculate their own aggregate apportionments based on the past 10 year average sales and other important considerations. This is a departure from the previous apportionment methodology which was based on national and sub national guidelines published by Central Government.
- 6.2 The recession has also seen aggregate output at a local and national level fall significantly since 2007. In Nottinghamshire this can be seen most dramatically with sand and gravel output in 2010 which fell to its lowest level since records began.
- 6.3 The provision of Sand and Gravel is the biggest issue for Nottinghamshire and over the plan period resource depletion in the Idle Valley is likely to be the biggest factor potentially influencing exports to South Yorkshire. The extent of the impact will depend on the level of demand (due to the economic conditions) over the plan period, but it is likely that sand and gravel will either be sourced from quarries around Newark or from other markets outside of Nottinghamshire to meet demand which could affect the amount of mineral being provided.
- 6.4 Sherwood Sandstone production is much lower than sand and gravel and over the plan period no specific issues have been identified.
- 6.5 Limestone production is very low due to the limited reserves and few issues have been raised. Two potential quarries have been put forward for consideration in the plan which could provide increased output, however these are being put forward for specific reasons such as sustainability reasons rather than relating to the identification of adequate reserves over the plan period.
- 6.6 The construction of the NET line 2 and the A453 widening are expected to be completed by the time the Minerals Local Plan is adopted. Longer term, the proposed route of the HS2 could increase demand for aggregates, however the timetable for this is unclear at present. A slight increase in house building is planned for in District/Borough Local Plans however the condition of the economy is likely to play a significant role in the number of housing completions. Previous levels of higher housing completions are also reflected in 10 year average sales figures.
- 6.7 Therefore based on the available information set out in this LAA it is considered that the apportionment figures developed using the 10 year average sales methodology are accurate and that there will be no significant increase in economic activity or development to warrant an increase in the level of provision.
- 6.8 This Local Aggregates Assessment will be monitored annually alongside the annual monitoring of the Minerals Local Plan (when adopted). The monitoring of the levels of demand from significant new infrastructure projects will also be key and will be undertaken through the annual review of the LAA. This will ensure that there is an adequate and steady supply of aggregate minerals provided over the plan period and that any fluctuations in future requirements can be addressed.