Kent County Council Local Aggregate Assessment (2020) Dashboard

The County Council normal conducts aggregate monitoring (AM) each year and produces a comprehensive Local Aggregate Assessment (LAA) each year based on the previous years sales and reserves data. In 2020 this exercise has been done by the British Geological Survey (BGS), on a national basis. This entails collecting 2019 aggregate sales and reserves data for all landwon aggregates (in Kent this is the land-won sands and gravels, soft sand and hard rock). The County Council will not see this data until 2021. Though it was free to collect imported aggregates (vis wharves and rails heads) and aggregates derived from construction and demolition wastes and industrial by-products.

Therefore, it was decided that a comprehensive LAA will be produced in 2021 for both the 2019 data nationally collected by the BGS and the 2020 data collected by the County Council. In order to report something for 2020 a ‘dashboard’ has been produced that includes ‘rolled over’ 2018 sales data (it assumed the same sales for 2019 that was recorded in 2018) for the land-won aggregates and the actual 2019 imported and artificial aggregate sales data that the County Council has collected. Therefore, a degree of extrapolation of the 2018 data has been used alongside the collected 2019 data to derive a set of sales averages and reserve estimations for monitoring purposes. The true picture of what happened in 2019 will be reported in LAA2021.

Kent County Council LAA2020 (using part extrapolated data from 2018 monitoring for the calendar year 2019)

Aggregate Mineral Type (and origin; land-won, marine dredged and imports)	2019 Sales in tonnes or mt [1]	Average (10 yr.) Sales in tonnes or mt	Average (3yr) Sales in tonnes or mt	Trend (10 yr. sales)	Trend (3 yr. sales)	LAA Rate mtpa	Assumed Reserve as per end of 2019 mt	Permitted Landbank (current Assumed Reserves divided by current sales)	LAA 7-year Landbank based on LLA Rate	Productive Capacity (tpa)	Comments
Soft Sand (excluding silica sand)	493,179*	471,313	501,924	↓	↓	471,313	7.81	15.8 years	7-year landbank is 3.291mt Reserves are assumed 7.81mt LAA Rate is 0.471mtpa LAA Rate landbank is 7.81mt/0.471=16.58 years	920,000 (assumed as no change from 2018 data)	The soft sand reserve base is assumed to have decreased due to further extraction in 2019 without replenishment. The LAA rate is the same as the 10-year average, given it is considered that local modelling to justify an increase in this metric when calculating need is inherently unreliable. Therefore, the NPPF requirement as set out in paragraph 145 is considered the appropriate method to identify future supply needs. The assumed permitted reserves (7.81mt) will likely fall below the 7-year NPPF landbank minimum (3.291mt) in some 10 years' time at the current LAA Rate sales extraction rate.

[1] * denotes that the sales are 'assumed' for the purposes of this Kent LAA2020 dashboard given the current unavailability of the nationally collated aggregate monitoring returns for sales in 2019

Sharp Sand & Gravel	119,259*	337,034	129,894	↓	↓	337,034	3.18	26 years	7-year landbank is 2.36mt Reserves are assumed 3.18mt LAA Rate is 0.337mtpa LAA Rate landbank is 3.18mt/0.337=9.44 years	1,150,000 (assumed as no change from 2018 data)	The reserve base has decreased from 3.30mt in 2018 to an assumed 3.18mt, no new planning permissions have replenished the overall landbank over this time. The LAA rate is the same as the 10-year average, given it is considered that modelling to justify an increase in this metric is inherently unreliable. Therefore, the NPPF requirement as set out in paragraph 145 is considered the appropriate method to identify supply needs. As reported in LAA2019, the fact of significant operations moving across the Kent-East Sussex border in the past (but within the last 10-yeras) continues to have the effect of lowering the sales averages and extending the apparent available landbank life in Kent. The historic Kent market, that the Lydd Quarry continues to serve does so from outside Kent. Mineral is extracted from outside East Sussex. The Kent landbank life and sales averages figures should be treated with caution as they are being lowered by the cessation of Kent recorded sales from Lydd. However, it is reasonable to assume that the pattern of sales and consumption along the east-west axis in this area of the two respective authorities has not necessarily materially changed. Therefore, it can be concluded overall that the Kent land-won sharp sand and gravel resources continue to be depleted by consumption at a rate similar to that of the past without replenishment.

All Sand & Gravel (land-won)	614,438*	808,730	633,152	⬇	⬇	614,438	10.98	N/A	N/A	N/A	This demonstrates that Kent continues to produce a significant quantity of land-won sand and gravel aggregates, though the 10-year average is in decline. This essentially being due to the reductions in land-won sharp sand and gravel sales, and sales from one site now being recorded in East Sussex County Council's area. Both the short-term and longer-term sales average are showing a downward trend. The lack of reserve replenishment continues.
Crushed Rock (land-won)	c[2]	c	C	c	c	0.78[3]	c	c	Remains In excess of 30 years	c	Kent continues to have only two active hard rock sites producing aggregates; therefore, the agreed level of confidentiality would be breached if the sales figures were to be disclosed. However, reserves remain significant and will meet NPPF requirements for the foreseeable future.
Recycled/ Secondary Aggregates	1.195	0.845	0.953	⇧	⇧	0.845	N/A	N/A	N/A	The 2019 reported data shows an total of 4,008,000tpa (3,498,000tpa aggregate productive capacity from C,D&E wastes and 510,000tpa from industrial by products)	Sales of secondary and recycled aggregates (derived from both the C, D & E waste and industrial by-products sectors) increased in 2019 compared to 2018 (from 0.758mt to 1.195mt an increase of 36.6%). Unlike 2018 the underlying trend is increasing for both the 10-year and three-year averages. Overall productive capacity (as recorded from Annual Monitoring (AM) returns) is unchanged. Considerable headroom of spare capacity is available to increase production from this sector of overall supply. The data indicates that increased utilisation of waste materials is occurring. How far this trend will extend in the overall supply will be found in future monitoring.

[2] C denotes a confidentiality has to be maintained

[3] 0.78 is the proxy for the anticipated land-won crushed rock production used in the adopted Kent Minerals and Waste Local Plan 2013-30, due to ongoing confidentiality this has not been updated

	2019 Sales in tonnes or mt	Average (10 yr.) Sales in tonnes or mt	Average (3 yr.) Sales in tonnes or mt	Trend (10 yr. sales	Trend (3 yr. sales)	LAA Rate mtpa	Assumed Reserve as per end of 2018 mt	Permitted Landbank (current Assumed Reserves divided by current sales)	LAA 7-year Landbank based on LLA Rate	Productive Capacity (tpa)	Comments
Marine Sand & Gravel (mt)	1.809*	1.812	1.797	⬇	⬇	1.809	N/A	N/A	N/A	Theoretical maximum wharf capacity is approx. 7.30mtpa according to the 2010 joint Medway and Kent study, while the recorded 2018 capacity is reported as 5.80mtpa is assumed unchanged	Given the lack of 2019 sales data the downward trend indicated in the 10 and 3-year averages should be treated with caution. What remains significant is that the County has significant available 'headroom' to increase importation of marine sourced sand and gravels via wharfs in Kent.
Rock Imports by Sea	1.044*	0.835	1.048	⇧	⬇	0.818	N/A	N/A	N/A		Given the lack of 2019 sales data the downward trend indicated in the 10 and 3-year averages should be treated with caution. The 10-year average is slowing a potential increase, and the 3-year average a negligible decrease. What remains significant is that the County has significant available 'headroom' to increase importation of hard rock via wharfs in Kent.

Rail Depot Sales (Sand & Gravel)	24,917	33,148	25,775	⬇	⬇	33,148	N/A	N/A	N/A	2.38mtpa (reported) The same as 2018 capacity report	Reported sales are lower than those of 2018, which had a report of 28,194 tonnes. Both the 10-year and 3-year sales averages are also lower by 11% and 29% respectively.
Rail Depot (Soft and)	10,222	6,495	8,304	⬇	⇧	6,495	N/A	N/A	N/A		Sales are higher in 2019 with 2018 sales being only 8,477 tones. While the overall 10-year average trend is down, while the 3-year sales average trend is increasing by almost 20%.
Rail Depot Sales (Crushed Rock)	561,738	409,683	521,211	⇧	⇧	409,683	N/A	N/A	N/A		Sales increased in 2019 from 0.533Mt to 0.562Mt, and both the 10-year and 3-year average sales trends are higher.
Commentary	The extrapolated sales data show the land-won sharp sand and gravels in Kent, as a share of overall aggregate supply, as continuing to decline with no land-bank replenishments of new reserves. Soft sand from the land-won sector retains a substantial land-bank, greater than the 7-year NPPF minimum in any one year for approximately another 10 years given the extrapolated 2019 LAA Rate figure. No new reserves have been reported and both extrapolated 10 and 3-years sales averages are down. The results of the National Survey will provide a clearer understanding of how the land-won sands and gravels element of the overall supply is changing. Land-won hard rock sales remain confidential, though the substantive reserves available will enable whatever demand exists to be supplied well into the future. Importation via wharfs of marine dredged sand and gravels are extrapolated as being down. Given the lack of 2019 sales data at this time; this conclusion is to be treated with caution. The results of the National Survey will provide a clearer understanding of how this element of the overall supply is changing. Similarly, the apparent increasing trend shown by the 10 and 3-year average sales of hard rock imports will be either confirmed or corrected by the results of the National Survey once available. Available capacity for expansion remains extensive, no further loses in wharf capacity were reported in 2019. Rail depot imports sales data was made known to the County Council. The sales of Sharp sand and gravels is down, both on the 10 and 3-year sales averages. Soft sand, as an import via rail, remains insignificant in overall supply terms though sales have increased significantly compared to 2018 (up by 20%). Hard rock rail depot sales are showing some increase overall (at just over 5% up from 2018). Recycled and secondary aggregates sales exceed 1.0Mt in 2019, up 36.6% compared to 2018. Both the 10 and 3-year sales averages are showing an increasing trend; the sector has further substantial headroom for further expansion.										