

Bournemouth, Dorset and Poole

Local Aggregates Assessment 2014

(incorporating data up to and including 2014)

Bournemouth Borough Council
Dorset County Council
Borough of Poole

October 2016

Contents

Executive Summary	4
Table ES 1	4
Recycled aggregate	4
Marine dredged sand and gravel	4
Crushed rock – land-won	4
Crushed rock – rail imported	5
Crushed rock – road imported	5
Land-won sand and gravel	5
Table ES 2 – Aggregates Sales in Bournemouth, Dorset and Poole	6
1.1. Preparation of the Local Aggregates Assessment 2015	7
1.2. Aggregate sales	8
Table 1 – Aggregates Sales in Bournemouth, Dorset and Poole	8
Figure 1 – Aggregates Sales in Bournemouth, Dorset and Poole	9
1.3. The Resource	10
Sand and Gravel	10
Crushed rock	10
Figure 2 – The Sand and Gravel Resource with Aggregate Quarries Operational in 2014	12
1.4. Historic Sales – crushed rock and sand and gravel	13
Table 2 – Historic Land Won Sand and Gravel and Crushed Rock Sales (million tonnes)	13
Figure 3 - Historic Land Won Sand and Gravel and Crushed Rock Sales (million tonnes)	14
1.5. Current Supply of Land Won Aggregates	15
Table 3 – Permitted Reserves of Aggregates at 31-12-2014 (figures in million tonnes)	15
1.6. Crushed Rock	15
Landbank	15
Importation of Crushed Granite	16
Rail Imports	16
Road imports	17
1.7. Sand and Gravel	17
Landbank	17
1.8. Monitoring Separate Sand and Gravel Landbanks	18

Supply from other Mineral Planning Authorities	19
Quarries in Dorset	19
Table 4 – Status of Permitted Sand and Gravel Quarries in 2014	19
1.9. Other Sources of Aggregate Supply for Dorset	20
Table 5 – Summary of Marine Dredged and Recycled Aggregate Supply	21
Figure 4 - Historic Marine Dredged Aggregate and Recycled Aggregate Sales (mt)	21
1.10. Marine Dredged Aggregate	22
Poole Wharf.....	22
Figure 5 – Licensed Dredging Areas	22
Figure 6 – Permitted and Extracted Tonnages	22
Constraints and Future Supply	23
Figure 7 – Marine Aggregates Regional Reserve Life	24
1.11. Recycled Aggregates	24
Figure 8 – Fixed Recycling Facilities 2014	25
Table 6 - Recycled Aggregate sites	26
Constraints and Future Supply	27
1.12. Uses of Dorset’s Aggregate Resource	27
1.13. Imports and Exports from Dorset	27
Exports from Dorset.....	27
Table 7 – Destination of aggregates sold in Dorset.....	28
Consumption within Dorset.....	28
1.14. Future Demand	29
Built development.....	29
Table 8 - Proposed Housing Development in Local Plans / Development Plan Documents in Bournemouth, Dorset and Poole	29
Historic Levels of Development.....	30
Table 9 - Net Annual Completions	31
Projected Development beyond current Plan periods.....	31
Table 10 - Bournemouth, Dorset and Poole - Projected development beyond current Plans	32
1.15. Maintaining Supply	33
Capacity and Constraints.....	33
1.16. Final Comment	34

Executive Summary

- E.1. In Bournemouth, Dorset and Poole, total sales of all types of aggregate in 2014 were 2.4 million tonnes (mt), an increase of almost 280,000 tonnes over the 2013 figure of 2.15 mt. The greatest increase was in land-won crushed rock. The total sales figures for 2013 and 2014, broken down by aggregate type, are set out in Table ES 1 below:

Table ES 1

Type of Aggregate	2013 (%)	2014 (%)
Recycled	305,596 * (14.2%)	322,324 * (13.2%)
Marine Dredged	76,062 (3.5%)	92,982 (3.8%)
Crushed Rock – Local Land-won	169,280 (7.9%)	282,772 (11.6%)
Land-won Sand and Gravel	1,602,685 (74.4%)	1,733,361 (71.4%)
Totals	2,153,623	2,431,439

* Partly estimated due to lack of returns from some operators

- E.2. Table ES 2 (below) summarises results and sets out the ten year average and three year average sales figures (with the exception of recycled aggregates, where only 9 years of data are available) for all the types of aggregates produced in Bournemouth, Dorset and Poole.

Recycled aggregate

- E.3. In 2014 recycled aggregate sales increased again, after a drop in 2013. As noted, sales are likely to be higher than is indicated by recording output from permitted sites. Sales in 2014 were approximately 320,000 tonnes, equal to the 2012 total which was the highest since records were kept. Permitted capacity is far in excess of this, and it is assumed that output could increase, provided the source of supply and markets were both available.

Marine dredged sand and gravel

- E.4. In 2014, the wharf at Poole imported approximately 92,000 tonnes of aggregate. Indications are that it could import more if demand existed. The highest amount imported since figures were recorded in 2003 was 110,000 tonnes in 2008, indicating a capacity for increased importation of an additional 20,000 tonnes per annum. Supply is available.

Crushed rock – land-won

- E.5. In 2014 some 280,000 tonnes of crushed rock was produced. For crushed rock, the 10 year average sales level is 220,000 tonnes per annum. The highest level of annual sales since 1999 was 440,000 in 2001. This indicates there is capacity to increase sales by up to 160,000 tonnes per annum. The landbank is far in excess of 10 years and it is considered that sales could increase if demand existed, subject to other constraints such as access between quarries and markets. The Mineral Planning Authority considers it appropriate to continue to use the 10 year average to determine the landbank.

Crushed rock – rail imported

- E.6. In 2014 the Hamworthy rail depot was not in use and no crushed rock was imported by rail from Somerset or elsewhere. The maximum amount imported since 2003 was 160,000 tonnes in 2004. The 10 year average, measured from 2003 to 2012, was some 90,000 tonnes per annum. Should imports resume, this indicates that there is capacity to import at least 90,000 tonnes per annum and this could increase provided demand existed and subject to other constraints.

Crushed rock – road imported

- E.7. This is covered in paragraphs 1.6.11 and 1.6.12 of this LAA. Approximately 260,000 tonnes of crushed rock was imported by road, primarily from Somerset. There are no planning restrictions on the amount that can enter Dorset this way and Somerset's landbank is adequate to maintain sales so subject to other constraints (e.g. traffic volumes) it is expected that supply will be maintained and can increase to meet demand as required.

Land-won sand and gravel

- E.8. Land-won sand and gravel, particularly Poole Formation sand, is by far the highest proportion of the 'mix' of supply of aggregate for Bournemouth, Dorset and Poole. There was an increase in sales between 2013 and 2014 as shown in the table above, although in percentage terms the proportion of sand and gravel decreased between 2013 and 2014, partly reflecting the sharp increase in crushed rock sales. At 1.73 mt, sales in 2014 were in excess of both the ten year average figure of 1.57 mt and the three year average figure of 1.59 mt.
- E.9. This increase in sales is likely to be a response to a general upturn in development in a strengthening economy. It is also noted that the rate of housing completions, one possible measure of future demand, is likely to increase in the future although no sharp, short-term increases are expected. There are no other projects likely to lead to sharp, sudden changes in demand. If economic improvement continues, demand may continue to rise, although there is no certainty that the upturn in economic activity will continue. However, if the increased demand for aggregate incorporates a lag effect from the recent recession, with a number of unimplemented permissions being developed, then this higher level of demand may not be sustained.
- E.10. Future sales will be met from existing permitted reserves together with the sites and areas to be identified and allocated through the emerging Mineral Sites Plan. If demand for land-won sand and gravel remains at a sustained high level then sales could remain above the 10 year average, provided there were no planning (or other) constraints (e.g. numbers of lorry movements) coming into play. Table 1 indicates that for land-won sand and gravel, in 2005 sales were 1.71 mt (mt) and in 2008 sales were 1.67 mt. These figures predate the recent recession and demonstrate that aggregate sales have reached this level when the economy is performing well and could potentially do so again if the demand was there. However, sales at this level would see the landbank reduce at a faster level and could trigger a review of the aggregates provision strategy of the 2014 Bournemouth, Dorset and Poole Minerals Strategy.
- E.11. If sales continually exceed the 10 year average by a significant amount, the Mineral Planning Authority can either continue to use the 10 year average figure to estimate the size of the landbank and wait to see if the level of increase is maintained or falls off; or take more account of the most recent trends to determine the landbank, for example by adding a contingency figure to the 10 year average.
- E.12. All sources of aggregate demonstrate capacity for some increase in supply, should demand increase, and no sharp increases in demand are expected in the next year. In the longer term, there are adequate landbanks for sand and gravel and crushed rock. The emerging Mineral Sites Plan seeks to identify and allocate adequate new sites to maintain production and sales and allow for flexibility in the market. If for some reason it proves impossible to maintain supply, the strategy for mineral provision will have to be re-visited. It is therefore considered that it is appropriate to continue to use the 10

year average figure, as set out in this Local Aggregates Assessment, to establish the size of the landbank and level of provision for both sand and gravel and crushed rock.

Table ES 2 – Aggregates Sales in Bournemouth, Dorset and Poole

Aggregate types	1999	2000	2001	2002	2003	2004	2005	2006	2007	2008	2009	2010	2011	2012	2013	2014	10 YEAR AVERAGE	3 YEAR AVERAGE	
River Terrace	0.48	0.59	0.66	0.57	0.74	0.71	0.63	0.7	0.56	0.67	0.26	0.46	0.42	0.48	0.49	0.56	0.52	0.51	
Poole Formation	0.84	1.02	1.15	0.99	0.89	0.95	1.08	1.10	1.00	1.00	1.00	0.95	1.1	0.95	1.11	1.17	1.05	1.08	
Total Land Won Sand and Gravel	1.32	1.61	1.81	1.56	1.63	1.66	1.71	1.8	1.56	1.67	1.26	1.41	1.52	1.43	1.60	1.73	1.57	1.59	
Crushed Rock - Locally Won	0.31	0.42	0.44	0.38	0.34	0.30	0.20	0.19	0.27	0.29	0.27	0.26	0.15	0.15	0.16	0.28	0.22	0.20	
Crushed Rock - Rail Imported	Not available				0.14	0.16	0.12	0.1	0.1	0.11	0.03	0.05	0.07	0.04	0.00	0.00	0.06	0.01	
Marine Dredged Sand and Gravel	Not available				0.07	0.08	0.08	0.10	0.09	0.11	0.08	0.09	0.09	0.09	0.08	0.09	0.09	0.09	0.09
Recycled aggregates	Not available							0.16	0.23	0.3	0.25	0.24	0.27	0.32	0.30	0.31	0.27	0.31	
Total sales	Not available							2.35	2.26	2.48	1.89	2.05	2.1	2.03	2.15	2.42	2.19	2.17	

Notes.

- 1) Figures in million tonnes per annum.
- 2) 1999 to 2002 land won sand and gravel figures sourced from SWRAWP Annual Reports 1999 - 2002.
- 3) Land-won sand and gravel 'split' between Poole Formation and River Terrace for 1999 to 2002 is estimated based on average proportional split for the years 2003 to 2014, and included in the 2014 Bournemouth, Dorset and Poole Minerals Strategy.
- 4) Recycled Aggregate average figures only go back to 2006.
- 5) **Recycled Aggregate figures for 2013 and 2014 are estimated due to incomplete returns**

1.1. Preparation of the Local Aggregates Assessment 2015

- 1.1.1. Aggregates are hard granular (mineral) materials, essential requirements for a range of uses in society. They are raw materials for the construction industry, required for built development, manufacturing and the maintenance of infrastructure such as roads and sea defences. They also have other uses, including for recreational facilities and in horticulture/landscaping. They are required to support economic development. They may be primary (specifically excavated or dredged for aggregate use), secondary (produced as a by-product of some other process or excavation) or recycled from some appropriate waste material.
- 1.1.2. Land-won or primary aggregates, in Dorset, are either quarried from limestone deposits and crushed to various sizes (crushed rock) or quarried from sand/gravel formations, both bedrock or superficial, processed and sold. Marine aggregates are dredged from the sea bed. Sand is produced alongside ball clay but in Dorset it is classified as primary aggregate, not secondary, as it is generally located above the ball clay. No secondary aggregate is produced in Dorset. Recycled aggregates are derived from processed construction, demolition and excavation waste.
- 1.1.3. Paragraph 145 of the National Planning Policy Framework (DCLG, 2012) requires Mineral Planning Authorities (MPAs) to *'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 and other relevant local information, and an assessment of all supply options (including marine dredged, secondary and recycled sources)'*
- 1.1.4. This Local Aggregate Assessment (LAA) is prepared in compliance with this requirement and reviews provision of various types of aggregates from various sources in the Bournemouth, Dorset and Poole Councils (BDP) area. It also considers likely future demand for and feasibility of supply of aggregates for the future. The LAA includes data collected up to and including 2014. It incorporates data from the 4 year extended monitoring surveys, which collect data on aggregate movements between MPAs, to give a picture of relative levels of consumption by sub-national area and nationally. The most recent extended monitoring survey was in 2014, but the final report has not, at the time of writing this LAA, been published although some information has been made available. Information on flows of aggregate from Dorset is included, utilising information collected for this survey.
- 1.1.5. The LAA is intended to provide an annually-updated evidence base, to contribute to monitoring of aggregate provision and to inform MPAs' production/review of minerals plans. National Planning Policy Guidance (NPPG) refers to LAAs containing three 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 licenses for marine aggregate extraction, recycled aggregates and the potential throughputs from wharves/rail depots; 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
- 1.1.6. This is a joint LAA, prepared by Dorset County Council and covering the administrative areas of the county council and the two unitary authorities of Poole and Bournemouth. Unless specifically stated, references to the Mineral Planning Authority, or to 'Dorset', include all three Authorities. Local minerals policy is set by the Bournemouth, Dorset and Poole Minerals Strategy, which was adopted by all three Authorities in May 2014. It sets out

the strategy for the supply of minerals, including aggregates, up to 2028. Work is in progress on a Mineral Sites Plan (MSP) for Bournemouth, Dorset and Poole (BDP) to identify the sites that will deliver the various mineral needs set out in the Minerals Strategy.

1.2. Aggregate sales

1.2.1. Table 1 and Figure 1 below set out aggregate sales in Bournemouth, Dorset and Poole.

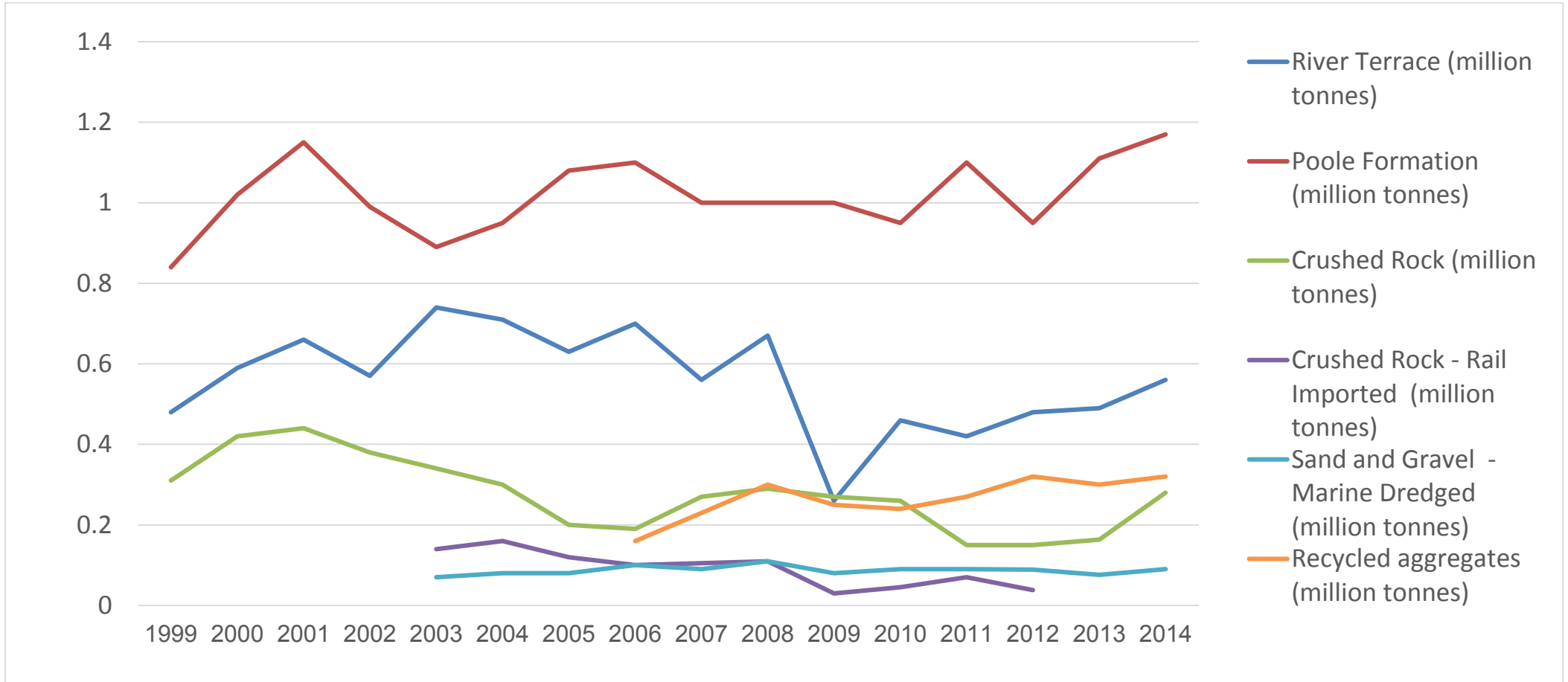
Table 1 – Aggregates Sales in Bournemouth, Dorset and Poole

Aggregate types	1999	2000	2001	2002	2003	2004	2005	2006	2007	2008	2009	2010	2011	2012	2013	2014	10 YEAR AVERAGE	3 YEAR AVERAGE	
River Terrace	0.48	0.59	0.66	0.57	0.74	0.71	0.63	0.7	0.56	0.67	0.26	0.46	0.42	0.48	0.49	0.56	0.52	0.51	
Poole Formation	0.84	1.02	1.15	0.99	0.89	0.95	1.08	1.10	1.00	1.00	1.00	0.95	1.1	0.95	1.11	1.17	1.05	1.08	
Total Land Won Sand and Gravel	1.32	1.61	1.81	1.56	1.63	1.66	1.71	1.8	1.56	1.67	1.26	1.41	1.52	1.43	1.60	1.73	1.57	1.59	
Crushed Rock - Locally Won	0.31	0.42	0.44	0.38	0.34	0.30	0.20	0.19	0.27	0.29	0.27	0.26	0.15	0.15	0.16	0.28	0.22	0.20	
Crushed Rock - Rail Imported	Not available				0.14	0.16	0.12	0.1	0.1	0.11	0.03	0.05	0.07	0.04	0.00	0.00	0.06	0.01	
Marine Dredged Sand and Gravel	Not available				0.07	0.08	0.08	0.10	0.09	0.11	0.08	0.09	0.09	0.09	0.08	0.09	0.09	0.09	0.09
Recycled aggregates	Not available							0.16	0.23	0.3	0.25	0.24	0.27	0.32	0.30	0.31	0.27	0.31	
Total sales	Not available							2.35	2.26	2.48	1.89	2.05	2.1	2.03	2.15	2.42	2.19	2.17	

Notes.

- 1) Figures in million tonnes per annum.
- 2) 1999 to 2002 land won sand and gravel figures sourced from SWRAWP Annual Reports 1999 - 2002.
- 3) Land-won sand and gravel 'split' between Poole Formation and River Terrace for 1999 to 2002 is estimated based on average proportional split for the years 2003 to 2014, and included in the 2014 Bournemouth, Dorset and Poole Minerals Strategy.
- 4) Recycled Aggregate average figures only go back to 2006.
- 5) **Recycled Aggregate figures for 2013 and 2014 are estimated due to incomplete returns**

Figure 1 – Aggregates Sales in Bournemouth, Dorset and Poole



1.3. The Resource

- 1.3.1. Dorset's varied geology makes it a mineral rich county with a diverse range of resources. Mineral extraction is tightly constrained by landscape and nature conservation interests. Much of the sand and gravel bearing areas coincide with important landscapes and designated habitats, but much also lies in areas where there are opportunities to avoid or mitigate against the adverse impact of development by re-creating habitats such as lowland heath.
- 1.3.2. Dorset contains deposits of both sand and gravel and underlying Poole Formation sands, and is also a low/moderate producer of crushed rock, sourced from Portland and Purbeck. Dorset's sand and gravel resources are largely concentrated in the south east of the county. Urban development and population also concentrate here and the built-up area sterilises much of the deposit.
- 1.3.3. Dorset has one wharf at Poole, handling marine dredged sand and gravel, one railhead at Wool which has been used for exporting sand to London and one rail depot at Hamworthy (Poole), bringing crushed limestone from the Mendips (not currently in use).

Sand and Gravel

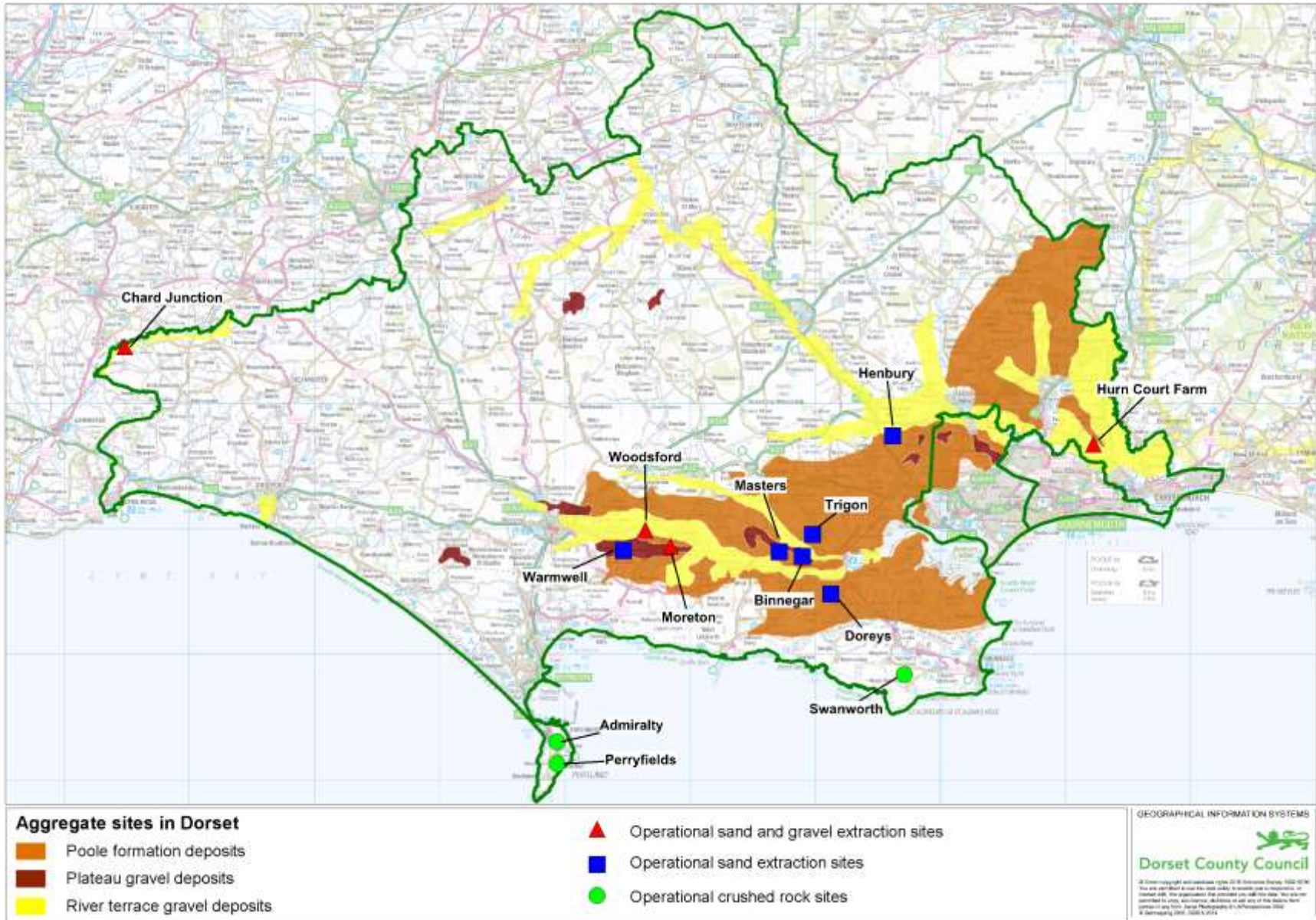
- 1.3.4. Sand and gravel in Dorset is produced primarily from Poole Formation sand (geologically considered a bedrock deposit) and river terrace or plateau sand and gravel (geologically considered a superficial deposit). Poole Formation sand is the most important source of sand in the plan area, outcropping in the south east of the county and forming hills and ridges in a broad zone stretching from Dorchester to Wareham and around the fringes of Poole and Verwood. The sands comprise a series of upward fining sequences, becoming finer grained with increasing silt content towards the south east. The large variations in particle size enable a wide range of products to be produced, but their unpredictable distribution presents difficulties. They form the most important source of sand in Dorset and give rise to the ecologically important heathlands.
- 1.3.5. Between these areas of higher land run the river valleys of the Frome, Piddle, Stour and Avon. Extensive spreads of river terrace sand and gravel are deposited along the flanks of these valleys. In the north-west, the valley of the River Axe contains exceptionally deep gravel deposits, around 20m thick. Large flint pebbles and cobbles are found within some river terrace deposits, particularly east of Dorchester. Plateau gravels are found capping many of the hills and ridges. Only isolated pockets now remain available, the majority already being worked out, built upon or of ecological importance. These deposits are of only limited economic importance.
- 1.3.6. The ball clay resource is also located within the Poole Formation with sand (and gravel) often forming a deep overburden over the clay. Permissions can be granted for the extraction of the sand and gravel, in advance of, alongside or after, the ball clay extraction. In Dorset, this sand and gravel is treated as a primary aggregate. The 2014 Minerals Strategy restricts the extraction of this sand and gravel resource associated with ball clay within the Dorset AONB.
- 1.3.7. Figure 2 below shows the general spatial distribution of these three types of sand and gravel. They occur predominantly in the south east of the plan area and coincide with the location of most of the urban development in Bournemouth, Dorset and Poole.

Crushed rock

- 1.3.8. Both Purbeck and Portland contain reserves of limestone rock famous for its use as a building or monumental stone. These areas have very different spatial characteristics and are particularly sensitive in terms of landscape and biodiversity interest. Crushed aggregate and armour stone are produced alongside dimension stone from the quarries on Portland and at one site in Purbeck. Each of the Portland quarries has reserves of dimension stone offcuts and wastage which can be used as aggregate. The mines on Portland also provide offcuts and wastage that can be crushed for aggregate use.

- 1.3.9. The Jurassic Limestone is generally regarded as relatively weak, a softer rock than Carboniferous Limestone and is normally unsuitable as a concreting aggregate. It is often used as fill or as Type 1 aggregate for construction purposes. Stone to be crushed for aggregate sales is either waste stone resulting from production of dimension stone, certain other types of stone not suitable for dimension stone or stone from the cherty series, which forms the deepest quarried bed on Portland and is only suitable for crushing. Working of the cherty beds delays quarry restoration.
- 1.3.10. Much of the current extraction on Portland takes place under a large composite planning permission granted in 1951, covering around two thirds of the plateau forming the top of the island. Extraction of dimension stone is the primary focus of the quarries/mines, and crushed rock is essentially a by-product, utilising the stone not suitable for dimension stone. This permission for quarrying lasts until 2042 and does not include mining permissions. Most recently crushed rock has been produced in two quarries on Portland. Extraction of the cherty results in a deeper void space in the quarry once extracted.
- 1.3.11. Similarly, Purbeck is an area of considerable environmental quality. The only crushed rock aggregate quarry outside of Portland is Swanworth Quarry, near Worth Matravers in Purbeck. It produces crushed rock (although not from the cherty series) from Portland Beds. Swanworth Quarry is situated within the AONB and the Heritage Coast.
- 1.3.12. Crushed rock is also imported from elsewhere, principally Somerset, both by road and historically by rail. This is much harder Carboniferous limestone suitable for road and other construction uses.

Figure 2 – The Sand and Gravel Resource with Aggregate Quarries Operational in 2014



1.4. Historic Sales – crushed rock and sand and gravel

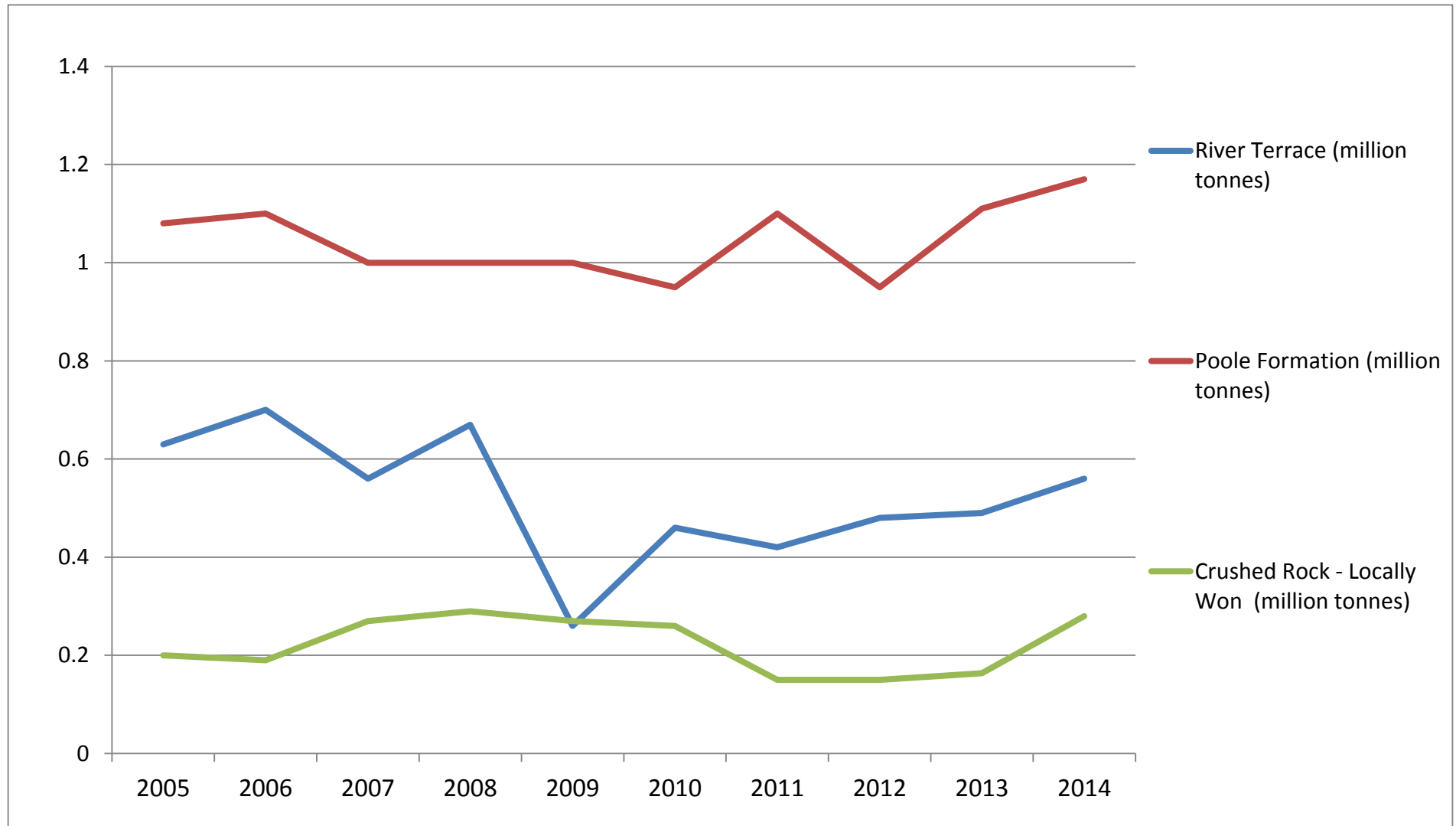
1.4.1. The National Planning Policy Framework (NPPF) requires a LAA to be based on a rolling average of sales over ten years – along with other relevant local information and an assessment of all supply options. Historic sales of land won aggregates, both sand and gravel and crushed rock, are set out below in Table 2 and Figure 3. All extraction is in the county of Dorset.

Table 2 – Historic Land Won Sand and Gravel and Crushed Rock Sales (million tonnes)

Aggregate types	2005	2006	2007	2008	2009	2010	2011	2012	2013	2014	10 YEAR AVERAGE	3 YEAR AVERAGE
River Terrace	0.63	0.7	0.56	0.67	0.26	0.46	0.42	0.48	0.49	0.56	0.52	0.51
Poole Formation	1.08	1.10	1.00	1.00	1.00	0.95	1.1	0.95	1.11	1.17	1.05	1.08
Total Land-Won Sand and Gravel	1.71	1.8	1.56	1.67	1.26	1.41	1.52	1.43	1.60	1.73	1.57	1.59
Crushed Rock	0.20	0.19	0.27	0.29	0.27	0.26	0.15	0.15	0.16	0.28	0.22	0.20

- 1.4.2. Sales of crushed rock have remained relatively constant until 2010, after which sales declined. Sales increased significantly between 2013 and 2014, with the value of 0.28 mt in 2014 being almost the highest level in the whole 10 year period.
- 1.4.3. Poole Formation sales remained relatively flat to 2010, following which there was a general upward trend albeit with fluctuations. There has been a strong upward trend since 2012.
- 1.4.4. River Terrace aggregate showed a downward trend to a low in 2009, with a pronounced decline from 2008 to 2009. Since 2009 there has been an increase in sales, although levels are not yet back to the high points of 2006 and 2008.
- 1.4.5. Table 2 shows a 10 year average of **1.57 mt per annum (mtpa)** for land won sand and gravel (Poole Formation and River Terrace combined) and **0.22 mtpa** for crushed rock.
- 1.4.6. In addition to the 10 year average, paragraph 064 of National Planning Policy Guidance advises Mineral Planning Authorities to *look at average sales over the last three years in particular to identify the general trend of demand as part of the consideration of whether it might be appropriate to increase supply*. For the three years up to and including 2014, average sales of sand and gravel (Poole Formation and River Terrace combined) were **1.59 mtpa**.
- 1.4.7. The 3 year average for crushed rock is **0.20 mtpa**, lower than the 10 year average. Even though there was a strong increase in sales in 2014, this was not enough to offset weaker performances in 2012 and 2013.

Figure 3 - Historic Land Won Sand and Gravel and Crushed Rock Sales (million tonnes)



1.5. Current Supply of Land Won Aggregates

1.5.1. Existing aggregate quarries and other facilities in Bournemouth, Dorset and Poole are set out in Appendix 1, with operational quarries shown in Figure 2. These quarries have permitted stocks of reserves, and the level of reserves at 31st December 2014 is shown in Table 3 below.

Table 3 – Permitted Reserves of Aggregates at 31-12-2014 (figures in million tonnes)

Type of Aggregate		Permitted Reserves (mt)
Land won sand and gravel	Poole Formation sand	7.74
	River Terrace sand and gravel	7.46
	Total land won sand and gravel	15.20
Crushed rock		19.63

1.6. Crushed Rock Landbank

1.6.1. The NPPF requires Mineral Planning Authorities to maintain a landbank of at least 10 years for crushed rock. If the 10 year average of sales (2005 to 2014), taken from Table 2, is applied to these reserve figures (Table 3), this gives the following results:

Crushed rock: 19.63 mt / 0.22 mtpa = 89.23 years

1.6.2. The crushed rock landbank is well in excess of the required 10 years, and also far in excess of the timescale of the current 2014 Bournemouth, Dorset and Poole Minerals Strategy or the emerging Draft Mineral Sites Plan. However, it should be noted that it is very difficult to determine (estimate) the crushed rock landbank with complete accuracy. The figure of around 19 mt is conservative, and is almost entirely located on Portland.

1.6.3. Crushed rock in Dorset is supplied from crushing of stone in the Portland quarries, and from Swanworth Quarry in Purbeck. On Portland, a large composite planning permission was granted in 1951, covering approximately two thirds of the plateau forming the top of the island and lasting until 2042. This is intended primarily to provide Portland Stone as dimension stone, but crushed rock is also produced as what is in effect a by-product, derived from the crushing of waste stone, offcuts and the underlying cherty series. Mining as a means of extracting dimension stone is becoming

more widely used on Portland, and the waste stone is used in the restoration of worked out mines, potentially reducing the availability of stone for sales of crushed rock. Threats to continued crushed rock sales also include alternative restoration options for the quarries on Portland, where various uses have been proposed (e.g. Jurassica¹ in Broadcroft Quarry). These have the potential to reduce further the availability of crushed rock. In a number of cases mineral operators have relinquished the rights to crush stone, or blast and crush cherty, all further reducing the potential availability of crushed rock in the future. There is therefore no certainty that the full 19 mt of crushed rock reserves are and will remain available for extraction and sales.

1.6.4. The Draft Mineral Sites Plan (timetabled for submission to Secretary of State in March 2017) does not propose any new open-cast quarries on Portland, in line with the policy stance of the 2014 Minerals Strategy. One mine extension is proposed. No permissions for crushed rock quarries were issued in 2014.

1.6.5. The closure of Swanworth, in Purbeck, would impact strongly on sales of crushed rock. The current Swanworth Quarry has about 6/7 years of reserves remaining. Swanworth currently produces approximately half of the annual output of crushed rock in Dorset and if the proposed Swanworth Quarry extension is ultimately unsuccessful, the annual output of crushed rock will fall significantly below the current 10 year average during the timescale of the Plan unless quarries on Portland can double their output. The Draft Mineral Sites Plan is considering an extension to Swanworth Quarry in Purbeck, the largest producer of crushed rock in Dorset. However, as the quarry and proposed extension are in the Dorset Area of Outstanding Natural Beauty, there is uncertainty as to whether or not the Plan will ultimately be able to include the proposed extension.

Importation of Crushed Granite

1.6.6. Crushed granite has in the past been imported into Poole Wharf from Northern Ireland for exclusive use in an asphalt producing plant in Poole. The amount imported relates to demand for asphalt in the area. No granite was imported in 2014.

Rail Imports

1.6.7. Hamworthy rail depot in Poole, prior to its closure in 2012, received crushed limestone from Whatley Quarry in Somerset for local distribution and use. An average of approximately 90,000 tpa was imported up to the end of 2012, while the site was still active. No aggregate was imported in 2014 as the depot is currently not operational. However, the facility remains and its re-opening remains an option should the operator wish to resume imports.

1.6.8. Opportunities for the establishment of additional rail depots are limited. In the north, where the Salisbury-Exeter line passes in and out of Dorset, the Mendip quarries are relatively close, but road links are more direct. The north-south single line from Yeovil to Dorchester passes through a rural area with limited opportunity and need for such a facility. On this line, and the main line from London to Weymouth, new depots or the expansion of existing depots are encouraged through Policy AS 4 of the Minerals Strategy 2014. No new rail depots are proposed through the call for sites carried out as part of production of the Mineral Sites Plan.

¹ A planned visitor attraction in a disused quarry on the Isle of Portland, southern England. It is based on the Jurassic Coast, a World Heritage Site, and as a subterranean geological park, will largely present the prehistoric world.

1.6.9. For rail imported crushed rock, the potential currently exists for the Hamworthy depot to be re-opened and for imports to be resumed, dependent on demand and other factors.

1.6.10. Rail sidings at Wool have been used for the export of sand from Warmwell Quarry to London, and were in use in 2014.

Road imports

1.6.11. It is difficult to put a firm figure on levels of input from road imported crushed rock as the amount brought in will depend largely on the market. Initial indications from the Aggregates Monitoring 2014 survey show that Dorset (Bournemouth, Dorset and Poole) consumed approximately 530,000 tonnes² of crushed rock, of which approximately 51% was produced in Dorset and the remainder primarily sourced from Somerset. Since the Hamworthy Depot was not in operation, this indicates that all was imported by road.

1.6.12. The Somerset Local Aggregate Assessment, incorporating data from 2005 to 2014, notes that the county had estimated permitted reserves for crushed rock at the end of 2014 of approximately 400 mt, which is estimated to last for 29.9 years. Given that it is likely that Somerset will maintain its production of crushed rock and provided the demand exists in Dorset and supply from Somerset by road is the cheapest option, it is expected that road imports will continue at levels dictated by the market.

1.7. Sand and Gravel

Landbank

1.7.1. The NPPF requires Mineral Planning Authorities to maintain a landbank of at least 7 years for sand and gravel. If the 10 year average of sales (2005 to 2014), taken from Table 2, is applied to the reserve figures (Table 3), this gives the following results:

Sand and gravel reserves at end of 2014: 15.2 mt / 1.57 mt (10 year average to 2014) = 9.68 years

1.7.2. As noted above, land won sand and gravel in Dorset comprises Poole Formation sand and River Terrace sand and gravel. The landbank for sand and gravel (both Poole Formation and River Terrace aggregates combined) at the end of 2014 was almost 10 years, in excess of the required 7 years.

1.7.3. At this time the Mineral Planning Authority is in compliance with Policy AS1 of the 2014 Minerals Strategy which states that *“An adequate and steady supply of locally extracted sand and gravel will be provided by maintaining a landbank of permitted sand and gravel reserves equivalent to at least 7 years' worth of supply over the period to 2028, based on the current agreed local annual supply requirement for Bournemouth, Dorset and Poole”*. However, existing reserves are not enough to maintain sales during the life of the emerging Draft Mineral Sites Plan and additional sites will need to be developed during the plan period.

² This figure varies from the figures provided by the BGS (*AM2014 Source of Primary Aggregates by Region – percent categories*) as there was an error in recording information collected through the 2014 AM survey.

- 1.7.4. As noted, reserves of sand and gravel at the end of 2014 were 15.2 mt. If it is assumed that the Draft Mineral Sites Plan will be adopted by the end of 2017, it can be estimated that by that time, with no new permissions, reserves at the end of 2017 will be approximately 12.83 mt. The amount of aggregate required to be planned for through the Draft Mineral Sites Plan can be estimated as 15 years (2018 to 2033) at 1.57 mt per annum (2014 figure) = 23.55 mt. If the estimated 12.83 mt of reserves at start of 2018 are subtracted, this gives an estimated figure of 10.72 mt to be provided for through new sites.
- 1.7.5. The Draft Mineral Sites Plan is expected to propose site allocations to provide around 11 mt. In addition, a sand and gravel Area of Search, identifying areas which are relatively unconstrained in landscape and biodiversity terms, will be proposed through the Draft Plan to demonstrate flexibility and additional options in meeting the demand for aggregates. These measures are expected to provide for adequate new sites for supply of aggregates.
- 1.7.6. No new sand and gravel permissions were issued in 2014.

1.8. **Monitoring Separate Sand and Gravel Landbanks**

- 1.8.1. Although the two types of land-won aggregate are to some extent interchangeable, as required by Policy AS2 of the 2014 Minerals Strategy the Mineral Planning Authority seeks to maintain and monitor separate landbanks for Poole Formation and River Terrace. This is done through monitoring sales from quarries which produce primarily one type of aggregate or the other.
- 1.8.2. At the end of 2014, levels of reserves of Poole Formation and River Terrace aggregate were similar in size, around 7.5 mt each. However, the levels of sales are different, with approximately 1.17 mt of Poole Formation (67.6%) sold compared with approximately 0.56 mt of River Terrace (32.4%) in 2014.
- 1.8.3. The ten year average sales figures from 2005 to 2014 are 1.05 mtpa for Poole Formation and 0.52 mtpa for River Terrace. If these sales figures are applied to the reserves figures, they **indicate** that the separate landbanks are around:

Poole Formation: 7.74 mt (reserves) / 1.05 mt (10 year average to 2014) = 7.37 years

River Terrace: 7.46 mt (reserves) / 0.52 mt (10 year average to 2014) = 14.34 years

- 1.8.4. Both landbanks are above 7 years, with the Poole Formation landbank being just over 7 years and the River Terrace landbank just over 14 years. Policy AS2 of the Minerals Strategy states “The Mineral Planning Authorities will maintain a separate landbank for both Poole Formation and River Terrace aggregate equivalent to at least 7 years' supply in each case”. There is greater pressure to maintain the Poole Formation landbank, for example through the emerging Mineral Sites Plan or new permissions, to demonstrate compliance with the Minerals Strategy. This is all the more relevant as one of the main producers of Poole Formation sand, Warmwell Quarry, is due to close within two years or less.

Supply from other Mineral Planning Authorities

- 1.8.5. Initial indications from the Aggregates Monitoring 2014 survey show that Dorset (Bournemouth, Dorset and Poole) consumed approximately 800,000 tonnes of sand and gravel³, of which approximately 80%-90% was produced in Dorset and 10%-20% was imported from Hampshire, with very small amounts from other mineral planning authorities, including Devon and Wiltshire.
- 1.8.6. The supply from Hampshire is expected to be maintained, with two site allocations identified in the Hampshire Minerals and Waste Plan 2013 (Purple Haze at Verwood and Roeshot at Christchurch) being immediately adjacent to Dorset. As these sites are developed, it is expected that they will provide a significant local supply of aggregate to Bournemouth, Dorset and Poole.

Quarries in Dorset

- 1.8.7. Table 4 below lists the sand and gravel quarries in Dorset, showing the end-dates for the permissions and providing some comments on each site. A key issue identified will be a reduction in supply of Poole Formation sand following the closure of Warmwell Quarry at the end of 2016. To date no successor site has been identified. It is expected that other quarries will increase their output to meet demand and make up the shortfall, which will deplete the landbank more quickly and give greater urgency to the need to secure new Poole Formation sand permissions.

Table 4 – Status of Permitted Sand and Gravel Quarries in 2014

Name of Quarry	Operator	(Predominant) Aggregate Type	End of Permission
Binnegar Quarry	Raymond Brown	Poole Formation sand	End of 2015 (??) – successor (extension) site identified and under consideration
Dorey's Pit	Holme Estate	Poole Formation sand	30.09.2026
Hines	Hanson	Poole Formation sand	30.05.2016
Hyde	Hanson	Poole Formation sand	22.02.2042
Masters North and South	Holme Sand & Ballast	Poole Formation sand	When mineral deposit is extracted or by 31.12.2032, whichever is sooner.

³ This figure is taken from tables supplied by the British Geological Survey and prepared from data collected from the 2014 national aggregates data collation. The tables indicate consumption by sub-region and identify the source MPAs that aggregates are imported from.

Name of Quarry	Operator	(Predominant) Aggregate Type	End of Permission
Trigon Hill	Landowner	Poole Formation sand	31.12.2015 application to extend time limit currently awaiting decision
Warmwell Quarry	Aggregate Industries	Poole Formation sand	31.12.2016
Tatchell's Quarry	Aggregate Industries	Poole Formation sand	30.09.2018 or exhaustion of mineral reserve, whichever is sooner
Henbury Pit	M B Wilkes	Poole Formation sand	21.02.2042
Moreton Pit	G Crook & Sons	River Terrace sand and gravel	31.12.2018
Avon Common	Tarmac	River Terrace sand and gravel	11 years from commencement of sales of sand and gravel – which has not yet begun although permission is implemented
Chard Junction Quarry	Aggregate Industries	River Terrace sand and gravel	31.03.2023
Hurn Court Farm	New Milton Sand & Ballast	River Terrace sand and gravel	26.09.2019
Woodsford Quarry	Hills Quarry Products	River Terrace sand and gravel	2028

1.9. Other Sources of Aggregate Supply for Dorset

1.9.1. As is the case with many other Mineral Planning Authorities, there are other sources of aggregate that Dorset can rely on, in addition to land-won aggregate. These are:

- marine dredged aggregate – sand and gravel dredged from the licensed dredging areas off the south coast

- recycled aggregate – aggregate recycled from the processing of construction, demolition and excavation waste (CDEW), at either fixed processing sites or at construction sites
- secondary aggregates are materials produced as industrial by-products, such as foundry sand or crushed glass. In the past spent foundry sand has been imported into Poole for use at the asphalt plant there, but these secondary aggregates were not imported in 2014. They can also be by-products of other mineral extraction as in the case of the sand removed to access underlying ball clay. However, in Dorset sand from this source is included with primary aggregate and is not recorded separately.

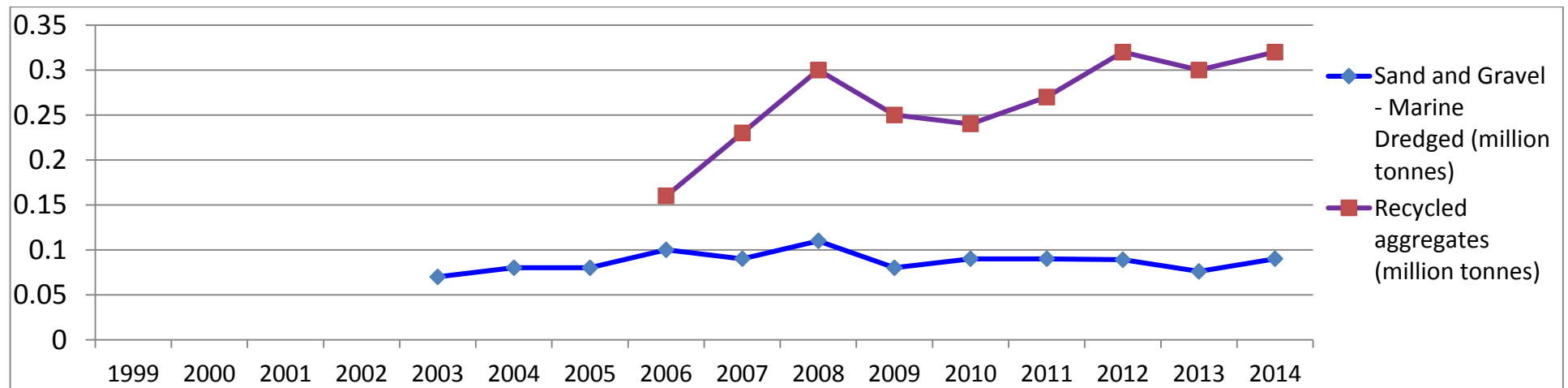
1.9.2. The following analysis reviews recent levels of supply of these types of aggregate and considers the likelihood of their supply being maintained.

Table 5 – Summary of Marine Dredged and Recycled Aggregate Supply

Aggregate types	1999	2000	2001	2002	2003	2004	2005	2006	2007	2008	2009	2010	2011	2012	2013	2014	10 YEAR AVERAGE	3 YEAR AVERAGE
Marine Dredged Sand and Gravel	Not available				0.07	0.08	0.08	0.10	0.09	0.11	0.08	0.09	0.09	0.09	0.08	0.09	0.09	0.09
Recycled aggregates	Not available							0.16	0.23	0.3	0.25	0.24	0.27	0.32	0.30	0.31	0.27	0.31

Notes.
 1) Figures in million tonnes per annum.
 2) Recycled Aggregate average figures only go back to 2006, and for 2013 and 2014 are **estimated** due to incomplete returns

Figure 4 - Historic Marine Dredged Aggregate and Recycled Aggregate Sales (mt)



1.10. Marine Dredged Aggregate

1.10.1. Marine dredged sand and gravel is extracted from the sea bed from licensed areas off the coast of Hampshire, the Isle of Wight and West Sussex. These deposits of marine aggregate (sand and gravel) are considered to be fluvial, fluvio-glacial, or beach deposits formed during glacial episodes within the last 2 million years when sea levels were lower. Mineral rights for marine sand and gravel are owned by the Crown Estate, and extraction can only take place following the award of a marine licence by the Marine Management Organisation.

Poole Wharf

1.10.2. The only wharf currently landing marine dredged aggregates is Poole Wharf, operated by CEMEX in the Port of Poole. Landings have been relatively constant at around 90,000 tonnes per annum and are shown in Table 5 and Figure 4. In 2014, 92,982 tonnes were landed at Poole Wharf, of which approximately 70% were consumed within Dorset. The ten year average of marine aggregate landings at Poole Wharf is approximately 89,500 tonnes, and the three year average is approximately 85,000 tonnes. Marine aggregate makes a relatively small contribution to the supply of aggregate in Dorset (less than 5% in 2014), and much of what is landed is likely to be used within Poole and Bournemouth.

Figure 5 – Licensed Dredging Areas

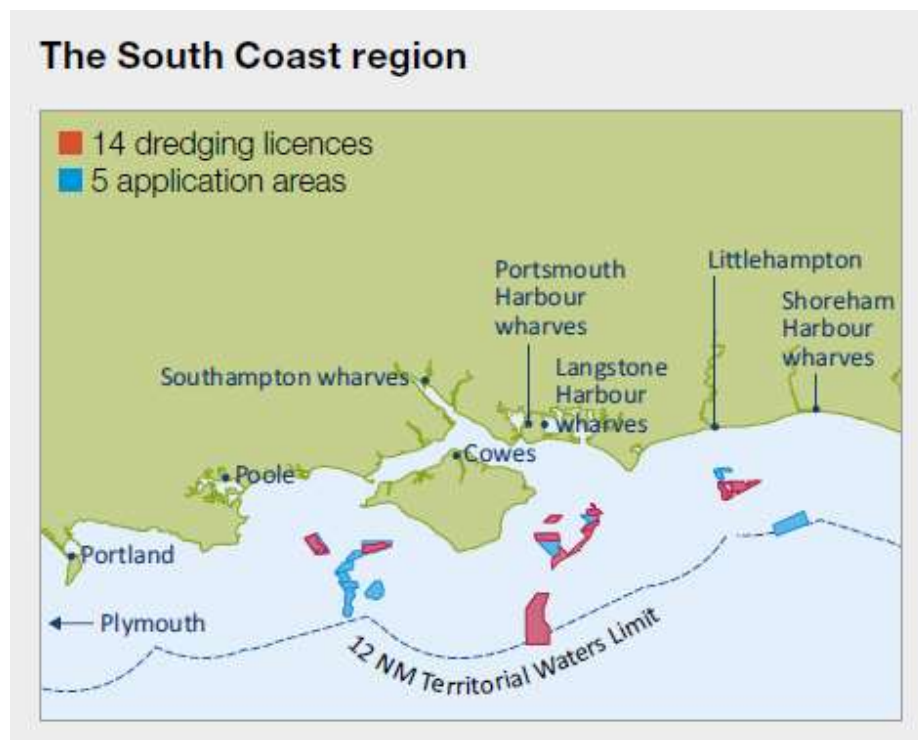
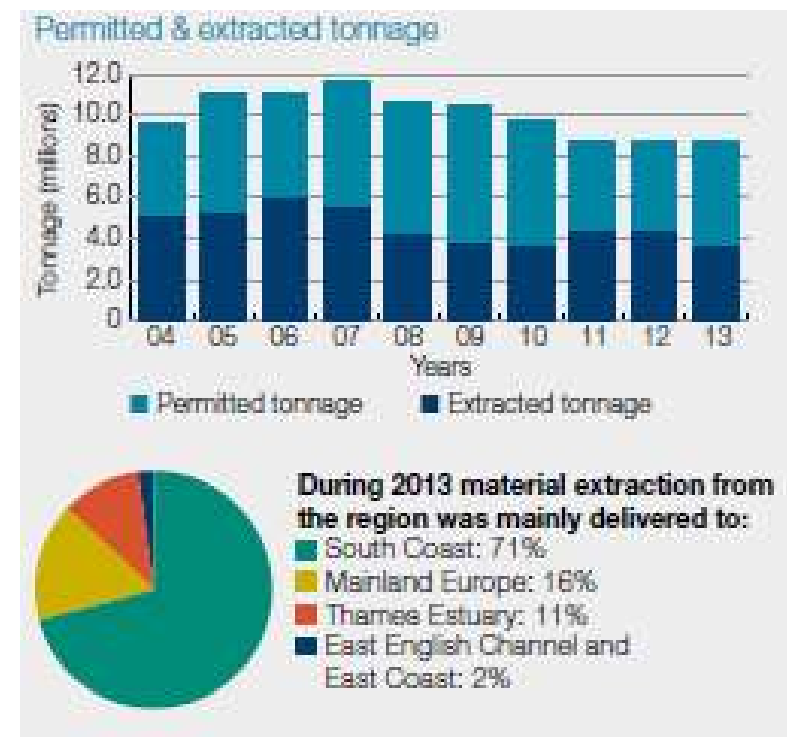


Figure 6 – Permitted and Extracted Tonnages



- 1.10.3. Larger amounts of marine aggregate are landed at the wharves in Hampshire (particularly Southampton) but it is not known whether any of this aggregate is exported to Dorset. The marine aggregate landed at Poole Wharf is from the South Coast dredging region. Figure 5⁴ illustrates the resource and licenced dredging areas closest to Dorset and Figure 6 shows, for the South Coast, that extracted tonnage is significantly less than extracted tonnage historically.

Constraints and Future Supply

- 1.10.4. The main constraints affecting future supply are the amount and availability of licensed areas for dredging and the capacity of the wharf to handle the material landed. As a relatively small wharf, capacity is limited. The wharf at Poole Port is safeguarded to protect its function. It has no planning restrictions regarding imports of aggregate. Capacity is influenced by factors such as the size and availability of dredgers, the permitted rates of dredging and then the capacity of the wharf to handle dredgers and the navigational restrictions.
- 1.10.5. Industry notes that while the wharf in Poole Harbour has some constraints (related to access to the berth, which requires supplying vessels to 'book in'), this is not believed to represent a constraint that limits the supply to the historic levels of around 90,000 tonnes. Instead, the level of supply provided relates to the scale of market demand that exists for marine products, compared to the wider portfolio of supply options. If the market demand altered or the balance of the supply portfolio changed, marine supplies could potentially play a larger role if required. It is understood from the operator that there is the potential for further tonnage to be landed should the market demand exist.
- 1.10.6. As shown in Figure 7, the Marine Aggregates Capability and Portfolio 2014 (Crown Estate) indicates that for the South Coast, the total current primary reserves (the current licensed production areas) are 84.35 mt, with a 10 year annual average offtake of 4.13 mt. This equates to a land bank of around 20 years, indicating that a continuation of supply (or even an increase, should the need arise) is expected to be possible from this source.

⁴ *Marine Aggregates – Capability and Portfolio: Crown Estate 2014*

Figure 7 – Marine Aggregates Regional Reserve Life

Region	Total current primary aggregate reserves	10 year average annual offtake	3 year average annual offtake	Peak average offtake during 10 year period	Annual permitted offtake (as at 31/3/2014)	Regional reserve life @ 10 year average annual offtake
		Primary (construction aggregate)				
Humber (including North East)	26.32	2.66	1.72	3.52	4.80	9.90
East Coast	85.76	6.18	4.36	8.54	9.69	13.87
Thames Estuary	15.15	0.85	0.83	1.74	1.36	17.87
East English Channel	96.45	2.16	3.76	4.32	9.80	44.65
South Coast	84.35	4.13	3.65	5.13	8.68	20.43
South West	11.43	1.30	1.02	1.77	2.21	8.78
North West	17.63	0.51	0.33	0.74	1.00	34.76
TOTAL	337.09	17.79	15.66	25.75	37.54	18.95

All figures are in millions of tonnes

1.11. Recycled Aggregates

- 1.11.1. Recycled aggregates are usually construction, demolition and excavation (CDE) wastes such as brick, concrete, soils and sub-soils and road planings which can be re-used as aggregate, usually after some form of processing. This processing can include screening, sorting, crushing, washing or blending with land-won aggregate. Processing generally takes place either at fixed recycling sites (including quarries) where the product is sold on the open market; or at construction sites, where the demolition or extraction waste is processed and either re-used on site or sold.
- 1.11.2. Recycled aggregates reduce the demand for land-won or marine aggregate, and have a range of uses, including bulk fill for construction projects or as base layers for roads and other built development. When recycled aggregate is blended with land won material, as referred to earlier, the resultant 'hybrid' material can be used for higher specification applications.

Figure 8 – Fixed Recycling Facilities 2014

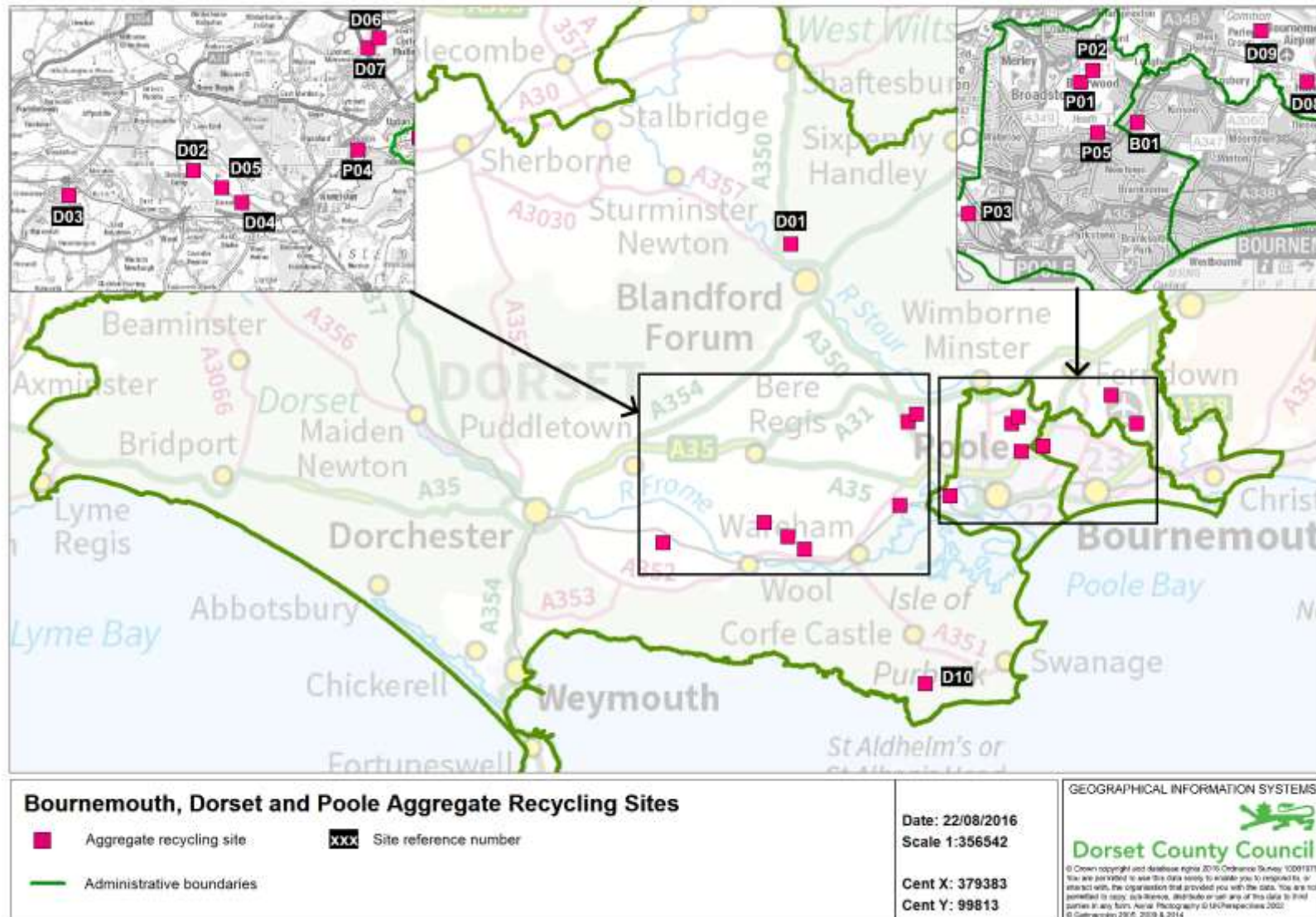


Table 6 - Recycled Aggregate sites

Ref no	Site Name	Site Operator	MPA
D01	Downend Farm, Blandford Forum	Mark Farwell Plant Hire Ltd	Dorset
D02	Spratley Wood, Puddletown Road	Mr P Andrews	Dorset
D03	Redbridge Road Quarry, Moreton	G Crook & Sons	Dorset
D04	Puddletown Road	A&D Skips	Dorset
D05	Masters Quarry, Puddletown Road	New Milton Sand & Ballast	Dorset
D06	Henbury Quarry, Wimborne	MB Wilkes Ltd	Dorset
D07	DCC Recycling site, Henbury (planings)	DCC	Dorset
D08	Hurn Court Farm, Christchurch	New Milton Sand & Ballast	Dorset
D09	Chapel Lane, Christchurch	Eco Sustainable Solutions	Dorset
D10	Swanworth Quarry, Purbeck	J Suttle Transport	
P01	Whites Pit Landfill Recycling Site	Commercial Recycling Ltd	Poole
P02	Canford Recycled Aggregates Washing Plant	Commercial Recycling Ltd	Poole
P03	Dawkins Road Rail Head	Hanson	Poole
P04	Holton Heath Trading Park, Poole	Wareham & Purbeck Skip Hire	Poole
P05	Manning's Heath Depot, Manning's Heath	J Suttle Transport	Poole
B01	Elliott Road Industrial Estate, Bournemouth	New Milton Sand & Ballast	Bournemouth

- 1.11.3. Although information on recycled aggregate sales is limited, nine years of survey data in Dorset is now available (see Table 5 and Figure 4) although some of the individual returns are estimated due to a lack of response from operators. In 2014 there were 17 known fixed aggregate recycling sites, as illustrated in Figure 8. Sales in 2014 were approximately 322,000 tonnes, although this figure is estimated as not all operators made returns. The ten year average of sales is approximately 270,000 tonnes per annum. In 2013, recycled aggregate sales fell, but have now increased again to 2012 levels.
- 1.11.4. In addition to these fixed recycling sites it is expected that a significant amount of recycled aggregate is produced at development/construction sites, using mobile crushing/processing plant. It is difficult to estimate how much this might be. Paragraph 4.31 of the Survey of Arisings and Use of Alternatives to Primary Aggregates⁵ suggests that of the total sales of recycled aggregate, some 80% is derived from fixed sites with an additional 20% from construction sites. Given that this report is dated 2007, it may be that the proportion from mobile plant is now even higher as plant efficiency increases. Applying an 80/20 split to the estimated 2014 BDP figures, sales in 2014 could have been as high as 400,000 tonnes.

⁵ Capita Symonds Ltd, in association with WRc plc. February 2007, Department for Communities and Local Government : London

Constraints and Future Supply

- 1.11.5. The total permitted capacity for aggregate recycling production is over 580,000 tonnes, above the level of current or average sales. There have been no recent new permissions. Existing recycling sites therefore have capacity to increase sales in response to demand, should this be required. Constraints to increasing sales include:
- availability of material to be recycled
 - distance to be travelled by the material to be recycled
 - distance to be travelled by the recycled aggregate, and
 - loss of aggregate recycling sites through site closure or ending of temporary planning permission without renewal or being made permanent.
- 1.11.6. Demand will be affected by the limited range of applications of the product, the availability/price of other sources of aggregate and whether recycled aggregate would be technically suitable for specific needs. As the 2014 Minerals Strategy encourages increased sales and permitted capacity far exceeds current supply, it is expected that supply will increase as dictated by market demand and subject to availability of material to be recycled.

1.12. Uses of Dorset's Aggregate Resource

- 1.12.1. Aggregates have a range of uses in construction, with Dorset's aggregates being primarily for concrete, road construction and road maintenance (including asphalt). Other uses include constructional fill and armourstone (crushed rock). The physical properties of some aggregates (e.g. strength, shape) make them more suitable for some uses than others – for example, most Dorset limestone is relatively soft and not suitable for road construction or concrete manufacture.
- 1.12.2. AM 2014 indicates that:
- for Dorset's land-won sand and gravel, the main uses are sand for concreting (54%) with gravel for concrete (17%) and sand for use in mortar (14%)
 - for Dorset's crushed rock, the main uses are other screened and graded aggregates (51%) and Type 1 and 2 uncoated roadstone (34%)
- 1.12.3. The marine dredged aggregate was primarily used as sand or gravel for concreting, primarily within Dorset or elsewhere in the South-West.

1.13. Imports and Exports from Dorset

- 1.13.1. This section of the report considers movement of aggregates, including movements between Dorset and other mineral planning authorities. The 2014 Aggregates Monitoring survey gives an indication of movements of aggregate out of Dorset to other areas.

Exports from Dorset

- 1.13.2. Table 7 shows that of the 1.73 mt locally produced land-won sand and gravel sold in 2014, 0.86 mt (50.6%) were consumed in Dorset; 0.58 mt (34%) were exported to Dorset's immediate neighbours, 0.15 mt were exported to the rest of the south west and 0.15 mt (6.7%) were exported

outside of the south-west (excluding Hampshire, which was included as one of Dorset's neighbours). This indicates that a relatively high proportion of land-won sand and gravel is exported from Dorset, primarily to its immediate neighbours, with a significant amount also going to SWE1, Avon.

- 1.13.3. For crushed rock and to a lesser extent marine dredged sand and gravel, a much higher proportion of what is produced in Dorset remains in Dorset. This is particularly true for crushed rock, with 97% of local production remaining within Dorset - the Jurassic limestone produced in Dorset is relatively soft and is used for lower specification uses. It does not travel far.

Table 7 – Destination of aggregates sold in Dorset

Aggregate Type		Total Sales	Dorset	Hampshire, Wiltshire, Somerset and Devon	Rest of South West	Outside South West (excluding Hampshire)
Land-won sand and gravel	mt	1.74	0.86	0.58	0.15	0.15
	%	100%	49.4%	33.6%	8.5%	8.5%
Crushed Rock	mt	0.28	0.27	0.008		
	%	100%	97.2%	2.8%		
Marine Dredged Aggregates	mt	0.93	0.67	0.02	0.26	0
	%	100%	72%	0.2%	28%	0

mt = million tonnes

Consumption within Dorset

- 1.13.4. Although the AM2014 report is not yet published, some preliminary information on consumption of sand and gravel and crushed rock within individual mineral planning authorities, and the origins of such material, has been made available by the British Geological Survey⁶.
- 1.13.5. In 2014, Dorset consumed 800,000 tonnes of land-won and marine dredged sand and gravel - not including aggregate sold for non-aggregate uses i.e. industrial, agricultural, sports uses. Some 80-90% (up to 720,000 tonnes) of this was produced within Dorset, with 10% to 20% (up to 144,000 tonnes) coming in from Hampshire. Dorset is largely self-sufficient in land-won sand and gravel, and it is expected that the imports from Hampshire are supplying those areas close to the county boundary.
- 1.13.6. Similarly, in 2014 Dorset consumed 531,000 tonnes of crushed rock, of which Dorset produced approximately 51% and Somerset supplied approximately 49%.

⁶ AM2014 source of primary aggregates by sub-region – percent categories (British Geological Survey, 2016)

1.14. Future Demand

- 1.14.1. It is considered that aggregates are primarily used in construction of new infrastructure and other built development, along with the maintenance of existing infrastructure. Future demand for aggregates will therefore be influenced by future levels of construction activity, including new development and maintenance of existing infrastructure.
- 1.14.2. Dorset is affected by demand both within and outside of the Mineral Planning Authority - overall land-won sand and gravel sales for the south west sub-national area has declined from 5,791,000 tonnes in 2001⁷ through to 5,264,000 tonnes in 2005 to 3,638,000 tonnes in 2009. This represents a 37% decline, compared to a 22% decline for Dorset for the same time period. The reason for Dorset's maintenance of sales, compared with the fall outside of Dorset, is not clear but could be due to various factors including the fact that Dorset is a supplier of aggregate (particularly Poole Formation sand) to other parts of the country such as south-east England, including London, and elsewhere in the south west. This analysis will be updated following the publication of the 2014 Aggregate Minerals Survey.

Built development.

- 1.14.3. To help assess the future demand for aggregates this section looks at recent and proposed housing development and other major infrastructure proposed in the sub region. Housing is a significant user of the county's aggregates. This is likely to continue over the next decade. Table 8 below shows the levels of housing development that have been proposed in the Councils' adopted Plans. Although the plans cover different time periods they give a good indication of the levels of housing development anticipated over the next 10 years at least.
- 1.14.4. Across the area as a whole, some 2,976 new dwellings are planned per annum. This figure may change, possibly rising in coming years as Plans are reviewed in line with the requirements of the National Planning Policy Framework to meet the "objectively assessed need" for housing in the area.

Table 8 - Proposed Housing Development in Local Plans / Development Plan Documents in Bournemouth, Dorset and Poole

Local Authority	Local Plan / DPD	Status	Plan period	Total Proposed dwellings	Annual average rate (dwells per annum)	Comments
Bournemouth Borough Council	Bournemouth Core Strategy	Adopted 2012	2006 – 2026	14,600	730	Review underway
Borough of Poole	Poole Core Strategy	Adopted 2009	2006 – 2026	10,000	500	Review underway.
Christchurch Borough Council + East Dorset District Council	Christchurch and East Dorset Core Strategy	Adopted 2014	2013 – 2028	8,490	566	
North Dorset District Council	North Dorset Local Plan Part 1	Adopted 2016	2011 – 2031	5700	285	

⁷ Collation of the results of the 2001 Aggregate Mineral Survey for England and Wales (Prepared by British Geological Survey on behalf of ODPM 2001). Similarly for the 2005 and 2009 reports, though these were commissioned by Department for Communities and Local Government.

Local Authority	Local Plan / DPD	Status	Plan period	Total Proposed dwellings	Annual average rate (dwells per annum)	Comments
Purbeck District Council	Purbeck Local Plan Part 1	Adopted 2012	2006 - 2027	2,520	120	Review underway.
West Dorset District Council + Weymouth and Portland Borough Council	West Dorset, Weymouth and Portland Local Plan	Adopted 2015	2011 – 2031	15,500	775	
Bournemouth, Dorset and Poole				56,810	2,976	

Source: Dorset County Council Economy and Enterprise - BDP Local Plan/Core Strategy Monitoring.

Historic Levels of Development.

- 1.14.5. Table 9 shows the historic levels of housing development in Dorset over the 10 years 2005/6 – 2014/15. Over this 10 year period the average annual level of net dwelling completions across the three authorities is 2,497.
- 1.14.6. When the figures are considered in more detail a sharp divide can be seen in the level of development pre and post 2009 when the housing recession really began to bite in Dorset. Completions pre 2009 were over 3,000 every year, hitting 3,700 in 2005/6, whereas from 2009/10 onwards they have fallen below 2000 dwellings per annum. The three year average rate of completions for 2012/13-2014/15 is 1847 dwellings. This is some 26% down on the 10 year average.
- 1.14.7. The higher rates of development seen in the earlier part of the decade indicate that, if the level of housing development does rise again in the future, the aggregate industry should be able to accommodate levels of 3,500 dwellings per annum over a period of several years as it has met demand at this level in the past. However, it will be important to keep monitoring the situation so that adjustments can be made to the apportionment figures if shown to be necessary.
- 1.14.8. For comparison, figures for annual sand and gravel sales, from 2005 to 2014, have been added to Table 9. They demonstrate some level of correlation between housing completions and aggregate sales, although there is often a bit of a lag.

Table 9 - Net Annual Completions

Local Authority	2005/06	2006/07	2007/08	2008/09	2009/10	2010/11	2011/12	2012/13	2013/14	2014/15	2005/6-2014/15	10 YR AV	2012/13-2014/15	3 YR AV
Christchurch	132	128	190	101	102	103	62	71	149	154	1,192	119	374	125
East Dorset	172	128	163	116	70	157	107	61	156	180	1,310	131	397	132
North Dorset	554	270	194	207	192	272	375	144	227	178	2,613	261	549	183
Purbeck	161	187	208	194	164	77	107	79	72	67	1,316	132	218	73
West Dorset	564	517	345	383	204	330	377	366	259	251	3,596	360	876	292
Weymouth and Portland	359	188	275	410	150	130	169	204	113	148	2,146	215	465	155
DORSET	1,942	1,418	1,375	1,411	882	1,069	1,197	925	976	978	12,173	1217	2879	960
Bournemouth	960	1,089	1,534	1218	622	492	555	639	394	964	8,467	847	1997	666
Poole	828	666	619	685	421	257	187	208	257	199	4,327	433	664	221
Totals	3,730	3,173	3,528	3,314	1,925	1,818	1,939	1,772	1,627	2,141	24,967	2497	5540	1847
Sand and gravel sales (mt)	1.71	1.8	1.56	1.67	1.26	1.41	1.52	1.43	1.60	1.73				

Source: Dorset County Council, Economy and Enterprise - Residential Land Monitoring Records, January 2016.

Projected Development beyond current Plan periods

- 1.14.9. It is not yet known with certainty what level of development will be built beyond the proposals in the current Local Plans. A key objective of national planning policy as set out in the National Planning Policy Framework is to “boost significantly the supply of housing”. To that end local authorities should make objective assessments of housing need, working jointly with neighbouring authorities who share the same housing market area.
- 1.14.10. West Dorset and Weymouth and Portland Councils completed their Strategic Housing Market Assessment (SHMA) in 2014. Their Local Plan is based on the findings of this assessment. However the Inspector examining their Plan noted that the authorities would need to undertake an

early review of their housing situation – particularly looking at future needs in Dorchester and development opportunities in Sherborne. It is anticipated that this could lead to an increase in the overall supply in this HMA in the next few years.

- 1.14.11. Considering the broad distribution of future development, it is likely that the main focus will be in and around Poole and Bournemouth. The Dorset Local Enterprise Partnership’s Strategic Economic Plan proposes major economic development at Aviation Park at Bournemouth Airport and mixed development in the regeneration of the Port of Poole. A major urban extension of almost 1,000 dwellings is also proposed at north Christchurch. These proposals together with development around the two Universities in Bournemouth and Poole will help to stimulate the urban economy. Elsewhere a major urban extension (1800 dwellings) is proposed in Gillingham in the north of the County and over 1200 dwellings in and around Wimborne in the east. In the west, Dorchester will be the main focus of development with around 1900 dwellings currently allocated and extensions on the edge of Weymouth will also boost that town’s growth by around 1300 dwellings.

Table 10 - Bournemouth, Dorset and Poole - Projected development beyond current Plans

Local Authority	Plan period	Total dwellings proposed (net).	Average annual rate (dpa).	Objectively Assessed Need 2013-2033 in Eastern Dorset + WDWP SHMAs (av dpa)	Neighbourhood Plans - possible housing over and above current Local Plans (av dpa) *
Christchurch +	2013-28	8490	566	626	
East Dorset					
North Dorset	2011-31	5700	285	330	36
Purbeck	2006-27	2520	120	238	
West Dorset + Weymouth and Portland	2011-31	15,500	775	775	12
DORSET		32210	1746	1969	48
Bournemouth	2006 - 26	14,600	730	979	
Poole	2006-26	10,000	500	710	
Total BDP		56810	2976	3658	48

* Includes average development rates proposed in those NPs where a draft Plan has been published

- 1.14.12. There are no proposed major infrastructure proposals identified within Dorset in the National Infrastructure Plan (December 2014). Both the Strategic Economic Plan “Transforming Dorset” prepared by the Dorset Local Enterprise Partnership and the Implementation Plan 2 (2014 – 17) of the Bournemouth, Dorset and Poole Local Transport Plan 3 highlight two major infrastructure projects planned in the next five years:

- Unlocking the potential of “Aviation Park” at Bournemouth Airport - a 59 hectare site for employment use with the potential to create 16,000 new jobs, by improvements to the A338 Spur Road and other local road improvements;
- Completion of the regeneration of the Port of Poole with the potential to accommodate 5,000 jobs and 2,000 homes by improvements to the highway network to supplement the completion of the Twin Sails Bridge in 2011, including improvements to the port and regeneration area.

1.15. Maintaining Supply

- 1.15.1. Minerals can only be worked where they are found and much of Dorset’s environment is highly protected and under pressure from a range of other uses/constraints. Environmental designations (including European, national and local), landscape designations and other designations (e.g. the World Heritage Site) all restrict minerals development. Similarly, the water environment (including floodplains, Source Protection Zones, aquifers, groundwater depth and geology) can also restrict development. Minerals development has the potential to significantly affect settlements and tourism interests, although impacts should be mitigated if the development is properly located, designed and managed. However, the level of settlement and tourist interest in Dorset does have a limiting effect on minerals development.
- 1.15.2. The ability to deliver the levels of aggregate provision identified in the Minerals Strategy 2014, particularly regarding provision of land-won sand and gravel and crushed rock, will be rigorously tested during the preparation of the Mineral Sites Plan. In order to respond to unforeseen rises in demand for sand and gravel and crushed rock, the 2014 Minerals Strategy will be subject to robust monitoring of all policies so that sales can be related to supply/demand and the effectiveness of the policies at delivering minerals for BDP and surrounding areas can be continuously assessed. The LAA will specifically monitor aggregates sales and landbanks. If monitoring indicates that Policy AS1 is failing to meet demand, this could trigger a review of the Minerals Strategy or the relevant parts of it.

Capacity and Constraints

- 1.15.3. Individual sites have limits placed on their working by the planning permission under which they are worked. As with other aggregate sources, sales of sand and gravel are market driven, with increased demand leading to increased supply. In periods of lower economic growth and demand for construction, there will be less development of sand and gravel sites and lower production at such sites.
- 1.15.4. The landscape and environmental sensitivity of BDP also set limits on the development of mineral sites. Policy AS1 of the 2014 Minerals Strategy notes that:
- Sites will only be considered where it has been demonstrated that possible effects (including those related to hydrology, displacement of recreation, species, proximity, land management and restoration) that might arise from the development would not adversely affect the integrity of the Dorset Heaths SAC, Dorset Heathlands SPA and Dorset Heathland Ramsar site either alone or in combination with other plans or projects.*
- 1.15.5. Environmental and landscape constraints could act to limit production. A lack of landowners willing to release their land for aggregates development could also be a constraint. In such a case there would need to be a reassessment of the provision for sand and gravel sales but it is not expected that these issues will threaten sales in the near future. This will become clearer as the sites identified for possible inclusion in the Mineral Sites Plan undergo sustainability appraisal.

1.16. **Final Comment**

- 1.16.1. It is considered that all sources of aggregate demonstrate capacity for some increase in supply, should demand increase, and no sharp increases in demand are expected in the next year. In the longer term, there are adequate landbanks for sand and gravel and crushed rock. The emerging Mineral Sites Plan seeks to identify and allocate adequate new sites to maintain production and sales. If for some reason it proves impossible to maintain supply, the strategy for mineral provision will have to be re-visited. It is therefore considered that it is appropriate to continue to use the 10 year average figure, as set out in this Local Aggregates Assessment, to establish the size of the landbank and level of provision for both sand and gravel and crushed rock.

Appendix 1

A.1. The Tables below show the various aggregate producing/handling facilities in Bournemouth, Dorset and Poole, both active and inactive, in 2014.

Land Won Sand and Gravel Quarries – operational in 2014 (see Figure 1 for locations)			
MPA	Quarry	Site Operator	Mineral
DCC	Warmwell Quarry	Aggregate Industries	Sand
DCC	Tatchell's Quarry	Aggregate Industries	Sand
DCC	Masters Pit	Holme Sand and Ballast	Sand
DCC	Dorey's Pit	Ball Clay site – worked by Imerys ⁸	Gravel
DCC	Binnegar Quarry	Raymond Brown	Sand
DCC	Henbury Quarry	M B Wilkes	Sand
DCC	Trigon Pit	Ball Clay site – worked by Imerys ⁹	Primarily Sand, some Gravel
DCC	Chard Junction Quarry	Aggregate Industries	Sand and Gravel
DCC	Woodsford Quarry	Hills Aggregates	Sand and Gravel
DCC	Hurn Court Farm	New Milton Sand and Ballast	Sand and Gravel
DCC	Moreton Pit	G Crook and Sons	Sand and Gravel

⁸ Output is taken to Masters Pit (Holme Sand and Ballast) and processed there.

⁹ Output is sold separately by landowner.

Land Won Sand and Gravel Quarries – inactive in 2014

MPA	Quarry	Site Operator	Mineral Handed/Produced
DCC	Hyde Pit	Hanson Aggregate	Sand
DCC	Hines Pit	Hanson Aggregate	Sand
DCC	Avon Common	Tarmac	Sand and Gravel

Crushed Rock Quarries – operational in 2014 (see Figure 1 for locations)

MPA	Quarry	Site Operator	Mineral Handed/Produced
DCC	Swanworth Quarry	Suttle Quarries	Crushed Rock, some dimension stone
DCC	Admiralty Quarry	Worked by G Crook and Sons	Crushed rock (cherty series)
DCC	Perryfield Quarry	Worked by Portland Stone Ltd	Crushed rock

Known Recycled Aggregate Facilities – operational in 2014

MPA	Site	Site Operator
Borough of Poole	Canford Recycled Aggregates Washing Plant	Commercial Recycling Ltd
Borough of Poole	Whites Pit Landfill Recycling Site	
Borough of Poole	Dawkins Road Rail Head	Hanson
Dorset County Council	Downend Farm, Blandford Forum	Mark Farwell Plant Hire Ltd
Bournemouth Borough Council	Elliot Road Industrial Estate, Bournemouth	New Milton Sand & Ballast
Dorset County Council	Puddletown Road	A + D Skips

Known Recycled Aggregate Facilities – operational in 2014

Dorset County Council	Henbury Quarry, Wimborne	M B Wilkes Ltd
Borough of Poole	Holton Heath Trading Park, Poole	Wareham & Purbeck Skip Hire
Dorset County Council	Redbridge Road Quarry, Moreton	G Crook & Sons
Dorset County Council	Chapel Lane, Christchurch	Eco-Sustainable Solutions
Dorset County Council	Hurn Court Farm, Christchurch	New Milton Sand & Ballast
Borough of Poole	Manning's Heath Depot, Manning's Heath	J Suttle Transport
Dorset County Council	Masters Quarry, Puddletown Road	New Milton Sand & Ballast
Dorset County Council	Spratley Wood, Puddletown Road	Mr P Andrews
Dorset County Council	Dorset County Council Recycling	Dorset County Council
Dorset County Council	Swanworth Quarry	J Suttle Transport Ltd

Aggregate Wharves and Rail Depots

MPA	Site	Site Operator	Mineral Handled/Produced
Borough of Poole	CEMEX Aggregates Wharf	CEMEX	Marine Dredged sand and gravel
Borough of Poole	Dawkins Road Rail Depot, Hamworthy, Poole ¹⁰	Hanson	Crushed Mendips rock
DCC	Wool Sidings, Wool.	Aggregate Industries	Sand from Warmwell Quarry

¹⁰ This site was not operational in 2014.