



Wiltshire and Swindon Local Aggregate Assessment 2022

[incorporating data from 2013 to 2022]

December 2023

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Executive Summary

The National Planning Policy Framework (NPPF) places a requirement on mineral planning authorities to prepare an annual Local Aggregate Assessment (LAA). This is a joint LAA, prepared by Wiltshire Council with agreement of Swindon Borough Council and covering the administrative areas of the two unitary authorities. This LAA reports on the demand for and supply of aggregates in the area up to and including 2022.

Aggregates in the Wiltshire and Swindon Area comprise sand and gravel deposits in two distinct forms: 'soft sand' and 'sharp sand and gravel'. There are no crushed rock producing sites in the Area. The main source of alternative aggregates arises from recycled construction and demolition waste.

There has been a long-term decline in sand and gravel production within historically worked locations of the Wiltshire and Swindon Area, which has seen sales fall considerably since 2009 with annual levels dropping below 0.5 million tonnes compared to levels of over 1.0 million tonnes from the late 1990s / early 2000s. The level of sales reported in 2022 was less than the two previous years, falling back to a level under 0.50 Mt. The 10-year rolling average remains at 0.52 Mt.

Permitted reserves in Wiltshire have declined significantly from 18 million tonnes in 2006 to 5.6 million tonnes in 2009 to 2.7 million tonnes in 2019. Few of the allocated/preferred sites provided in the Development Plan have been brought forward. With only two such allocated sites coming forward, permitted reserves have fallen to 1.4 million tonnes in 2022.

As of end 2022, the landbank for soft sand and sharp sand and gravel combined stands at 2.73 years; below the 7-year minimum required by the NPPF.

Sufficient allocated sites remain however identified in the Wiltshire and Swindon Aggregate Minerals Site Allocations Local Plan and saved policies of the previous Minerals Local Plan to meet demand. The current 10-year sales average of 0.52 million tonnes per annum is significantly lower than the rate of 1.2 million tonnes per annum provided for in the Minerals Plan. The Local Plan rate was calculated to provide an appropriate level of flexibility and contingency should economic conditions improve, resource demand increases, and landowner/mineral industry production strategies look more to the Wiltshire and Swindon area in the future. As of 31 December 2022, there remains some 11.52 million tonnes of resource allocated for working in the Development Plan but as yet undeveloped.

1. Introduction

- 1.1 The National Planning Policy Framework (“NPPF”) states that it is essential that there is a sufficient supply of minerals to provide the infrastructure, buildings, energy and goods that the country needs. The NPPF requires that minerals planning authorities plan for a steady and adequate supply of aggregates by preparing a Local Aggregate Assessment, either individually or jointly with one or more other mineral planning authorities, on an annual basis. Minerals planning authorities should make provision for the land-won and other elements of their Local Aggregate Assessment in their mineral plans.
- 1.2 A Local Aggregate Assessment (“LAA”) is an annual assessment of the demand for and supply of aggregates in a mineral planning authority’s area. National Planning Practice Guidance (“PPG”) provides that a LAA should contain 3 elements:
 - a forecast of the demand for aggregates based on both the rolling 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 e.g., marine licences for marine aggregate extraction, recycled aggregates and the potential throughputs from wharves; 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.
- 1.3 This is a joint LAA, prepared by Wiltshire Council with agreement of Swindon Borough Council and covering the administrative areas of the two unitary authorities (‘the Area’). Wiltshire Council and Swindon Borough Council plan jointly for minerals and have successfully collaborated in the preparation and adoption of a complete set of Minerals and Waste Development Plan Documents.
- 1.4 The first LAA was published in July 2012 as part of the Wiltshire and Swindon Aggregate Minerals Site Allocation Local Plan evidence base. The Councils’ second LAA, “LAA 2013”, (published September 2014) covering the years up to and including 2012, reported a considerable downturn in sand and gravel production over the previous 10-year period. This is believed to be due to macroeconomic factors and changing mineral operator strategies and/or a lack of operator interest in the remaining (more constrained) resource in the Area.
- 1.5 This LAA reports on the demand for and supply of aggregates in the Area up to and including 2022.

2. Aggregates in the Wiltshire and Swindon Area

- 2.1 Wiltshire has traditionally produced a range of minerals to serve a variety of end-use applications, including chalk and clay for cement manufacture and various high-quality limestones ('building stone'). The majority of minerals extracted in the Area are for use as aggregates - bulk granular materials such as sand and gravel which are used in the construction industry for purposes such as making of concrete and concrete products, mortar, roadstone, asphalt, or for constructional fill and drainage media. The Swindon Borough area has seen comparatively little mineral working and, at present, has no permitted mineral extraction sites.

Sand and Gravel

- 2.2 Sand and gravel deposits occur in two distinct forms within the Area: 'soft sand' and 'sharp sand and gravel'.

Soft (building) Sand

- 2.3 Soft sand is mainly used as an aggregate in the building industry for producing mortars and plasters and in the manufacture of asphalt and macadam. In Wiltshire soft sand is mainly found in the Lower Greensand deposits along with the Reading Beds, Bagshot Beds and the Corallian deposits.
- 2.4 Currently soft sand is extracted from the Lower Greensand east of Calne and from the Reading Beds at Brickworth Quarry near Whiteparish in the south of the County.

Sharp Sand and Gravel

- 2.5 Sharp sand is more angular and coarse than soft sand and is primarily used, together with gravel, as aggregate in the production of concrete, either for use directly in construction or in the manufacture of concrete products such as lintels, pipes and blocks. Sharp sand and gravel occurs almost entirely in the form of terrace deposits found in river valleys such as the Thames, Bristol Avon, Wylve and Salisbury Avon.
- 2.6 Although many of Wiltshire's sharp sand and gravel deposits have been worked at least to a small extent in the past, currently all the sharp sand and gravel produced in the area comes from sites located in the Cotswold Water Park in the Upper Thames Valley.

Crushed Rock Aggregate

- 2.7 Jurassic limestones have provided a wide variety of stone for building in Wiltshire and beyond. Whilst a single site was known to have worked these limestones for crushed rock aggregate, this ceased some 15-20 years ago and there are currently no sites in the Area working stone specifically for this purpose. Compared with the Carboniferous limestone won in Somerset and the former Avon area, Jurassic limestone is much softer and weaker. It therefore has a greater value and use as dimension stone. Reserves of crushed rock from outside of Wiltshire and Swindon are therefore relied upon.

3. Demand Indicators

Production/sales

- 3.1 The NPPF requires mineral planning authorities to plan for a steady and adequate supply of aggregates by preparing an annual LAA based on a rolling average of 10 years sales data and other relevant local information.
- 3.2 This figure is based on sales information provided by site operators in response to annual minerals surveys. The councils are reliant on the accuracy and completeness of the survey returns in undertaking its LAA.

Sand and gravel

- 3.3 The level of sales of sharp sand and gravel and soft sand in Wiltshire and Swindon over the past 10 years, from 2013 to 2022, is shown below in Table 1:

Table 1: Sand and gravel sales (sharp and soft sand combined) in Wiltshire and Swindon:

Year	Sales (tonnes)	Rolling 10-year Average (tonnes)	Rolling 3-year Average (tonnes)
2013	433,770	521,524	
2014	821,010		
2015	587,520		
2016	417,357		
2017	397,646		
2018	513,223		
2019	320,508		
2020	573,788		
2021	690,377		
2022	460,038		
			574,734

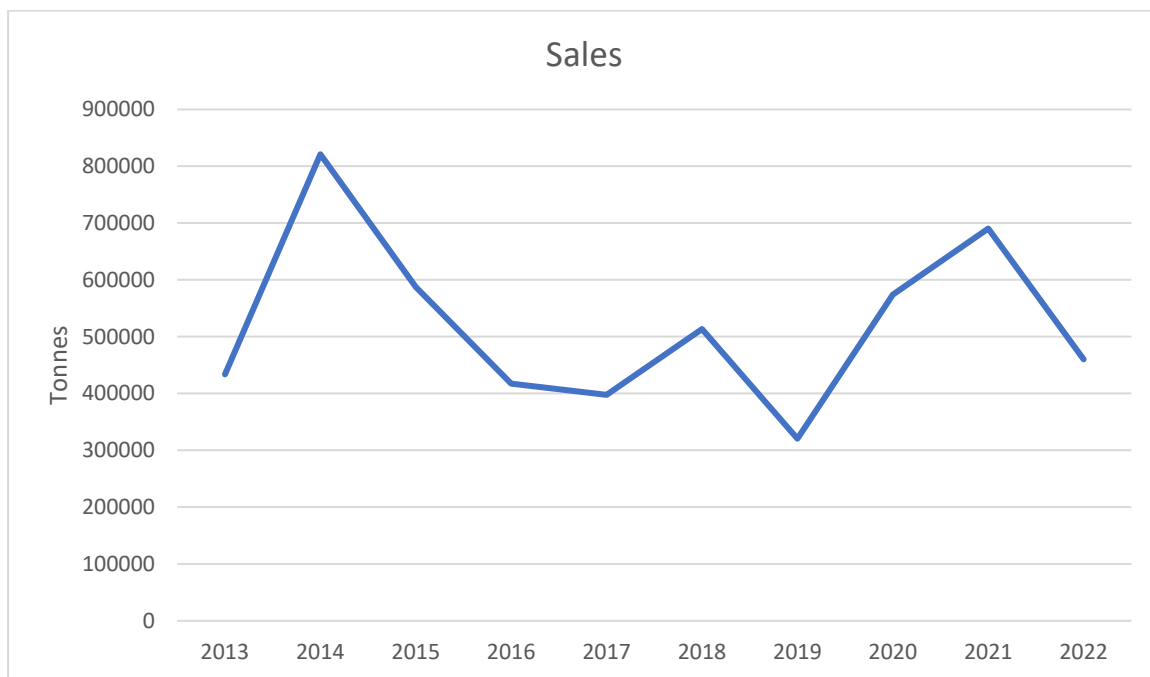
10-year average sales figures

- 3.4 In 2022 sales totalled 0.46 million tonnes (Mt) representing a 33% decrease from the previous year's figure of 0.69 Mt. This drop in the level of sales comes off the back of two consecutive years of increases, which saw the second highest year of production over the 10-year period in 2021.
- 3.5 The 10-year rolling average remains unchanged from last year at 0.52 Mt. The rate of 0.52 Mt is substantially below the rate of 1.2 Mt per annum provided for in the Aggregate Minerals Site Allocations Local Plan.

3-year average sales data

- 3.6 Advice set out in Planning Practice Guidance suggests that Mineral Planning Authorities should also look at average sales over the last 3 years to identify the general trend of demand as part of the consideration of whether it might be appropriate to increase supply.
- 3.7 The 3 yearly average figure for 2020 – 2022 is 0.57 Mt, up from 0.53 Mt, reflecting the increase in production resulting from the sites that have commenced extraction operations during this period. However, site monitoring indicates that these sites, a rapid/prior extraction operation ahead of a housing development and a relatively small extension site, will be worked out by end 2022/early 2023. With other sites reporting lower or nil sales, the overall trend is downward.

Figure 1 Wiltshire and Swindon Sales Data 2013 - 2022



Crushed Rock

- 3.8 There are currently no aggregate producing limestone quarries operating in Wiltshire and Swindon. Crushed Rock is imported into the Area from Somerset and South Gloucestershire.

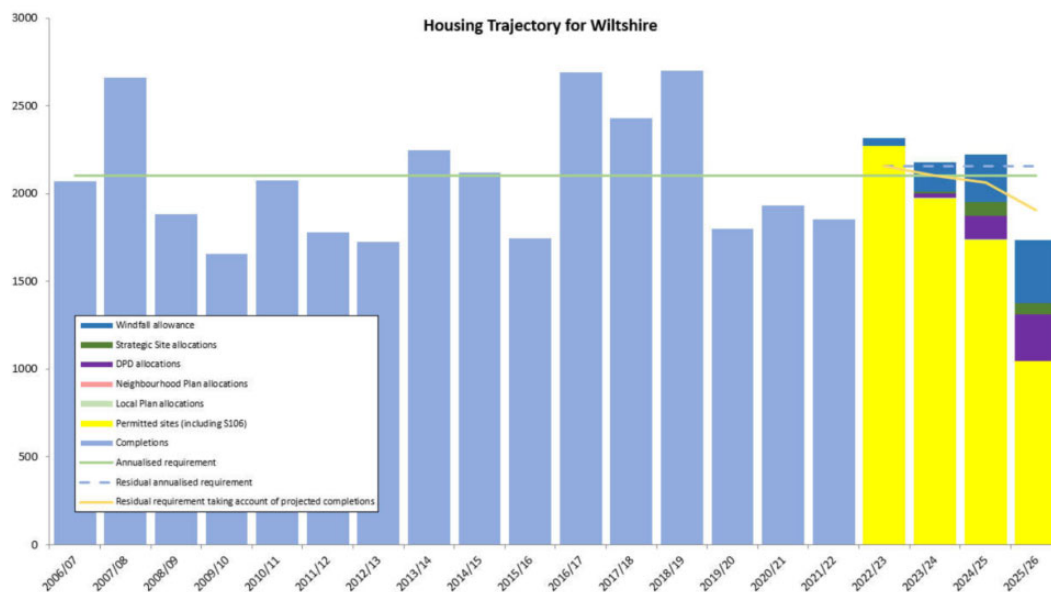
Other relevant local information

- 3.9 PPG provides that a LAA must also consider other information, such as levels of planned construction and housebuilding, when looking ahead at possible future demand for aggregates.

Housebuilding

- 3.10 The Wiltshire Core Strategy (WCS), adopted in January 2015, covers the whole of Wiltshire (excluding Swindon) and provides an overarching planning policy framework to guide development across the County for the period up to 2026. Core Policy 2 of the WCS sets out the strategic housing requirements for the plan area and proposes that Wiltshire should accommodate at least 42,000 additional dwellings over the period 2006 to 2026. The Council's House Land Supply Statement: Base Date April 2022 records the current Local Housing Need figure as 2,041 dwellings per annum.

- 3.11 Wiltshire Council monitors housing completions annually. A graphical representation of completions and anticipated future requirements for Wiltshire is shown below.



- 3.12 The Wiltshire Core Strategy is currently under review. The Wiltshire Local Plan Review DPD will assess the future levels of need for new homes and employment land over the period 2020 to 2038 and to provide an appropriate basis for housing, employment land and infrastructure provision over that period. Publication of the Pre-Submission Draft Plan for consultation is proposed in Quarter 3 of 2023 with an anticipated adoption date of End Quarter 4 of 2024.

3.13 The Swindon Local Plan 2026, adopted 26 March 2015, provides strategic planning policies for the borough which includes, at Policy SD2: The Sustainable Development Strategy, an ambitious housing requirement for delivering 22,000 new homes during the Plan period of 2011 to 2026. This housing requirement is stepped across the Plan period in anticipation of greater housing growth being delivered at the latter end of the Plan. A review of the Plan is currently underway; the Swindon Borough Local Plan 2036, covering an updated plan period from 2018 to 2036, was subject to consultation from July to October 2021. As part of the review, a local housing need of 1,055 dwellings per year was calculated.

Construction Projects

3.14 The Wiltshire Infrastructure Delivery Plan 3 2011 – 2026 (December 2016) supports the Wiltshire Core Strategy and identifies the infrastructure that is needed by new housing and employment development planned in the Core Strategy. This includes:

- Highways England highlight the following areas in Wiltshire where capacity improvements to the strategic road network may be required due to future development:
 - Amesbury and Mere (impact on A303 and its junctions)
 - Chippenham and Malmesbury (impact on Junction 17 of the M4)
 - Salisbury, Warminster, Westbury and Wilton (impact on A36 and its junctions)
- Network Rail, through the Great Western RUS, identify the following railway schemes that will affect Wiltshire:
 - Electrification of the Great Western Main Line
 - Intercity Express Programme and electrification of the network
 - Improvements to Chippenham Railway Station
 - New railway stations in Corsham and Royal Wootton Bassett

Improvements to the strategic road network

3.15 Upcoming major developments anticipated to have greater than local influence on aggregate demand include the following project(s):

Scheme name:	A303 Amesbury to Berwick Down
Current status:	Development Consent granted In November 2020. Preliminary work was planned to start in 2021 and the upgraded road section expected to be opened by December 2026. However, Development Consent was quashed by the High Court in July 2021 and application currently being redetermined
Estimated aggregate requirements:	Published scheme documents indicate a need for 645,000 tonnes of sand and gravel and 111,000 tonnes of crushed rock or recycled/secondary aggregate.

Other Highway improvement projects

- 3.16 The Wiltshire Core Strategy highlights the A350 corridor linking five major towns in the west of the plan area. Core Policy 66 provides that the route network along the corridor will be maintained, managed and selectively improved to support development growth at Chippenham, Melksham, Trowbridge, Westbury and Warminster.

Current / planned larger highway improvement works:

Scheme name:	A350 Chippenham Highway Improvements
Current status:	In the spending review in October 2021 the Government announced that it would allocate further funding for the scheme to dual the remaining single carriageway sections of the A350 route round Chippenham. The design of the remaining Phases 4 and 5 of the scheme now being undertaken and it is anticipated that construction works will be undertaken during 2024 and 2025.
Estimated aggregate requirements:	TBC

Scheme name:	A350 Melksham Bypass
Current status:	Options for the scheme were the subject of public consultation in 2021. Further design and assessment work now underway to develop the scheme in more detail. It is currently anticipated that construction would start in 2026, with the scheme opening in 2028.
Estimated aggregate requirements:	TBC

- 3.16 The Swindon and Wiltshire Strategic Economic Plan (January 2016) prepared by the Swindon and Wiltshire Local Enterprise Partnership notes that the population of Swindon and Wiltshire continues to grow at above the national rate and that it will be important that planned housing completions are brought forward on schedule in order to sustain population growth in the future, with the delivery of key road junction and infrastructure improvements as priority actions to support economic and planned development growth.
- 3.17 The level of construction activity associated with future housing and infrastructure growth within Wiltshire and Swindon and the surrounding area, primarily within the principal settlements, will lead to a continuing requirement for mineral resources. The minerals provision rate of 1.2 Mtpa provided for in the Site Allocations Local Plan was calculated to provide flexibility to increase production as and when economic conditions dictate, but it will depend on the aggregate companies submitting appropriate planning applications to realise this.

4. Supply Options

Current Supply from Wiltshire and Swindon

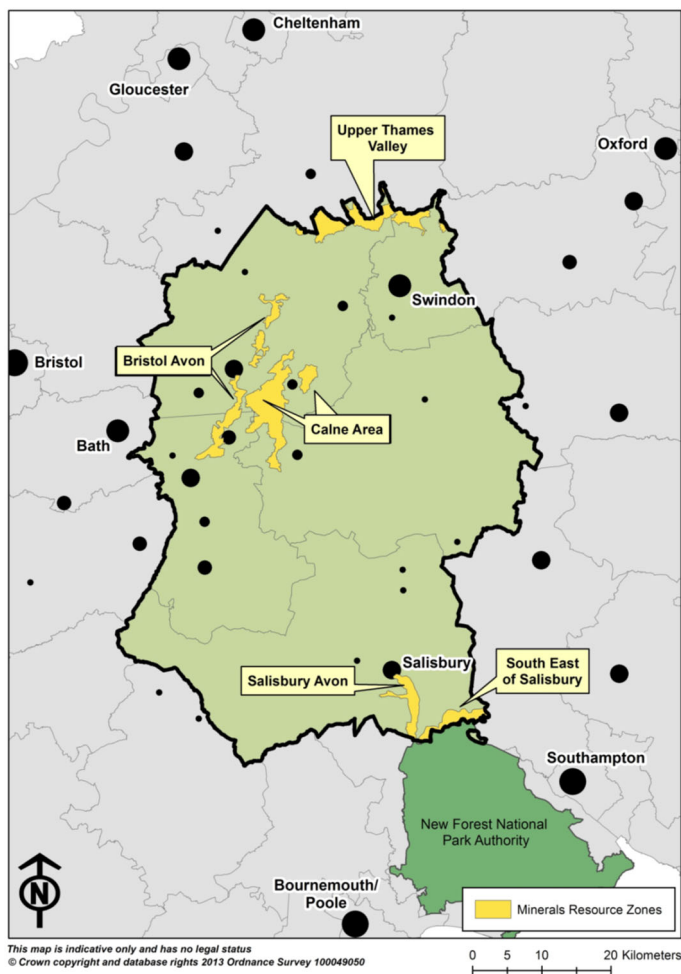
4.1 Unlike other forms of development, the location of sites for minerals extraction is essentially dictated by the extent and accessibility of the underlying geology and market demand for the mineral in that particular location.

Land-won resources

4.2 Historically, a significant proportion of primary aggregates originating from the Wiltshire and Swindon Area has been supplied from the relatively unconstrained sand and gravel deposits of the Upper Thames Valley, which crosses the northern boundary of Wiltshire and Swindon, and northwards into Gloucestershire and eastwards into Oxfordshire. The remainder is supplied from soft sand producing quarries near Calne / Compton Bassett and land to south-east of Salisbury (near Whiteparish).

4.3 The adopted Wiltshire and Swindon Minerals Core Strategy identifies five broad locations referred to as 'Mineral Resource Zones' (MRZ) to be capable of providing a long-term supply of sand and gravel.

Figure 2: The location of Mineral Resource Zones in Wiltshire and Swindon



- 4.4 There are (as of December 2022) 6 sand and gravel producing sites in Wiltshire and Swindon as detailed below in Table 2:

Table 2: Permitted sand and gravel sites in Wiltshire and Swindon 2022

Site Name	Operator	Mineral	Current Planning Permission 'End-Date'
Upper Thames Valley MRZ			
Dairy Farm / Manor Farm Complex	Moreton C Cullimore	Sharp sand & gravel	October 2025
Latton North (Areas 6 & 1)	Hills Quarry Products	Sharp sand & gravel	October 2031
Cotswold Community	Hills Quarry Products	Sharp sand & gravel	July 2023
Whetstone Bridge Quarry - South	Moreton C Cullimore	Sharp sand & gravel	July 2026
Calne MRZ			
Compton Bassett/Calne	Hills Quarry Products	Soft Sand	May 2029
South East of Salisbury MRZ			
Brickworth	Raymond Brown	Soft Sand	August 2028

- 4.5 The total permitted reserve (as of end December 2022) of sand and gravel at these sites was 1,426,000 tonnes.

- 4.6 This figure is based on reserve information provided by site operators in response to annual minerals surveys. The councils are reliant on the accuracy and completeness of the survey returns in undertaking its LAA. Permitted reserve includes current non-working sites but excludes those sites where mineral working cannot take place until there has been a review of the planning conditions attached to their planning permission. Eysey Manor Farm, included in Table 2 of LAA 2021, ceased production in 2022 ahead of its planning permission end date of October 2026. The permission for Latton North Quarry was extended in July 2022, although the new end date of 2031 is by when restoration is to be completed and extraction is expected to be completed much sooner.

- 4.7 The graph below shows the reserves figure for sand and gravel in Wiltshire and Swindon over the past 10 years:

Figure 3: Wiltshire and Swindon Permitted Reserves 2013 - 2022:



4.8 The graph shows that permitted reserves in Wiltshire and Swindon continue to fall, with current reserves dropping to under 1.5 Mt. Despite the uplifts in 2017 and 2018, the overall picture shows a long-term decline in reserves over the 10-year period. Since 2018 only two planning applications (each for allocated sites or part of) have been submitted to the councils to replenish reserves of sand and gravel. No planning permissions were granted for additional sand and gravel reserves within Wiltshire and Swindon in 2022.

4.9 There are currently no aggregate producing limestone quarries operating in Wiltshire and Swindon. Crushed Rock is imported into the Area from Somerset and South Gloucestershire. Data from the most recent Aggregate Minerals survey of England and Wales records that 955,000 tonnes of crushed rock was imported into Wiltshire during 2019, compared to 1,116,000 tonnes in 2014.

Marine Aggregate

4.10 The Area is land-locked and therefore has no licenced areas for marine aggregate extraction. However, the Aggregate Minerals Survey of England and Wales 2019 (published 2021) records 32,000 tonnes of marine-won sand and gravel was imported into the Area in 2019.

Rail-head capacity

4.11 The Rail Aggregate Depot at Royal Wootton Bassett provides for the handling and transportation of crushed rock aggregate (i.e., the importation, storage and onward exportation of aggregate) from quarries located in the Mendip Hills in Somerset. However, the majority of crushed rock is imported into the Area by road.

Landbank

- 4.12 The NPPF requires minerals planning authorities to plan for a steady and adequate supply of aggregates by making provision for the maintenance of landbanks of at least 7 years for sand and gravel and at least 10 years for crushed rock. This is determined by comparing the permitted reserve and the annual rate of future demand based on the latest annual Local Aggregate Assessment, to indicate life in years of the reserve.

Sand and gravel

- 4.13 In the interests of protecting commercial confidentiality and to accord with Policy MCS1 of the adopted Minerals Core Strategy, Wiltshire and Swindon Borough councils do not (in policy terms) differentiate between different mineral types for the purposes of landbank maintenance.
- 4.14 As of end 2022, the landbank for soft sand and sharp sand and gravel combined stands at 2.73 years; less than the 7-year minimum.
- 4.15 Recent planning applications have suggested a potential shortfall in soft sand supply from within the Area. The issue of whether a combined or separate landbank for soft sand should be calculated and maintained will be explored further as part of the review process outlined in both council's Local Development Scheme to identify whether existing policies need to be amended or replaced, particularly in terms of their continued conformity with national policy.

Crushed rock

- 4.16 There are currently no crushed rock aggregate producing quarries operating in Wiltshire and Swindon.
- 4.17 As noted above, Crushed Rock is imported into the Area from Somerset and South Gloucestershire. The most recent Somerset LAA states that there is approximately 366 Mt of permitted reserves for crushed rock and a landbank of 25.4 years at the end of 2021. The LAA acknowledges that Wiltshire is among the counties importing the largest amount of Somerset crushed rock. The latest West of England LAA states there are 108.77 Mt total permitted reserves of crushed rock, giving a landbank of 29.2 years. There does not therefore appear to be any supply issues with continuing to source crushed rock from Somerset or South Gloucestershire.

Imports and exports

- 4.18 Planning Practice Guidance provides that mineral planning authorities must capture the amount of aggregate that it is importing and exporting as part of its Assessment.
- 4.19 Aggregate Minerals surveys, normally undertaken at four-yearly intervals but at five yearly intervals for the current and previous survey, provide information on the sales, movement, consumption and permitted reserves of aggregate minerals. The data presented below has been taken from the three most recent national mineral surveys, conducted in 2009 (published 2011), 2014 (published 2015) and 2019 (published 2021).

Table 3: Aggregate Minerals Survey data for Sand and gravel

	Thousand tonnes		
	2009	2014	2019
Wiltshire and Swindon Total Sales	450	711	371
Wiltshire and Swindon Total Exports	184	303	239
Wiltshire and Swindon Total Imports	633	205	416
Wiltshire and Swindon Total Consumed	900	613	548

Table 4: Aggregate Minerals Survey data for Crushed Rock

	Thousand tonnes		
	2009	2014	2019
Wiltshire and Swindon Total Sales	0	45*	0
Wiltshire and Swindon Total Exports	0	22*	0
Wiltshire and Swindon Total Imports	1 116	1 116	955
Wiltshire and Swindon Total Consumed	1 116	1 140	955

* Responses to the councils' annual survey reported no sales.

- 4.20 The latest Aggregate Minerals Survey (2019) shows Wiltshire and Swindon was a net importer of aggregates, as consumption was higher than production. The Area consumed 1.5 Mt of aggregates of which approximately 90% were imported, largely crushed rock. Sales of sand and gravel were less than in 2014 and imports were higher.
- 4.21 However, there continues to be a level of exports of sand and gravel to other areas outside of Wiltshire and Swindon. Information provided by site operators in response to the annual minerals survey indicates that 75% of the materials won were retained within the Wiltshire and Swindon Area, 5% were exported elsewhere in the South West AWP area and 20% exported directly to outside of the South West AWP area.

4.22 As noted above, sand and gravel resources within the Upper Thames Valley straddle the northern boundary of Wiltshire and Swindon and extend northwards into Gloucestershire and eastwards into Oxfordshire. A Memorandum of Understanding between the four 'UTV MPAs' relating to aggregate supply from the UTV strategic mineral resource block was recently prepared during production of the Minerals Local Plan for Gloucestershire. Due to the road network, mineral resource zones to the south of Salisbury have better connectivity to parts of Hampshire and Dorset to the south.

Future aggregates supply from Wiltshire and Swindon

4.23 Planning Practice Guidance states LAAs should consider all aggregate supply options, including site specific allocations and secondary and recycled aggregate supply.

Minerals Plan site allocations

4.24 The Wiltshire and Swindon Aggregate Minerals Site Allocations Local Plan (adopted May 2013) sets out a schedule of seven sites for future sand and gravel extraction over the period up to 2026, shown in Table 5 below:

Table 5: Sites included in Aggregate Minerals Site Allocations Local Plan

	Site allocation	Site size (hectares)	Estimated yield of site allocations (Million tonnes)
Upper Thames Valley (sharp sand and gravel)	Cox's Farm (estimated 2.4mt)	106.1	8.47
	Blackburr Farm (estimated 0.81mt)	49.7	
	North Farm (estimated 0.3mt)	75.6	
	Land east of Calcutt (estimated 2.2mt)	172.6	
	Land at Cotswold Community (estimated 2.76mt)	38.56	
Calne and SE of Salisbury (soft sand)	Land near Compton Bassett (estimated 0.45mt)	23.4	2.39
	Extension to Brickworth Quarry (estimated 1.94mt)	25.2	
Totals		491.16	10.86

- 4.25 These sites, together with the Preferred Areas carried forward from Saved Policy 35 of the previous Minerals Local Plan as referred to below, were calculated to make adequate provision to meet a locally derived forecast figure of 1.2 Mt of sand and gravel per annum or 18 Mt over the plan period up to 2026.
- 4.26 The evidence gathered as part of the site identification process for the Aggregate Minerals Site Allocations Local Plan illustrated that there were very few areas left in Wiltshire and Swindon that could be considered appropriate and/or deliverable for sand and gravel extraction. The resource in these areas is either highly constrained (in the Calne area; and South East of Salisbury area) or, as in the case of the Upper Thames Valley, is depleted because of past production. The sites included in the Local Plan are deemed to be the most appropriate site options given an absence of more suitable alternatives.
- 4.27 As of end of 2022, only two of the seven site allocations have so far been taken up to meet any local level or sub-regional demand for and supply of aggregates. As noted in LAA 2021, whilst it has been suggested the lack of planning applications casts doubt on the viability of the allocations, information provided in support of recent applications point to difficulties faced by some operators in acquiring rights to extract minerals from the remaining allocated sites in the Upper Thames Valley Mineral Resource Zone. It has been suggested that sites are either not being made available for development at this time or other operators are holding options on them. A planning application for the Blackburr Farm site allocation was however received in 2022, with a decision yet to be made.

Saved minerals local plan policies

- 4.28 Policy 35 of the Wiltshire and Swindon Minerals Local Plan (adopted in November 2001) continues to be 'saved' until the first review of the Aggregate Minerals Site Allocations Plan.
- 4.29 The former Minerals Local Plan listed in Policy 35 six Preferred Areas in the Upper Thames Valley from within which the sharp sand and gravel resources required to meet forecast demand could be met. These Preferred Areas, some of which were the subject of a planning application at the time the Site Allocations Plan was being prepared, were carried forward to form part of the overall provision for sand and gravel requirements up to 2026.
- 4.30 The distribution of resource between the Preferred Areas and the size of areas involved is shown in Table 6 below:

Table 6: Minerals Local Plan 2001: Preferred Areas for Sharp Sand and Gravel:

Preferred Area	Area (hectares)	Resource (million tonnes)
1. Land east of Latton	59	1.4 (0.1 archaeological area*)
2. Eysey Manor Farm	156	2.7
3. Alex Farm	56	1.1 (0.3 archaeological area*)
4. Land north west of Water Eaton House	65	0.7
5. Round House Farm	56	1.2
6. Land north west of Latton	29	0.6
TOTAL	421	7.7 (0.4 archaeological area*)

* Mineral reserves in “archaeological areas” have been excluded, which may yet prove to be workable.

- 4.31 Of these, planning permission has been obtained to develop Preferred Area 2 - Eysey Manor Farm, Area 5 - Round House Farm and two blocks of land comprising part of Area 6 and part of Area 1 (known as ‘Latton North Quarry’).
- 4.32 The larger part of Area 1 together with Preferred Areas 3 and 4 were subject of a 2009 planning application, which also comprised the former RAF Down Ampney Airfield lying within Gloucestershire. This cross-boundary proposal sought to develop a “new sand and gravel quarry of strategic regional significance”. With a calculated total reserve of 5.0 Mt, and annual production predicted around 450,000 tonnes over a period of approximately 12 years, the ‘Down Ampney Quarry’ development scheme was promoted to make a major contribution to the demand for primary aggregates across Wiltshire and Gloucestershire over the medium term. However, following changes to estate management strategy and then ownership, the proposal was shelved in 2015. There has since been no further interest from the estate owner or mineral industry to develop this evaluated resource within Wiltshire, although a planning application has been submitted in 2021 to extract 6.5 million tonnes sand and gravel over 13 years from the extent of the former RAF Down Ampney Airfield and surrounding areas within Gloucestershire. (The application site straddles the administrative boundary; the site access is within Wiltshire and extraction area wholly within Gloucestershire.)
- 4.33 Planning permission to extract 0.3 Mt of sand and gravel from part of Preferred Area 3, in separate ownership from the remainder of the allocated area (Whetstone Bridge Quarry – South), was granted in June 2021.

4.34 The following table sets out details of the residual Allocated and Preferred Areas in terms of potential reserves:

Table 7: Status of Site Allocations in 2022

Site Name	Estimated yield of site allocation (million tonnes)	Permitted (million tonnes)	Remaining (million tonnes)
1 – Land East of Latton	1.4	0.1	1.3
2 – Eysey Manor Farm	2.7	2.7	-
3 – Alex Farm	1.1	0.3	0.8
4 - Land north west of Water Eaton House	0.7		0.7
5.- Round House Farm	1.2	1.2	-
6.- Land north west of Latton	0.6	0.4	0.2
Cox's Farm	2.4		2.4
Blackburr Farm	0.81		0.81
North Farm	0.3		0.3
Land east of Calcutt	2.2		2.2
Land at Cotswold Community	2.76	1.0	1.76
Land near Compton Bassett	0.45		0.45
Extension to Brickworth Quarry	1.94	1.34	0.6
TOTAL	18.56	7.04	11.52

4.35 In total, there remains some 11.52 Mt of resource allocated for extraction in the Development Plan as of 31 December 2022.

Other resources

4.36 The Wiltshire and Swindon Aggregate Minerals Site Allocations Local Plan recognises that in addition to the one site option identified within the Calne MRZ there exists a Mineral Site - Freeth Farm, Compton Bassett - classified as “dormant” under the provisions of the Environment Act 1995.

- 4.37 An application was submitted to Wiltshire Council in 2016 to determine the conditions to which the relevant planning permission relating to the Freeth Farm site is to be subject. The submitted working scheme proposes the release of c. 0.3 Mt of resource. Following a period of negotiation including several resubmissions, a resolution to approve the conditions to which the permission is to be subject was made in 2021. However, the application had not been 'finally determined' by the end of 2022 and so is not counted in this assessment.

Unallocated sites

- 4.38 A planning application was submitted in December 2017 to extract and process approximately 725,000 tonnes of sand and gravel from a new site within the Upper Thames Valley Mineral Resource Zone. The site is not identified in the Aggregate Minerals Site Allocations Local Plan, with the land in question having been excluded from the local plan during its preparation as not suitable for mineral working. The application was refused in May 2022 because the applicant did not provide sufficient information to satisfy planning requirements as set out in the Development Plan. No appeal was submitted against the decision.
- 4.39 Despite the low landbank of sand and gravel reserves and apparent lack of appetite for the allocated sites/preferred areas, neither the minerals industry or landowners have identified or brought forward any other land to meet demand or replenish permitted reserves in the Wiltshire and Swindon Area.

Secondary and Recycled Aggregates

- 4.40 Secondary and recycled aggregates can be used as an alternative to primary aggregates, providing a source of materials for the construction industry. The main source of alternative aggregates in the Area arises from recycled construction and demolition (C&D) waste. There are currently no significant producers or sources of secondary aggregates within the Area and so does not contribute to the supply of aggregates in Wiltshire and Swindon.
- 4.41 Information on the full nature and extent of facilities for the processing and use of recycled aggregate within the Area is limited by the fact that, in many cases, the product is managed by temporary mobile operations related to a specific redevelopment project.
- 4.42 There is currently no robust data held by the Councils to report or accurately estimate tonnages of recycled C&D waste produced in Wiltshire and Swindon and which can be reported in this LAA.
- 4.43 In 2022, a guidance note outlining various methodologies for estimating recycled aggregates was published by representatives from the National Waste Technical Advisory Board Chairs and Aggregate Working Party Chairs. The Councils are examining options for assessing recycled aggregate supply in the Area and it is intended that more data on this will be included in the next LAA.

Environmental constraints

- 4.44 The distribution of mineral resources throughout Wiltshire and Swindon is determined by geology; the same geology that creates the important landscapes and natural habitats that society values.
- 4.45 Wiltshire and Swindon has one of the richest and most varied natural, historic and built environments to be found across the country. The national significance of the landscape is acknowledged in the designation of the three Areas of Outstanding Natural Beauty of the Cranbourne Chase and West Wiltshire Downs, the North Wessex Downs and the Cotswolds. Additionally, the New Forest National Park lies along the southern boundary of Wiltshire.
- 4.46 Wiltshire's natural environment includes a network of designated wildlife sites of local, national and international status. In 2021, Natural England confirmed the Cotswold Water Park as a Site of Special Scientific Interest for its rich array of waterbirds and aquatic plants. The Cotswold Water Park (which coincides with the Upper Thames Valley MRZ) presents a range of challenges not least of which is the potential for open-water restoration to increase bird numbers and thereby the risk of bird-strike on military aircraft stationed at RAF Fairford. The historic environment includes both built heritage assets and extensive archaeological interests including the Stonehenge and Avebury World Heritage Site.

5. Balance between supply and demand


- 5.1 The long-term decline in sand and gravel production within historically worked locations of the Wiltshire and Swindon Area continues, with annual levels of sales averaging 0.50 Mt compared to 1.0 Mt a decade ago and permitted reserves declining to under 1.5 Mt at the end of 2022.
- 5.2 The level of sales reported in 2022 was less than the two previous years, falling back to a level under 0.50 Mt. As was highlighted in LAA 2021, the upturn in sales in 2020-2021 was attributable to two sites (a rapid/prior extraction operation ahead of a housing development and a relatively small extension site), commencing extraction operations rather than increasing sales from all sites. With reserves at those two sites due to be exhausted by end 2022/early 2023, extraction ceasing at Eysey Manor Farm and other sites reporting lower or nil sales, the overall trend is again downward.
- 5.3 This decline, first reported in LAA 2013, was attributed to macroeconomic factors but also changing mineral operator strategies and/or a lack of operator interest in the remaining (more constrained) resource in the Area. As of end of 2022, only two of the seven site allocations provided in the Minerals Site Allocations Local Plan (adopted 2013) have so far been taken up to meet any local level or sub-national demand for and supply of aggregates, with large parts of the six preferred areas carried forward from the former Minerals Local Plan also remaining undeveloped. The 2019 Aggregate Minerals Survey data published by the BGS recorded Wiltshire as a net importer of aggregates, which would appear to suggest that demand for aggregates is being met from

elsewhere. That said, responses to the annual minerals survey indicates that 25% of the materials won in Wiltshire were exported outside of the Area.

- 5.4 Permitted reserves of sand and gravel in Wiltshire and Swindon continue to fall, dropping to under 1.5 Mt in 2022. Despite uplifts in 2017 and 2018, the overall picture shows a long-term decline in reserves over the 10-year period. Few of the allocated/preferred sites provided in the Development Plan have been brought forward to replenish reserves of sand and gravel. As of end 2022, the landbank for soft sand and sharp sand and gravel combined is significantly below the minimum level of 7 years set by the NPPF at only 2.73 years.
- 5.5 Whilst landbanks are used principally as an indicator of the security of aggregate minerals supply, and to indicate the additional provision that needs to be made for new aggregate extraction and alternative supplies in mineral plans, account should also be taken of mineral plan allocations on supply provision as these can provide a broader picture of the potential supply situations. The land bank shortfall will not be overcome until further applications for mineral extraction are submitted and permitted. However, the sites identified in the Aggregate Minerals Site Allocations Local Plan and residual preferred areas under Saved Policy 35 of the Minerals Local Plan present sufficient resources to meet the forecast provision requirement over the plan period up to 2026. The Local Plan rate was calculated to provide an appropriate level of flexibility and contingency should economic conditions improve, resource demand increases, and mineral industry production strategies look more to the Wiltshire and Swindon area in the future.
- 5.6 The level of construction activity associated with future housing and infrastructure growth within Wiltshire and Swindon and the surrounding area, primarily within the principal settlements of Swindon, Chippenham, Trowbridge and Salisbury, will lead to a continuing demand for mineral resources. The Wiltshire Core Strategy is currently under review. The Wiltshire Local Plan Review DPD will assess the future levels of need for new housing, employment land and infrastructure provision over the period 2020 to 2038. Adoption of the Plan is anticipated by End Quarter 4 of 2024. The housing requirement set out in the Swindon Local Plan anticipates greater housing growth being delivered at the latter end of the plan period of 2011 to 2026. Several highway improvements to A350 corridor are also planned in the next few years.
- 5.7 The Site Allocations Local Plan demonstrated that the expected estimated yield of the allocated sites would be sufficient to meet a locally derived provision rate of 1.2 Mtpa. The current 10-year average of 0.52 Mtpa is significantly lower and at this rate there should, subject to suitable planning applications coming forward, be enough reserves to meet future demand for sand and gravel from Wiltshire and Swindon well beyond the current 2026 development plan period. There remains some 11.52 Mt of resource allocated for extraction in the Development Plan as of 31 December 2022.

5.8 The Wiltshire Local Development Scheme (LDS) December 2022 reaffirms Wiltshire Council's commitment to identify whether policies within existing minerals and/or waste plans need to be amended or replaced, particularly in terms of their continued conformity with national policy. Following completion of the review process, in co-operation with Swindon Borough Council, consideration will be given to the introduction of new plans into the LDS by the council's Cabinet. The Swindon Borough LDS (December 2022) makes a similar commitment.

DASHBOARD

Wiltshire and Swindon LAA, 2022									
	Sales (Mt) 2022	Av. (10 yr) sales (Mt)	Av. (3 yr) sales (Mt)	Sales trend	LAA rate (Mtpa)	Reserve (Mt)	Landbank (Years)	Capacity (Mtpa)	Comments
Sharp Sand and Gravel	Confidential								Due to commercial confidentiality and Development Plan policy, data for sand and gravel types is combined.
Soft Sand									
All Sand and Gravel	0.46	0.52	0.57		0.52	1.43	2.73	0.75	The level of sales falls back to under 0.50 Mt. Permitted reserves continue to decline, with few sites being brought forward to replenish reserves within the Wiltshire and Swindon area.
Crushed Rock	0	0	0						No hard rock producing sites in Wiltshire and Swindon.
Recycled/Secondary Aggregates	No data	No data	No data						Information not currently available.
Marine Sand and Gravel									No direct imports to Wiltshire and Swindon
Rock Imports by Sea									
Rail Depot Sales (Sand & Gravel)									
Rail Depot Sales (Crushed Rock)	*	*	*					*	Only active rail depot is Royal Wootton Bassett. Data cannot be provided due to commercial confidentiality.
Comments	Permitted reserves drop below 1.5 Mt, but there remains some 11.52 Mt allocated in the Minerals Plan to meet demand for sand and gravel from the Wiltshire and Swindon area, subject to suitable planning applications coming forward.								

This document was published by the Spatial Planning team,
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For further information please visit the following website:

<http://www.wiltshire.gov.uk/planning-policy>