

**SOUTH WALES
REGIONAL AGGREGATES
WORKING PARTY**

**ANNUAL REPORT
2007**

This report contains statistics on aggregate sales in the calendar year 2007

The statistics and statements contained in this report are based on information from a large number of sources and are compiled to an appropriate level of accuracy and verification. Readers should use corroborative data before making major decisions based on this information.

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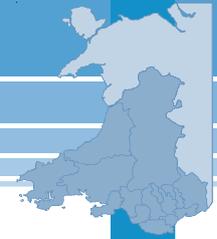
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South Wales Regional Aggregates Working Party - Annual Report 2007

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1. INTRODUCTION

1.1. This report has been prepared by the South Wales Regional Aggregate Working Party (SWRAWP) and gives the results of the Annual Survey for the calendar year of 2007 in the South Wales region. Each year, the SWRAWP co-ordinates the aggregate sales information received from all mineral operators via the eighteen mineral planning authorities which make up the South Wales region (see Appendix B). The work of the SWRAWP has been funded by the National Assembly for Wales since April, 2002.

1.2. The collated information in this report is used as a major contribution to the ongoing study of supply and demand patterns, which provides a vital input to the monitoring and review of the Welsh Assembly Governments' supply and demand policy for aggregates which is enshrined in the Minerals Technical Advice Note (MTAN 1) relating to Aggregates and Minerals Planning Policy Wales. Such information is also useful to Mineral Planning Authorities in carrying out their statutory functions in respect of the preparation of local development plans and the determination of planning applications. The information is also made available to the general public and industry, the latter of which use it to plan new developments and investments.

1.3. The QPA, on behalf of its members, relaxed the longstanding three company confidentiality rule. The BAA have also followed suit but their membership is relatively small. This rule ensured that data would not be published if it related to less than three companies, unless the companies concerned had given written permission otherwise. Nonetheless, as non-QPA members are still protected by the old rule, it has still been necessary to amalgamate a large amount of data to maintain confidentiality. This is particularly so in relation to areas like Carmarthen, Ceredigion and Powys, where there are a significant number of small operators.



2. SOUTH WALES REGIONAL AGGREGATES WORKING PARTY

2.1. The twelve Regional Aggregates Working Parties (RAWPs) in England and Wales provide information and advice to the Department of Community and Local Government and to the First Secretary of the Welsh Assembly Government in the supply of and the demand for, aggregate minerals. The National Co-ordinating Group (NCG) provides a national forum of discussion of work undertaken by the RAWPs.

2.2. The South Wales Regional Aggregates Working Party is a technical working group with membership drawn from officers of the 18 Mineral Planning Authorities, representatives of the Quarry Products Association (QPA) which is the trade association of the aggregates industry, the British Aggregates Association (BAA), the construction/demolition industry, the DCLG and Welsh Assembly Government, the Crown Estate, the Farming and Rural Conservation Agency, Environment Agency, CCW, National Ash, Welsh Environmental Trust and the British Geological Survey. A list of current members is shown in Appendix B.

2.3. Only one meeting of the South Wales RAWP was held in 2007, together with 3 sub-group meetings to consider the Regional Technical Statement (RTS). One Member Forum meeting was also held to consider progress on the Regional Technical Statement (RTS). A provisional completion date for the issue of the RTS has now been set for September 2008.

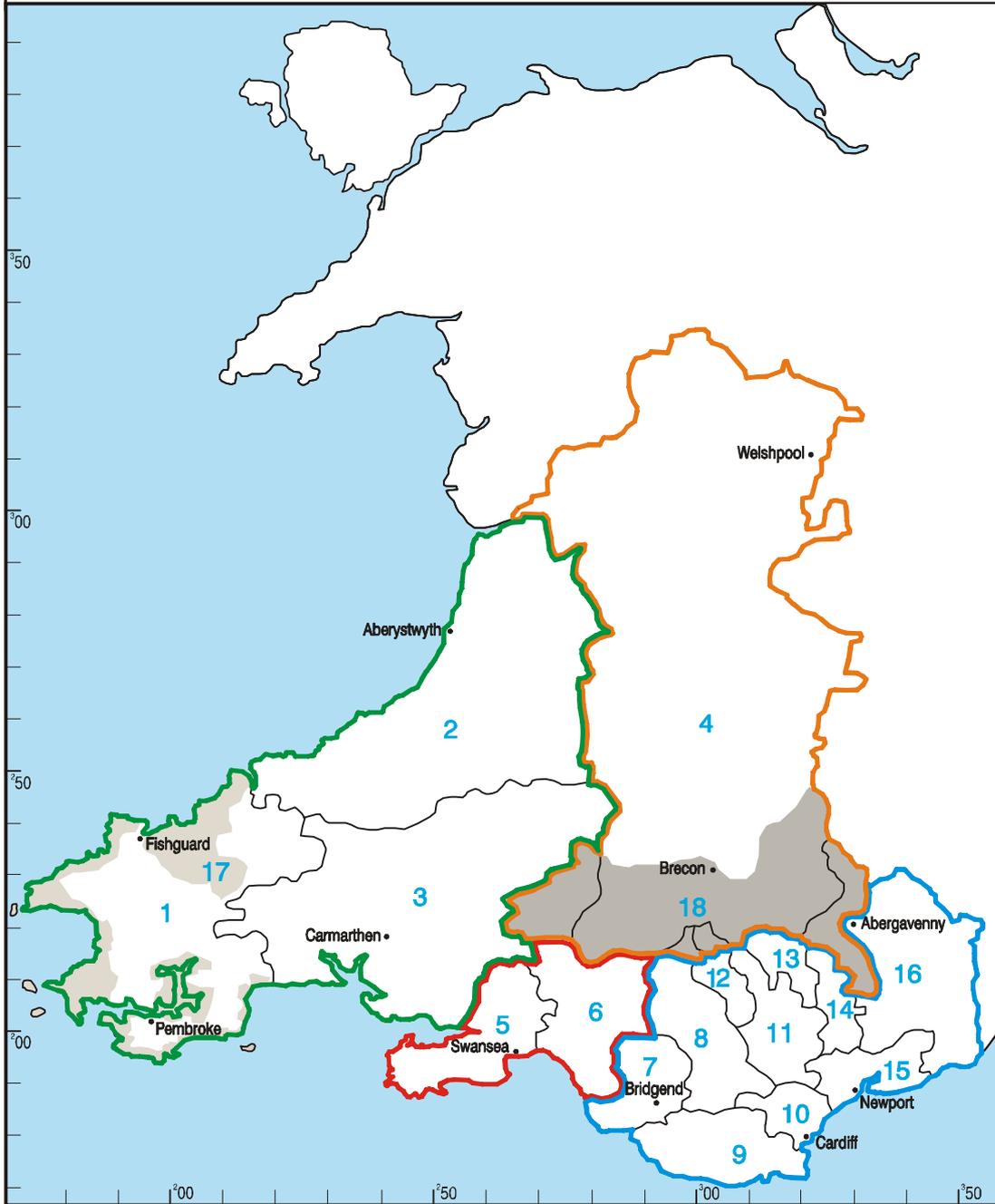
2.4. The Chairman/Secretary of SWRAWP attended a significant number of steering group meetings relating to the following research projects:-

- (i) EU mining waste directive;
- (ii) Construction and demolition waste survey - Environment Agency; and
- (iii) Evaluation of the RAWP's - Capita Symonds.

The secretary has also maintained close liaison with the Welsh Environment Trust's new postholder responsible for a 4 year contract (ceases 2009) to promote the use and markets for construction and demolition waste in Wales. This post is funded by the Aggregates Levy fund.



MAP 1
S.W.R.A.W.P. Mineral Planning Authorities



Unitary Authorities

- | | |
|-----------------------|----------------------|
| 1. Pembrokeshire | 9. Vale of Glamorgan |
| 2. Ceredigion | 10. Cardiff |
| 3. Carmarthenshire | 11. Caerphilly |
| 4. Powys | 12. Merthyr Tydfil |
| 5. Swansea | 13. Blaenau Gwent |
| 6. Neath-Port Talbot | 14. Torfaen |
| 7. Bridgend | 15. Newport |
| 8. Rhondda-Cynon-Taff | 16. Monmouthshire |

Old County Collation Boundaries

- | | |
|------------------------------------------------------------------------|---------------------------------------------------------------------|
| — West Glamorgan | — Dyfed |
| — Powys (incl Brecon Beacons.N.P.) | — Mid & South Glamorgan and Gwent |

17. Pembrokeshire Coast National Park

18. Brecon Beacons N.P.



3. CRUSHED ROCK

3.1. The results of the 2007 survey are as follows:-

	Coated Roadstone	Uncoated Roadstone	Concrete Aggregate	Fill/Other Construction Aggregate	Rail Ballast	Total ¹ Aggregate	Building Stone	Non ² Aggregates
Limestone	0.67	2.05	2.30	2.66	} 0.16	7.80	0.02	1.20
Sandstone	2.02		} 0.33	} 1.87		3.39	} 0.17	} 0.25
Igneous	0.49					1.32		
Total	2.57	2.66	2.63	4.63	0.16	12.51	0.19	1.45

¹ Includes unknown end uses. ² Includes Building Stone.

Figures may not balance exactly due to rounding off, and the lack of information regarding the breakdown of end-use.

Former County (approx.)	Mineral Planning Authority	Crushed Rock Sales 2005	Crushed Rock Sales 2006	Crushed Rock Sales 2007	Reserves at 31.12.07 ¹	Landbank of ² Reserves (years)	
Powys	Brecon Beacons National Park	} 3.00	} 3.30	} 3.20	} 17242	119	
	Powys						
Dyfed	Carmarthenshire	} 2.66	} 1.90	} 3.27	133.00	81	
	Ceredigion				9.00	46	
	Pembrokeshire County Council				29.00	} 145.93	28
	Pembrokeshire Coast N.P.				7.00		27
West Glamorgan	Neath-Port Talbot	}	}	}	}	}	
	Swansea						
Mid & South Glamorgan And Gwent	Blaenau Gwent	} 1.25	} 1.28	} 1.80	} 121.85	} ³	
	Merthyr Tydfil						
	Monmouthshire	} 5.19	} 6.26	} 6.04	} 244.00		
	Newport						
	Torfaen						
	Bridgend						
	Caerphilly	36.00	46				
	Cardiff	43.45	46				
R.C.T.	14.50	20					
Vale of Glamorgan	20.00 ¹	14					
Total		10.85	11.46	12.51	554.18 ¹		

¹ The majority of non-aggregate reserves are located in the Vale of Glamorgan and these have been excluded from reserve figures. In other authorities, aggregate reserve figures may include some non-aggregate reserves. It is important to note that some non-aggregate reserves may contain aggregate reserves and vice versa.

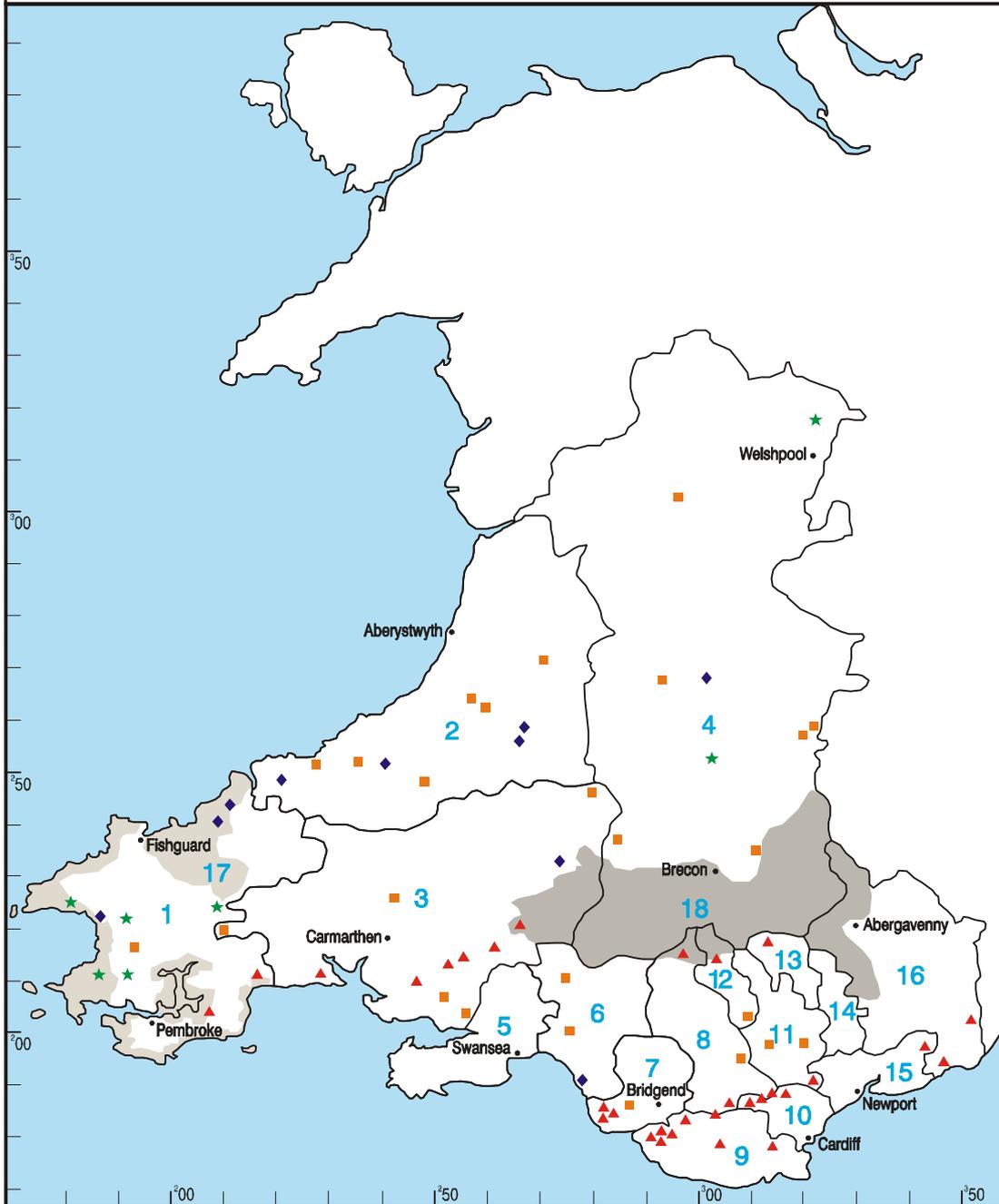
² Crushed rock landbanks are determined using the average production figures over the last 3 years, 2005-2007 and dividing the reserves by the annual average production.

³ Average reserve figures cannot be calculated as information is subject to confidentiality rules.



MAP 2

Primary Aggregates Production Sites - 2007 (excluding marine)



Unitary Authorities

- | | |
|-----------------------|----------------------|
| 1. Pembrokeshire | 9. Vale of Glamorgan |
| 2. Ceredigion | 10. Cardiff |
| 3. Carmarthenshire | 11. Caerphilly |
| 4. Powys | 12. Merthyr Tydfil |
| 5. Swansea | 13. Blaenau Gwent |
| 6. Neath-Port Talbot | 14. Torfaen |
| 7. Bridgend | 15. Newport |
| 8. Rhondda-Cynon-Taff | 16. Monmouthshire |

Primary Aggregates

- | | |
|-----------------------------|---------------|
| Limestone | Igneous |
| Sandstone (including shale) | Sand & Gravel |

17. Pembrokeshire National Park

18. Brecon Beacons N.P.



LANDBANKS

3.2. A landbank is a stock of planning permissions for the winning and working of minerals. The landbank figures have been calculated according to the method set out in MTAN 1 (Wales), except that no allowance has been made for the demand trend i.e. they have been calculated using the average of the last three years production. The permitted reserves are those estimated to be available for the production of aggregates. Where operators did not provide information on aggregate sales, best estimates have been made from the knowledge of mineral planning officers and any past returns.

3.3. Caution must be exercised in using these landbank figures. The landbank calculation does not take account of operational aspects which may restrict the availability of certain types of reserves. Also the reserves in many cases, have been estimated using limited sampling and testing information and the marketing conditions prevailing at the time and may be subject to revision.

3.4. A survey of inactive/dormant sites to ascertain the likelihood of reactivation was carried out in 2005. A number of criteria were used to determine whether or not the sites may usefully be ignored for the purposes of defining an active landbank. The results indicate that there were 128 million tonnes of reserves in this category of which 47 million tonnes (37%) could be considered unlikely to reactivate. These results have been incorporated into the RTS process.

3.5. It is important to note that reserves earmarked as being suitable for aggregates may also be suitable for non-aggregates. Many carboniferous limestone hard rock quarries produce significant amounts of rock suitable for both uses and these may change with market demand. Whilst many quarries may have less than 10% non-aggregates, some may have up to 50%. Reserve figures have also for the majority of cases been based on annual survey returns from operators or in the absence of returns, estimates have been made.

CRUSHED ROCK SALES

3.6. Sales of crushed rock have increased by 1.05 million tonnes (+9%). Limestone sales increased by 810,000 tonnes (+12%); Sandstone sales increased slightly by 40,000 tonnes (+1%); and Igneous sales increased by 200,000 tonnes (+18%). Total sales in 2007 amount to 12.51 million tonnes, the largest sales figure for the ten years. Limestone sales continue to dominate the sales figures accounting for 62% of the market. Sandstone sales account for 27% of the market.

SALE OF ROCK BY END USE

3.7. Coated roadstone accounted for 20% of the market; Uncoated roadstone 22%; Concrete 22% and Fill 36%. The first three categories therefore demonstrate a remarkably equitable share of the market with Fill accounting for the major share. Comparison with 2006 indicates Fill accounting for 43% of the market with the other categories more or less the same.

SAND AND GRAVEL BY END USES (LAND-WON)

3.8. Unfortunately, due to very poor responses the information available is too limited and unreliable to provide a breakdown by end use.

3.9. It should be noted that the main sources of land won sand and gravel are in West Wales with the main sources being Ceredigion, Pembrokeshire (including the Pembrokeshire Coast National Park), and Neath.

MARINE SAND AND GRAVEL

4.0. A comparison of the statistics for 2006/2007 indicate there was a 11% increase in the tonnage of sand and gravel landed in 2007 (from 951,968 to 1,070,981). There were significant increases in tonnages landed at Burry Port 16% (24k), and Newport 16% (37k), and Swansea 39% (48k). Neath experienced an 8% decrease of 16k.



4. SAND AND GRAVEL

4.1. The results of the 2007 survey are as follows:-

Former County(approx.)	Mineral Planning Authority	Land Won Aggregates	Reserves
Dyfed	Carmarthenshire County Council	0.23	10.39
	Ceredigion C. C.		
	Pembrokeshire County Council		
	Pembrokeshire Coast National Park		
West Glamorgan	Neath-Port Talbot County Borough Council	0.01	0.36
Powys	Powys County Council		
Mid & South Glamorgan And Gwent	Bridgend County Borough Council		
Total		0.24	10.75

Building/Soft Sand for Coating for Asphalt/Mortar	0.08
Concreting/Sharp Sand	0.05
Gravel - Concrete Aggregates, Other Uses	0.04
As Raised Material for Constructional Fill/Unknown	0.07
Total	0.24

Mineral Planning Authority	Landing Port	2006 Tonnages	2007 Tonnages
Vale of Glamorgan Council	Barry	0	0
Neath-Port Talbot County Borough C.	Briton Ferry/Port Talbot	196,503	180,461
Carmarthenshire County Council	Burry Port	119,360	143,550
Cardiff Council	Cardiff Docks	311,009	330,291
Pembrokeshire County Council	Pembroke Docks	54,034	60,267
Newport County Borough Council	Newport	196,503	233,770
Monmouthshire	Newport/Chepstow	1	1
Swansea City County Council	Swansea	74,559	122,642
Total		951,968	1,070,981

1 No statistics as not within Crown Estate area.



5. SECONDARY AGGREGATES

Table 6
Secondary Aggregate Sales (million tonnes) 2007

Mineral Planning Authority	Type	Roadstone Coated/ Uncoated Concrete Aggregate, Artificial Aggregate	Other Construction Uses (incl. cement)	Total	Reserves at 31.12.06
Newport Neath-Port Talbot Cardiff	Steel/Blast Furnace Slag	0.68	0.84	1.52	22.10
Vale of Glamorgan	PFA/FBA				
Pembrokeshire County	Slate Waste				

1 Reserve figures do not include all waste materials or industrial by-products suitable and available for aggregate uses in 2006 but only statistics on the reserves of material saleable as aggregates in stockpiles and waste tips with planning permission for extraction.

5.1. Responses were received from ten of the fifteen local highway authorities throughout South Wales on the arisings/recycling of road planings. This represents a 66% response rate. 121,863 tonnes of arisings were recorded of which 104,799 tonnes (85%) was recycled. Most of this recycled material was used for low grade end uses such as improvements to roads in rural areas, cycle tracks, sub-base fill, farm lanes, private roads and footpaths. The majority of the material recycled was asphalt. Very little material was kept in stock.

5.2. 11,000 tonnes of road planings were landfilled and the amount in stockpiles was 18,237 tonnes. No reasonable comparison can be made with previous years due to the relatively poor response.

5.3. One of the issues identified still is that LA's are not in control of the destination of road planings as this decision is usually left to the contractor carrying out the work. The WET (Welsh Environment Trust) are currently liaising with LA Highway departments to ensure procurement systems control and use of the planings.

5.4. WET consider markets for the secondary aggregates will decrease with the major downturn in the economy which is predicted to last a minimum of two years. Whilst they are currently being utilised for low end uses, there may be a rising amount of higher end uses but not in the immediate future.

5.5. The WET report (2007) key (headline) figures can be found in Appendix E.



6. GUIDELINES FOR AGGREGATES PROVISION IN SOUTH WALES (UPDATE)

6.1. Work commenced on the Regional Technical Statement (RTS) in 2005 with a view to achieving a more sustainable regional mineral planning approach to the supply of aggregates in South Wales. At present, the RTS has been endorsed by Members of all authorities with the exception of Torfaen but not formally issued. Issue will take place once the NWRAP are able to finalise their RTS so that both can be issued together. RTS documents may be viewed on the SWRAWP website: swrawp-wales.org

6.2. A number of research projects have been implemented to feed into the development of the mineral policy/guidance framework. These are as follows:-

- (i) Crushed Rock Sand: A reconnaissance survey (2000);
- (ii) South Wales Sands and Gravel: Appraisal of land based extraction in SE Wales (September 2000);
- (iii) Bristol Channel Marine Aggregates Dredging Policy (MADP) May 2001;
- (iv) Comparative Impact Assessment of Land and Marine Sand and Gravel in SE Wales (2001), [Symonds];
- (v) Establishing a methodology for appraising aggregates demand and supply (EMAADS) (2003), [Ore Arup];
- (vi) Improving the information base on construction and demolition waste and quarry waste for use as aggregates in Wales [Smiths Gore] 2003.
- (vii) Survey of C + D and secondary aggregates - Welsh Environmental Trust 2006/07.
- (viii) Survey of C + D, and quarry waste 2007 [Faber Maunsell].

6.3. Since the Strategic Planning Guidance for South East Wales (Vol. 2) was issued by the SE Wales Strategic Planning Group in July 2001, there have been no further publications. The group still continues to meet on a regular basis.



7. PRODUCTION OF AGGREGATES IN SOUTH WALES

7.1. Table 7 illustrates the tonnages of aggregates produced in South Wales in the calendar year 2007. The total volume of crushed rock has decreased by 0.56 million tonnes (11%). Limestone tonnages have decreased by 11%; Sandstone tonnages have decreased by 5%; and Igneous tonnages have increased by 20%. It is interesting to note that the sale of Fill material is approximately 5 million tonnes which constitutes a significant increase since 2002.

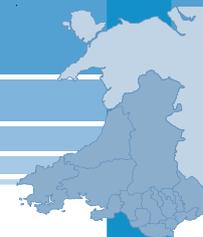
Table 7
Production of Aggregates in South Wales (million tonnes) 2003 - 2007

Type	2003	2004	2005	2006	2007	
Limestone	6.46	7.30	6.13	6.99	7.80	
Sandstone	3.71	3.20	3.49	3.35	3.39	
Igneous	0.95	1.08	1.23	1.12	1.32	
Total Crushed Rock	11.12	11.58	10.85	11.46	12.51	
Sand & Gravel	Land Won	0.19	0.40*	0.44	0.28	0.24
	Marine	0.98 1	1.07 1	1.00 1	0.95 1	1.07 1

1 Crown Estate-Summary of Statistics. * Estimate.

7.2. Land won sand and gravel does not contribute a significant volume to construction in the region of South Wales, but is important locally in the rural area of West Wales. Production has decreased slightly from 0.28mt to 0.24mt (-7%). As the figures for the region as a whole are relatively small they are subject to influence by large local projects.

7.3. Marine-won sand and gravel continues to provide a very important contribution to aggregate sales/production. Overall, tonnages produced have remained fairly consistent over the last 6 years with 1,070,981 tonnes being dredged in 2007. This represents a 11% increase in landings (119,013 tonnes) compared with 2006.



8. AGGREGATES - RESERVES

Table 8
Aggregate Reserves: Active, Inactive and Dormant (million tonnes) 2007

MPA	Active	Inactive	Dormant	Total		
Brecon Beacons NP	73.05.40	25.20	67.00	295.15		
Powys						
Carmarthenshire	68.10	61.80				
Ceredigion						
Pembrokeshire CC						
Pembrokeshire NP						
Neath - Port Talbot						
Swansea						
Blaenau Gwent	99.43	100.45			40.00	330.18
Merthyr						
Monmouthshire						
Newport						
Torfaen						
Bridgend	90.30					
Caerphilly						
Cardiff						
Rhondda Cynon Taff						
Vale of Glamorgan						
TOTAL	330.88	187.45	107.00	625.33*		

Note: Some of these reserve figures include some non-aggregate reserves and estimated tonnages.

* This figure exceeds that shown in Table 2 because all dormant reserves (where known) have been included.

8.1. The figures shown in this table need to be used with some degree of caution, particularly the dormant sites, as rough estimates have had to be made where accurate assessments are unavailable. Nonetheless, the table does highlight the distribution of reserves throughout the area and the contribution that dormant site reserves make to the overall landbank.



9. EVENTS OF INTEREST IN SOUTH WALES IN 2007

Bridgend County Borough Council

Consent was granted for a cement substitute 'test' facility at the former Stormy Down airfield. The objective of the project is to produce a substitute for cement thus saving considerable energy costs. Secondary aggregates such as pfa form part of the process. In view of the status of the site in the UDP, designated an area suitable in principle for future quarrying, a temporary 10 year consent was granted.

Cardiff

The new tunnel at Taffs Well quarry, near Cardiff was finally opened. This links the void through the southern rim of the quarry to the main road, thus allowing traffic to leave the quarry without negotiating Pentyrch Hill.

Considerable development works continued at the new Sports Village, Cardiff Bay, despite the downturn in the housing market.

Housing construction volumes remained high during the year with a reported 2,400 completions. This is the highest figure for authorities in S Wales and many were built in Cardiff Bay. The use of timber frame factory-produced panels for construction purposes appears to be increasing with several leading house builders employing this method on large housing projects. This is likely to result in less demand for concrete block production.

Carmarthen

A consolidation application was approved for Torcoed/Torcoed Fawr bringing the whole quarry complex under one set of conditions rather than three. Garn Bica quarry, Ponthyryd, was also reopened.

Two applications for the postponement of the periodic review date relating to Garn Wen and Llwynjack (sand and gravel) were submitted. Garn Wen was approved but Llwynjack refused on the basis it is within/adjacent to the Tywi Valley SAC and the original permission was not subject to EIA.

Neath

A new waste transfer station was approved at Neath Abbey Wharf. The site handles inert waste processed from skips at the rate of approximately 60,000 tonnes per year.

Tarmac received consent for an extension of time to complete sand and gravel extraction at Port Talbot Docks.



Vale of Glamorgan

A materials recycling facility (MRF) at Pant Quarry, near Ewenny, regrettably closed which bucked the upward trend for the industry. Inert waste recycling formed an integral part of the processes undertaken at the site. The exact circumstances for closure are not known.

The application to extend Wenvoe Quarry was withdrawn by Cemex in the light of the likely adverse ecological impact and strong public reaction. This quarry has been an important contribution to the supply of hard rock in the Cardiff area for some years and may have a serious impact on both the local and regional supply scenario.

General

The BERR sponsored study of the environmental impact of the possible Severn Barrages announced in June 2008 will include an assessment of potential sources of construction materials. Given the tonnages likely to be required, these are likely to include sites in the S Wales RAWP area.

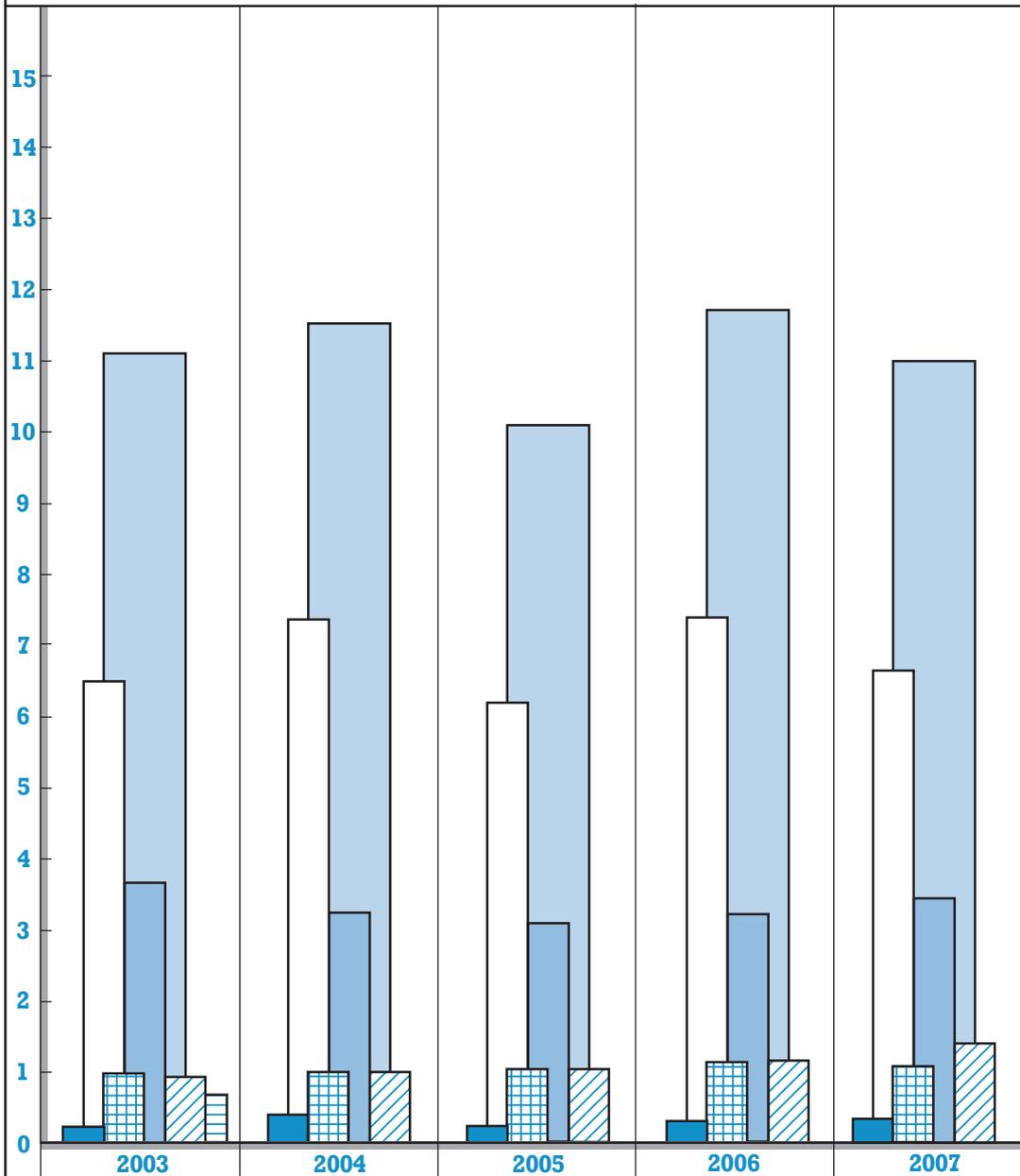


Table 9
Applications for Quarries determined in the year 2007

Mineral Planning Authority	Site Name	Type of Development	Decision	Decision Date
Blaenau Gwent	Trefil	Deposition of quarry waste and restoration	Approved	04.10.2007
Vale of Glamorgan	Wenvoe	Quarry extension	Withdrawn	-----
	Port Talbot Docks	Sand and Gravel extraction	Approved	-----
Carmarthenshire	Torcoed/Torcoed Fawr	Consolidation	Approved	30.08.2007
	Garn Bica	Variation of condition	Approved	22/02/2007



Table 10
Aggregate Sales 2003-2007 (in millions of tonnes)



KEY

- | | |
|--------------------------------------------------------------------------------------------------------|----------------------------------------------------------------------------------------------------------------------------------------------------------|
|  Limestone |  Sand & Gravel - Land won |
|  Sandstone |  Sand & Gravel - Marine (excluding materials for Cardiff Bay Barrage) |
|  Igneous |  Secondary Aggregates |
|  Total Crushed Rock | |



10. DEVELOPMENT PLAN UPDATE (as at 01.06.2008)

Blaenau Gwent

The Council has an adopted UDP in place (July 2006). It has commenced work on the LDP and will be consulting on the Preferred Strategy in October 2008.

Brecon Beacons Nation Park

tbc

Bridgend

The Preferred Strategy and Pre-Deposit Proposals are scheduled to be completed by the end of the year with a view to public consultation commencing in January of next year (2009).

Caerphilly

The consultation on the Preferred Strategy closed at the end of May 2007.

Cardiff

The Council consulted on a LDP Preferred Strategy in Autumn 2007 and is currently working towards placing a plan on deposit at the beginning of 2009.

Carmarthenshire

The consultation period on the discussion papers closed in July and the current candidate site stage closes in September. Consultation on the Preferred Strategy and Sustainability Appraisal/SEA is scheduled for late 2008/early 2009.

Ceredigion

Evidence is currently being gathered for the Preferred Strategy with the aim of producing it for consultation in January 2009. The aim is to have an adopted plan in place around the end of 2011/early 2012.

Merthyr Tydfil

The Preferred Strategy has been on consultation and closed in June 2007. The Deposit Plan is scheduled for issue in September 2008.

Monmouthshire

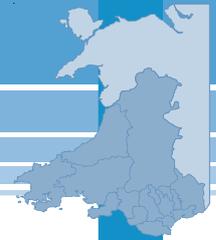
The Draft Delivery Agreement was approved in November 2007. The draft issues and options are currently out for consultation.

Neath-Port Talbot

The UDP was adopted in March 2008. A Draft Delivery Agreement for the LDP was submitted in July 2008. It is anticipated that work on the LDP will formally commence in September 2008.

Newport

The LDP is at the vision/objectives stage. The Delivery Agreement was approved on 23/05/2008



10. DEVELOPMENT PLAN UPDATE (as at 01.06.2008) (Continued)

Pembrokeshire County Council

The Draft Delivery Agreement has been issued and evidence and participation on the Pre-Deposit Plan is ongoing. It is anticipated the Preferred Strategy will be reported on in November 2008.

Pembrokeshire Coastal National Park Authority

The JUDP is the current development plan. Pre-deposit consultation on the Preferred Strategy proposal and sustainability appraisal for the LDP took place during February/March 2008. The LDP is expected to commence deposit consultation in May 2009.

Powys

The Draft Delivery Agreement has been published and went out for consultation in June/July 2008.

Rhondda-Cynon-Taff

The Council is due to report back on the Draft Pre-Deposit LDP in September. Public consultation is expected towards the end of the year.

Vale of Glamorgan

The Draft Preferred Strategy and initial Sustainability Appraisal report were consulted on in January/February 2008. All representations are being considered and responses are being drafted. A report will be made to Cabinet in October. Work is also being carried out on background studies which will inform the deposit plan eg. coast, SLA's, housing, burial land.



APPENDIX A

SITES INCLUDED IN 2007 AGGREGATES MINERAL SURVEY

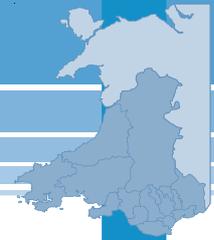


Table 11
Sites Included in 2007 Aggregates Minerals Survey

MPA (Former County)	Site * Inactive: no output ** Estimated data \$ Dormant	Mineral Type	Operator
Blaenau Gwent C.B.C. (Gwent)	Trefil Quarry	Limestone ST120130	Gryphonn Quaries Ltd
Brecon Beacons National Park (Powys, Mid Glam, Dyfed & Gwent)	Ammanford Perwyll Penderyn Blaen Onneu* **	Limestone SN654178 Limestone SN856157 Limestone SN956095 Limestone SN155170	Hanson Aggregates Tarmac Western Ltd Hanson Aggregates Hanson Aggregates
Bridgend C.B.C. (Mid Glamorgan)	Comelly Quarry Caens Quarry Grove Quarry* Cefn Cribbwr* Stomy Down*** \$	Limestone SS832800 Limestone SS822805 Limestone SS822798 Sandstone SS874828 Limestone SS842805	Cambrian Stone-Tarmac T S Rees Ltd Tarmac Western Ltd T S Rees Ltd Hobbs Holdings Ltd
Caerphilly C.B.C. (Gwent & Mid Glam)	Machen Hafod Bryn (Gelliargwellt Uchaf) Cefn Onn*** \$ Cwm Lleyshon***	Limestone ST225885 Sandstone ST224965 Sandstone ST126964 Limestone ST175852 Limestone ST210868	Hanson Aggregates Redland Aggregates Ltd A Price & Co Wyndham Lewis Trust Hanson Aggregates
Cardiff C.C. (South & Mid Glam)	Blaengwrlais* Creigiau* Cefn Garw* Taffs Well Ton Mawr Roath Basin Brassways Wharf Rover Way	Limestone ST146841 Limestone ST087817 Limestone ST146841 Limestone ST122822 Limestone ST118829 Marine Sand ST188732 Marine Sand ST188732 Slag/Secondary ST208760	Tarmac Western Ltd Tarmac Western Ltd Glen Harry Haulage Ltd Cemex Ltd T S Rees Ltd Cemex Ltd Hanson Aggregates Sims Metal
Carmarthenshire C.C. (Dyfed)	Blaen-y-Fan* Cilyrychen & Glanwenlais* Coygen** Cwmbin* Torcoed/Torcoed Fawr Capel* \$ Castle* \$ Gam Bica*** Hengoed*** \$ Limestone Hill*** \$ Llwynfran* \$ Maesdulais* \$ Penybanc*** \$ Pwllymarch* \$ Ty'r Gam*** \$ Ty Hywel** Foundry Road* Mynydd-y-Garreg* Coedmoelton Capel Graig	Limestone SN455115 Limestone SN613165 Limestone SN286092 Limestone SN476137 Limestone SN495140 Limestone SN560153 Limestone SN534150 Limestone SN518146 Limestone SN447102 Limestone SN468125 Limestone SN257216 Limestone SN518145 Limestone SN470130 Limestone SN259216 Limestone SN502141 Sandstone SN598446 Sand & Gravel SN634121 Sandstone SN434085 Sandstone SN250212 Shale SN245202	RMC Aggregates S Wales Ltd Tarmac Western Ltd F H Gilman Ltd RMC Aggregates S Wales Ltd Tarmac Western Ltd P Jones Hobbs Holdings Ltd Mr Jones Mr Lloyd Mr D.R. Williams Hobbs Holdings Ltd Hobbs Holdings Ltd Mr S Davies Mr Wilkins G Morgan Messrs Williams & Sons Mr A R Llewellyn Kidwelly Town Council Mr N Richards Msrs KMD + AW Gower

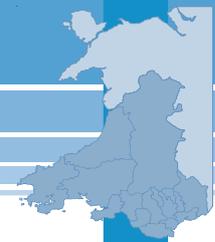


Table 11 (continued)
Sites Included in 2007 Aggregates Minerals Surveys

MPA (Former County)	Site * Inactive: no output ** Estimated data \$ Dormant	Mineral Type	Operator
Carmarthenshire C.C. (Dyfed)	Pennant	Sandstone SN483069	Phil Bowen
	Allygam***	Sandstone Silica SN587157	Bardon Aggregates
	Crosshands***\$	Sandstone SN586155	Mr Edwards
	Cynghordy***\$	Sandstone/Shale SN794403	D Roderick
	Danylan**	Sandstone SN524141	Platinum Base Ltd
	Dinas*	Sandstone SN627354	Tarmac Western Ltd
	Foelbach	Sandstone SN391257	Elvet Jones
	Garn***\$	Sandstone SN499136	Mrs Hibbert
	Nantyrhyddod***\$	Sandstone/Shale SN388319	Mrs I Tattershall
	Garn Wen***	Igneous SN167286	F H Gilman Ltd
	Cerigyr Wyn***\$	Igneous SN337160	F H Gilman Ltd
	Llwynjack	Sand & Gravel SN754331	Towy Sand + Gravel Ltd
	Glantowy***\$	Sand & Gravel SN746323	D A Lewis
	Burry Port	Marine Sand SN462007	Llanelli Sand Dredging Ltd
	Ceredigion C.C. (Dyfed)	Allgoch/Foelbryn**	Sandstone SN490483
Ystrad Meurig		Sandstone SN720695	Hanson Aggregates
Moelfryn Maen		Sandstone/Shale SN573628	G Jenkins
Esgair Newydd		Shale SN284502	I L Jones
Wstrws*		Shale SN380508	D R Powell
Cwm Nant Yard*		Shale SN648812	Mr Goubourn
Wern Meirch		Shale SN248263	M H Jones
Aberleri*		Sand	Raw-Rees
Abercoed		Sand/Gravel SN660550	Tregaron Sand & Gravel Co Ltd
Cnwcsaeson/Llwynllwd		Sand/Gravel SN200484	Cardigan Sand & Gravel Co Ltd
Crugyr Eryr		Sand/Gravel SN420503	D R Powell
Parri*		Sand/Gravel SN662560	D R Davies
Tylau		Gritstone/Shale SN588606	W J Evans
Glanyrafon	Sand & Gravel	Aberystwyth Concrete Ltd	
Merthyr Tydfil C.B.C. (Mid Glam)	Vaynor* (part in Brecon Beacons National Park)	Limestone SO039097	Hanson Aggregates
	Celligaer	Sandstone ST115995	Pioneer Aggregates (UK) Ltd
	Morlais Castle***	Limestone SO055098	None
Monmouthshire C.C. (Gwent)	Iffon*	Limestone ST463888	Hanson Aggregates
	Livox*	Limestone ST540975	Hanson Aggregates
	Newport Dock (Newport)	Marine Sand ST320850	Severn Sands Ltd
	Fairfield Wharf (Chepstow)	Marine Sand ST538934	Severn Sands Ltd
Neath-Port Talbot C.C. (West Glam)	Cwm Nant Leici	Sandstone SN728075	Aggregates Industries
	Gilfach	Sandstone SN752999	Cemex
	Port Talbot Steelworks (Margam)	Sand SS780870	Cambrian Stone Ltd/Tarmac
	Nantyglo Occs		
	Port Talbot & Steelworks	Sandstone SN87500290	F Pamell Ltd
	Briton Ferry Riverside Wharf	Slag/Secondary SS780870	Cambrian Stone Ltd
	Briton Ferry Ironworks Wharf	Marine Sand SS734940	Cemex UK Materials
	Briton Ferry Riverside Wharf	Marine Sand SS734940	Minimix
	Bwlch Ffos OCCS	Marine Sand SS734940	United Marine Aggregates
	Sandstone SN868024	Tarmac	



Table 11 (continued)
Sites Included in 2007 **Aggregates Minerals Surveys**

MPA (Former County)	Site * Inactive: no output ** Estimated data § Dormant	Mineral Type	Operator
Newport C.B.C. (Gwent)	Penhow Quarry*	Limestone ST423913	Hanson Aggregates (S Wales) Ltd
	Eastern Wharf	Marine Sand ST322873	Cernex
	Felrex Wharf	Marine Sand SS322873	Hanson Aggregates
	Great Western Wharf	Marine Sand SS322873	United Marine Aggregates
	Llanwern Works	Slag/Secondary ST395861	Cambrian Stone Ltd
	Llanwern	Blast Furnace Slag ST380860	Civil & Marine Slag Cement Ltd
	Maesglas (Mon Bank Sidings)	Railway Ballast (recycling) ST330186	Tarmac
	North Park	Marine Sand	Severn Sands
	Bottom Meadow*		
	Pembrokeshire Coast National Park (Dyfed)	Kiln/Carew	Limestone SN037058
Penberry §		Limestone SN049043	T Scourfield & Sons
Rhydaston		Igneous SM804259	Jamieson
Syke Walwyns Castle*		Igneous SM893236	Mason Bros Quarry Products Ltd
Pantgwyn**		Igneous Sandstone SM872106	F H Gilman Ltd
Trefigin**		Sand & Gravel SN124424	L & D Rees
Middle Mill		Sand & Gravel SN149437	Trefigin Quarries Ltd
		Igneous	F H Gilman Ltd
Cefn			
Pembrokeshire C. C. (Dyfed)		Gelli Halog	Slate, Stone & Fill SN204428
	Bolton Hill	Limestone SN178197	RMC Materials (UK) Ltd
	Plascwrt Farm**	Igneous SM5201084	F H Gilman Ltd
	Slade Hall Farm**	Igneous SN118274	M Evans
	Wogaston Farm*	Shale SM932168	Messrs EA & NW Jones
	Brawdy Farm	Sandstone/Shale SM09010	Mr Woods
	Clogue	Sand & Gravel SM850240	Mason Bros Quarry Products Ltd
	Pembroke Dock Wharf	Slate/Secondary SN220328	Mansel Davies & Sons Ltd
	Blaencloged	Marine Sand SM958039	United Marine Aggregates Ltd
	Trefigin*	Limestone SM215210	Harries & Sons
	Treffigame §	Sand & Gravel SM150430	Trefigin Quarries Ltd
	Penlan Clunderwen	SN141436	
	Gilfach §	Sandstone/Shale SN086186	S Griffiths
	Pope Hill (Halfway House)	Sandstone/Shale SN130271	Mrs Davies
		Shale/Mudstone SM946126	Lawrence Bros
Powys C. C. (Powys)	Cribarth		
	Core	Sandstone SN953525	Aggregate Industries (UK) Ltd
	Strinds/Dolyhir	Sandstone SO259592	Tarmac Western Ltd
	Tan-y-Foel**	Sandstone/Shale SO242682	Tarmac Western Ltd
	Tredomen	Sandstone SJ014015	H V Bowen & Sons
	Rhayader* §	Sandstone SO118304	K Jones
	Criggion	Sandstone SN198169	Tarmac Western Ltd
	Llanelwedd, Bullth	Igneous SJ289142	Hanson Aggregates
	Little Wernwilla	Igneous SO050521	Hanson Aggregates
	Buttington Brickworks	Sandstone SO218535	R Mills
	Borrow Pits	Sandstone SO326531	Border Hardcore & Rockery Stone
	Berwyn Granite §	Sandstone/Shale	Alun Griffiths Contractor
	Carreg §	Igneous	Powis Estate
	Caerfagu	Igneous	Powis Estate
		Sand & Gravel SO045654	Caerfagu Products Ltd



Table 11 (continued)
Sites Included in 2007 Aggregates Minerals Surveys

MPA (Former County)	Site * Inactive: no output ** Estimated data \$ Dormant	Mineral Type	Operator
Rhondda-Cynon-Taff C.B.C (Mid Glam)	ForestWood	Limestone ST015798	Hanson Aggregates
	Herdy	Limestone ST054810	Tarmac Western Ltd
	CraigyrHesg	Sandstone ST079919	Hanson Aggregates S Wales Ltd
Swansea City C.C. (West Glam)	Barland***	Limestone SS576895	Cuddy
	SwanseaDocks	Marine Sand SS673924	British Dredging Aggregates Ltd
	SwanseaDocks	Marine Sand SS 673924	United Marine Aggregates Ltd
Torfaen C.B.C. (Gwent)	-----	-----	-----
Vale of Glamorgan C. (South & Mid Glam)	Aberthaw	Limestone (Lias) ST037672	Lafarge Cement Ltd
	CarwaFarm	Limestone SS978798	Lafarge Cement Ltd
	Lithalon	Limestone SS899765	Hanson Aggregates (S Wales) Ltd
	Partyfynnon	Limestone ST046740	Seth Hill & Son Ltd
	Wervoe	Limestone ST130741	Cemex Ltd
	ForestWood (see RCT)	Limestone ST015798	Hanson Aggregates
	ArgoedIsha**\$	Limestone SS992790	Landowners
	Ewenny	Limestone SS902768	Lafarge Aggregates/Minimix
	CnapTwt**\$	Limestone SS911753	Duchy of Lancaster
	Longlands	Limestone SS928772	Green Circle Ltd/Viggars Bros
	Part	Limestone SS895760	Tarmac Western Ltd
	Ruthin**\$	Limestone SS975792	Lafarge
	StAndrews**\$	Limestone ST143714	T J Bowles
	BarryDocks	Marine Sand ST127667	Cemex Ltd
	AberthawPowerStation	PFA/FBA (Sec) ST038660	RWE npower



APPENDIX B

MEMBERS OF THE SOUTH WALES REGIONAL AGGREGATES WORKING PARTY

(as at August, 2008)



M J Hooker
(Chairman)

S J Bool
(Secretary)
Mineral Officer
Bridgend County Borough Council

G Jones
Chief Regeneration Officer
(Development Services & Private Sector Housing)
Blaenau Gwent County Borough Council
(represented by L Healey)

C Gledhill
Chief Executive/National Park Officer
Brecon Beacons National Park
(represented by C Morgan)

P Mears
Chief Planning Officer
Caerphilly County Borough Council
(represented by Mrs R Amundsen)

J Stedman
Strategic Planning Manager
Cardiff County Council
(represented by S Williams)

E Lewis
Director of Environmental Services & Housing
Ceredigion County Council
(represented by G Dorrington)

E Bowen
Head of Planning, Environment
& Economic Development Department
Carmarthenshire County Council
(represented by H Towns)

N Davies
Planning Manager
Merthyr Tydfil County Borough Council

G Ashworth
Head of Planning & Regeneration
Monmouthshire County Council
(represented by M Davies)



G White

*Head of Planning Services
Neath Port Talbot County Borough Council
(represented by N Morgan)*

S Wild

*Head of Planning & Economic Regeneration Services
Newport County Borough Council
(represented by L Christian)*

Dr Steven Jones

*Director of Development
Pembrokeshire County Council
(represented by Mrs C A Williams)*

Ifor Jones

*Head of Conservation
Pembrokeshire Coast National Park
(represented by Mrs Julie Kirk)*

Gareth W Thomas

*Director of Planning & Economic Development
Powys County Council
(represented by S Packer)*

S Davies

*Director of Development & Regeneration
Rhondda-Cynon-Taff County Borough Council
(represented by Owen Jones)*

C Anderson

*Director of Development
City & County of Swansea
(represented by R Henderson)*

Duncan Smith

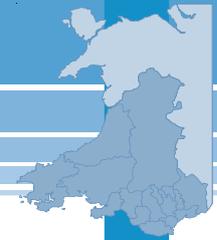
*Chief Officer
Planning & Public Protection
Torfaen County Borough Council
(represented by A Wilcock)*

R Thomas

*Head of Planning & Transportation
Vale of Glamorgan
(represented by M Lucas)*

K Hobden

*Planning Officer
Quarry Products Association*



K Seaman
Representative QPA
Quarry Products Association

M M Frampton
Representative QPA
Quarry Products Association

M Lawer
Representative QPA
Quarry Products Association

B Hollington
Farming & Rural Conservation Agency
(Agricultural & Rural Affairs Department)

Carolyn Warburton/S Martin
Welsh Assembly Government

Daniel Wilkes
Department of Communities and Local Government

M Wrigley
Crown Estate

to be confirmed
British Geological Survey

J Cuddy
Cuddy Demolition & Dismantling

A Wilkes
Environment Agency Wales

Karen Maddock-Jones
Countryside Council for Wales

P Huxtable
British Aggregates Association

I Fox
Rwenpower

G Bishop
Welsh Environment Trust



APPENDIX C

REPORTS PRODUCED BY THE SOUTH WALES REGIONAL AGGREGATES WORKING PARTY

(copies are available from the Secretary)



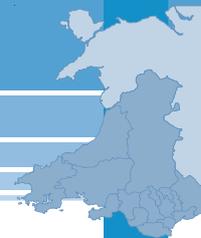
REPORTS PRODUCED BY SOUTH WALES REGIONAL AGGREGATES WORKING PARTY

1.	Interim Report	<i>September 1977</i>	£1.50
2.	Supplement to Interim Report	<i>December 1977</i>	£1.00
3.	Regional Commentary (Part I)	<i>December 1980</i>	£2.00
4.	Regional Commentary (Part II)	<i>August 1981</i>	£2.00
5.	1981 Aggregates Mineral Survey	<i>December 1983</i>	£2.00
6.	1985 Aggregates Mineral Survey	<i>March 1987</i>	£2.00
7.	AM85 Analysis and Commentary	<i>December 1987</i>	£2.00
8.	Marine Dredging	<i>March 1989</i>	£5.00
9.	1989 Aggregates Mineral Survey	<i>October 1990</i>	£5.00
10.	AM89 Regional Commentary	<i>January 1992</i>	£10.00
11.	Progress Report For 1990 - 1991	<i>October 1992</i>	£5.00
12.	Progress Report for 1992	<i>September 1993</i>	£5.00
13.	1993 Aggregates Minerals Report	<i>August 1994</i>	£5.00
14.	Guidelines for Aggregates Provision in South Wales	<i>March 1995</i>	£5.00
15.	Annual Report 1995	<i>March 1997</i>	£5.00
16.	Annual Report 1996	<i>March 1998</i>	£7.00
17.	Annual Report 1997	<i>August 1999</i>	£10.00
18.	Annual Report 1998	<i>March 2000</i>	£10.00
19.	Annual Report 1999	<i>November 2000</i>	£10.00
20.	Annual Report 2000	<i>October 2001</i>	£10.00
21.	Annual Report 2001	<i>November 2002</i>	£12.50
22.	Annual Report 2002	<i>August 2003</i>	£12.50
23.	Annual Report 2003	<i>August 2004</i>	Available free see website (www.swrawp-wales.org.uk)
24.	Annual Report 2004	<i>June 2006</i>	
25.	Annual Report 2005	<i>March 2007</i>	
26.	Annual Report 2006	<i>October 2007</i>	
27.	Annual Report 2007	<i>December 2008</i>	



APPENDIX D

**-POLICY OBJECTIVES-
OF THE
SOUTH WALES
REGIONAL AGGREGATES
WORKING PARTY**



-AIMS & OBJECTIVES- OF THE SOUTH WALES R.A.W.P.

1. Aim

The core aim will be to provide the secretariat and technical services necessary for the effective functioning of the Regional Aggregates Working Party (RAWP) in South Wales. In order to function effectively, the RAWP requires the services of a dedicated technical secretariat. Specific intermediate objectives aimed at delivering the core objectives are set out below.

2. Objective 1: Administration and Liaison

- (i) **RAWP meetings:** To organise a minimum of 2 meetings each year of the South Wales RAWP together with sub-group meetings as required in liaison with the Chairman and members including:
 - fixing date and venue of the meeting;
 - circulating the agenda and papers;
 - drafting related correspondence and papers as necessary;
 - providing and circulating a draft minute of the meeting within 2 weeks of the meeting;
 - revising and circulating minutes to take account of members comments;
 - ensuring minutes are available to the public for inspection.
- (ii) **Liaison:** To liaise with other Mineral Planning Officers in the region and RAWP secretaries in Wales and England; to attend at least 1 meeting with the nominated officer of the Welsh Assembly Government and North Wales RAWP secretary per year; meeting each year with English and Welsh RAWP secretaries as necessary, and draft related correspondence as required.
- (iii) **Input into national guidance on aggregates provision:** To help the RAWP make an appropriate contribution to the preparation of national guidance by advising on the demand for and supply of aggregates in the region. It will be expected that the Technical Secretary will attend appropriate and relevant seminars and conferences that may assist in the development of RAWP work (in cases of doubt the approval of attendance will be confirmed by the Assembly's nominated officer).
- (iv) **Default arrangements:** To ensure that regular liaison with other mineral planning officers is undertaken to secure progress on monitoring and reporting work. In the event of inadequate progress, it may be necessary for additional work to be undertaken by the RAWP Technical Secretary in consultation with the nominated officer and RAWP members.
- (v) **Joint Voluntary Arrangements of Local Authorities:** To administer the arrangements for establishing joint voluntary arrangements of local authorities to assess the draft Regional Technical Statement for Aggregates at 5(ii) below to provide a context for proper consideration of land use issues relating to aggregates provision in unitary development plans. All local authorities in the region should be represented with a view to reaching a consensus about



the recommendations for the region in the RTS. This will then need to be agreed by each constituent local authority; each local authority in the region should then include in its own unitary or local development plan elements of the agreement or if individual local authorities do not accept the RTS, the Welsh Assembly Government will consider its default powers to intervene in the planning process as a last resort.

3. Objective 2: Research - Monitoring

- (i) **Annual primary aggregates surveys:** To organise, co-ordinate and collate annual surveys of the production of primary aggregates (including marine dredged aggregates) and reserves of aggregates undertaken by mineral planning authorities. In years when the 4-yearly Aggregates Monitoring Surveys are carried out, the annual surveys of primary aggregates production will not be necessary;
- (ii) **AM2005 and AM2009:** To support AM2005 by distributing survey forms to mineral planning officers and ensuring that forms are forwarded to operators, and that returns are timely, accurate and collated as required. To initiate a similar survey for AM2009 subject to further discussion and agreement with Assembly officials and RAWP members;
- (iii) **Road planings:** To carry out an annual survey of the arisings and re-use of road planings;
- (iv) **Alternative materials:** To identify and monitor the key regional sources of alternative material with potential for use as aggregates (other than construction and demolition waste and road planings but including minerals used as non-aggregates), identify key contacts, maintain an up-to-date list of sources of materials with potential for aggregates use and collect reliable information on arisings and actual potential use of such material as aggregates;
- (v) **Development Plans:** To monitor UDPs/LDPs and future development programmes and major proposals to determine regional demand for aggregates and any potential shortfall of supply;
- (iv) **Planning decisions:** To monitor mineral planning decisions determined since the previous RAWP report.

4. Objective 3: Research - Assessment

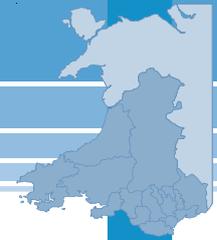
- (i) **Demand/supply of aggregates:** To assess the prospects for changes in the demand and supply of all types of aggregates in the region;
- (ii) **Landbanks:** To assess reserves of primary aggregates in active and dormant sites and the likelihood of dormant reserves being reactivated;



- (iii) **Alternative materials:** To assess the use of secondary and recycled materials (including construction and demolition waste) as aggregates through liaison with WET, to consider ways of improving data collection and increasing use of such materials as aggregates, including an assessment of each unitary authority's capacity and success in recycling materials as aggregates;
- (iv) **Environmental capacity:** To assess the environmental capacity of each unitary authority in the region to meet the demand for aggregates.

5. Objective 4: Reporting

- (i) **Annual reports:** To prepare and publish an annual report that takes account of the comments of RAWP members as hard copy and electronic versions. The minimum content should be as follows:
- a report on the assessment undertaken in relation to Objective 3(i) and (ii) above, and the monitoring of the assessment of environmental capacity in Objective 3(iv) above following the publication of the Regional Technical Statement in (ii) below;
 - a calculation of the regional and individual mineral planning authority landbank situation based on reserves, production and agreed allocations as at 31 December each year (subject to compliance with agreements relating to confidentiality of information);
 - information on alternative sources of aggregates including road planings;
 - a summary of progress and relevant content in relation to aggregates in the preparation of development plans in the region;
 - a comprehensive list of active and inactive sites producing aggregates in the region;
 - a list of mineral planning permissions (including those relating to mineral review applications) determined since the previous RAWP report;
 - a list of planning proposals and permissions approved for major construction projects that may have a regional influence on the demand for aggregates.
- (ii) **Regional Technical Statement:** To prepare and publish a Regional Technical statement in 2007 to set out:
- the results of the regional assessment of the environmental capacity of each unitary authority to contribute to an adequate supply of primary aggregates;
 - to provide a strategy for the provision of aggregates in the region in accord with that regional assessment, with allocations of future aggregates provision for each mineral planning authority area, if appropriate, to provide a strategic base for future development plans;
 - to assess current and future imports and exports of aggregates;
 - to assess the current and future contribution of marine aggregates; and
 - to advise the Assembly on the potential in each region in Wales for increasing the use of alternative materials in place of primary aggregates.



6. Intermediate Objectives:

Will be subject to review and change at the end of each year in light of the assessments carried out in 7(ii) below.

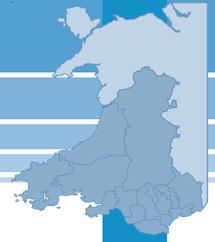
7. Contract Monitoring Objectives:

Monitoring will consist of:

- (i)** a minimum of three-monthly meetings with Assembly officials in Cardiff at which the progress against core and intermediate objectives is reviewed and appraised (one of these meetings will be arranged jointly with the other Welsh RAWP Secretary as in Objective 1(ii) above);
- (ii)** submission of an annual monitoring report within 3 months of end-year to incorporate evidence-based assessment of work carried out. The annual report at the end of the contract period shall include a summary of the objectives achieved throughout the contract period;
- (iii)** submission of mid-year progress report to show the extent the objectives are being achieved (or reasons for any shortfall) and an interim income and expenditure account and forecast.

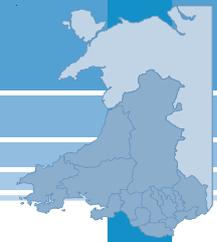
8. Evaluation Objectives:

An evaluation programme will be developed in line with the monitoring objectives identified in paragraph 7 above.



APPENDIX E

-WET REPORT 2007-



-WET Report- KEY (Headline Figures)

PFA/FBA

Usage of PFA/FBA relatively stable apart from one-off contracts.

Slag for the Manufacture of Cement

5% drop in cement manufactured from slag at Port Talbot.

Steel & Blast Furnace Slag for use as Aggregates

Overall increase of 91k. High value end use sales increased by 199k whilst low decreased by 108k. This is an encouraging shift which may not be sustained due to the downturn in the economy.

Rail Ballast

There has been a slight decrease in annual tonnage controlled by lack of Railtrack activities.

Glass

Small increase (7k) in sales. All sales are considered to be high end use value for bedding sand or as a replacement for fines in the production of asphalt.

Demolition

A 5% (approx) drop in demolition works/production was reported by one of the major demolition contractors.

Construction, Demolition & Excavated Waste

Significant increase in sales of high value (118k) and low value (288k) were reported in 2007, compared with previous years sales.

Asphalt Planings

Only 5k of asphalt planings were re-processed into hot mix asphalt. A 20% drop (approx) from the previous year (2006).

Prediction of Future Demand

With the widespread downturn in the economy fuelling a recession, the prediction is that there will be a significant drop in the demand of between 15%-20%. This may be for a period of 2-3 years or longer. This could result in several companies struggling to maintain business and cover investments in new plant. On-site demolition operations have certainly affected the use of virgin aggregate but off-site operations less so because of the costs of screening/crushing/washing. Until recycled aggregate is sold in the high value clean stone market, the impact on the sales of virgin aggregate is not considered to be significant. However, quarry operators need to maintain efficiency in the processing of aggregate and minimise waste.

Specific Welsh Issue

There are a significant number of small to medium quarries within Wales with a reasonable geographical spread across the region. This has resulted in:- **1.** very competitive marketing which has kept virgin aggregate prices relatively low; and **2.** small haulage distances which also result in low costs. It is evident, therefore, any substitute materials for virgin aggregate have to be cost neutral at minimum, to compete in the market place. However, the unit cost of recycled aggregates is in fact generally higher because of the greater need for processing. Another factor weighing against the greater use of recycled c & d waste/secondary aggregates is the availability of such materials and their location. The number of sources of secondary aggregates is limited and generally concentrated in the South East of Wales. C & D waste is generally of low quality and competes directly with low value fill for quarries. Considerable effort is being made, however, to secure greater high end use for C & D waste. The impending introduction of site waste management plans may have a positive effect on the availability of more recycled aggregates.

Conclusions

There appears to be a case for increased fiscal measures i.e. increase in Aggregates Levy, Landfill charges, which need to be significant to send out a clear message to influence the market for C&D waste and secondary aggregates. Small incidental increases do not convey positive intent to warrant a sea-change of practice in the industry. This message needs to be conveyed to the relevant bodies to implement appropriate changes.

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