ISLE OF WIGHT COUNCIL

Isle of Wight Local Aggregate Assessment 2022

December 2023

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Isle of Wight LAA 2022 Summary Commentary
Area: Isle of Wight
Aggregate: Land-won sand & gravel, soft sand, crushed rock (made up of limestone and chalk); Marine-won sand and gravel; Imported (via wharves) crushed rock
Sales: Sales from all aggregate sources have decreased from the previous monitoring year, with only land-won sand & gravel sales being above the 10yr average. While the largest decrease by volume was in recycled aggregate (down 29,000t), proportionately imported crushed rock saw the largest decrease at 63% reduction on 2021 sales. Land-won and marine sand & gravel made the biggest contribution for 2022, accounting for a total tonnage of some 187,000t or 86% of total aggregate sales.
Aggregate Provision Rate (APR): Current MASS based guidelines on the amount of land-won (sand & gravel) aggregate supply, or Aggregate Provision Rate for the Isle of Wight is 0.1 mtpa (or 100,000 tpa) subject to testing in the preparation of local mineral plans.
Reserves/landbank: Based on current plan provision, permitted sand & gravel reserves total 483,652 tonnes with a landbank of 4.8 years in 2022. The declining landbank is to be expected given the current local mineral plan was adopted in 2012 and is programmed for replacement in the next 2 to 3 years.
Capacity: Based on permitted reserves and allocated sites, the council has a sufficient provision of land-won sand and gravel to meet the apportionment figure adopted by the (core strategy) plan, over its lifetime. There is a significant over provision, primarily as a result of allocated sites. There is sufficient capacity through both the landing of marine-won and secondary and recycled aggregates to be able to provide further flexibility and resilience in supply, certainly in the short to medium term.
Prospects: The council received a planning application in April 2022 for the extraction of 900,000 tonnes of sand and gravel-, yet to be determined, but has the potential to bring permitted reserves in excess of 700,000 tonnes, providing the Island with a landbank of permitted sand and gravel reserves in excess of 7 years. In 2023 the council received 2 EIA screening opinion requests, which if subsequent applications were approved would result in over 500,000 tonnes of sands and gravels of varying composition.
LAA Conclusion: It is considered that the Isle of Wight's local aggregate provision will not impact the wider South-East region as a whole. Whilst it is recognised that the Isle of Wight is not meeting the required landbank based on its local requirement, this is due for review in the near future and there is significant spare capacity from alternate sources (primarily marine-won) as well as potentially new consented reserves.

Isle of Wight Local Aggregate Assessment (LAA) 2022 Dashboard												
Aggregate	Sales 2022	Average annual sales		Average annual sales trend		Reserves @ 31/12/22	Reserves trend		Aggregate Provision Rate (APR)[5]	Landbank (years)	Planned allocations outstanding[6]	Capacity[7] @ 31/12/22 (ktpa)	Notes
		10-year	3-year	10-year	3-year		10-year	3-year					
Soft (building) sand (SS)	15	12	13			184		↔	12	15			First year of complete figures therefore no trend analysis available. Figures are from 2 quarries and should be treated as confidential. APR based upon 10 yrs average sales.
Sharp sand and gravel (SSG)	93	79	96	↑ or ↓	↑ or ↓	299	↓	↓	100	3			Insufficient (ss) data to provide 10yr analysis
Sand and gravel (S&G)[9]	108	92	109	↑	↓	483	↓	↓	100	5			
Crushed rock (CR)	0					600	↔	↔	0	#DIV/0!			The reserve quoted is for the single limestone quarry within the MPA that is currently inactive. 8,137t of chalk was sold, with a reserve of 273,718t
Marine dredged aggregates (MDA)	79	90	82	↓	↓				90				APR based upon 10-year average annual sales.
MDA landings	48			↑ or ↓	↑ or ↓								
Imported S&G @ wharves	23	55	58	↑ or ↓	↑ or ↓				55				APR based upon 10-year average annual sales.
Imported CR @ wharves	7	22	14	↓	↓				22				APR based upon 10-year average annual sales.
Imported S&G @rail depots													No rail depots

Imported CR @ rail depots													No rail depots
Secondary aggregate	0	0	0						0		0		No secondary aggregate processing
Recycled aggregate	23	55	58	↓	↓				55				APR based upon 10-year average annual sales.

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1. Introduction

1.1 The purpose of this Local Aggregate Assessment (LAA) report is to detail the current and predicted situation on the Isle of Wight with respect to all aspects of aggregate supply.

1.2 The National Planning Policy Framework (NPPF)[1] sets out the requirement for local authorities to produce an annual LAA, stating;
'*Minerals planning authorities should plan for a steady and adequate supply of aggregates by: preparing an annual Local Aggregate Assessment … to forecast future demand, based on a rolling average of 10 years' sales data and other relevant information, and an assessment of all supply options (including marine dredged, secondary and recycled sources)*'.

1.3 The Isle of Wight Council adopted the Isle of Wight Core Strategy[2] (including Waste and Minerals) and Development Management Document Development Plan Document in March 2012. The Core Strategy provides minerals (and waste) planning policy on the Isle of Wight until 2027. The Isle of Wight Council is preparing a new plan called the Island Planning Strategy. The Local Development Scheme (LDS) sets out the programme for preparing the Island Planning Strategy and other main planning documents that will form part of its local plan, known on the Isle of Wight as the Island Plan. This will include a separate Minerals and Waste Plan, the preparation of which is due to commence in 2024 once the Island Planning Strategy has progressed to examination stage.

1.4 It is important to note that the data used in the preparation of this report predominantly comes from the annual monitoring of aggregates sales by the Isle of Wight on behalf of the South East England Aggregate Working Party (SEEAWP). The Aggregate Monitoring (AM) survey collects annual sales data from active mineral extraction sites, minerals wharves and recycled aggregate processing sites.

1.5 This report has been prepared on the basis of the revised (May 2017) guidance on LAA published by the Planning Officers Society and the Mineral Products Association. In addition the regionally specific guidance provided by the SEEAWP *Local Aggregates Assessments: Supplementary Guidance*, 2019 has also been used.

How the LAA has been developed

1.6 Given the strategic nature of minerals, both in terms of their importance to supporting virtually all forms of development and their geographical distribution leading to the movement of materials from source to point of demand, it is important that the LAA is developed collaboratively.

1.7 The council has sought to work collaboratively with other bodies in the preparation of this LAA, in order to satisfy Section 110 of the Localism Act. In particular the council has maintained an informal ongoing relationship with Hampshire County Council, due to being the nearest 'neighbouring' Mineral Planning Authority (MPA) and the one most likely to be affected by strategic mineral supply decisions taken on the Island. Furthermore, it also provides links to the mainland both in terms of aggregate wharves, but also as the MPA whose area contains all the vehicular ferry ports to the Island. The geographic proximity also results in a similar geology and consistency in approach between the MPAs on evolving issues is more likely to provide certainty to the mineral industry.

[1] National Planning Policy Framework (2021) - Para 213 National Planning Policy Framework (publishing.service.gov.uk)
[2] Island Plan – Isle of Wight Core Strategy (including Waste and Minerals) March 2012 https://www.iow.gov.uk/azservices/documents/1321-Core%20Strategy%20-%20Adopted%20Mar%202012.pdf

1.8 Evidence the council has supports the minerals targets set out in this assessment, informed by the adopted mineral policies of the Island Plan core strategy, to be appropriate for the Island. Should the Island Planning Strategy (IPS) move to the formal stages of the plan preparation process in late 2023, this is likely to be the last LAA that makes reference to the mineral's targets in the context of the Core Strategy. However any delay to the progress of the IPS, either in terms of not undertaking the Regulation 19 period of representation, or delays in the submission / examination stages of the plan, may result in the next LAA still referring to the Core Strategy context.

Consultation

1.9 A draft version of the LAA was submitted to SEEAWP for consideration at the 7th December 2023 meeting of the AWP.

1.10 Subsequent to the SEEAWP meeting, the Isle of Wight MPA received general comments, none of which were specific to the Isle of Wight LAA. These can be summarised as;

- Reviewing all the LAAs there is a mixture of approaches to demand. Industry view considers that meeting demand should be highlighted in each LAA.
- Some APRs have declined because of sales. However, if sales are dropping, other data may not have changed and so an explanation of the rationale would aid understanding.

1.11 The following was suggested that the Isle of Wight MPA will consider in addressing the comments above in the next (2023) LAA;

- The graphs in the Oxfordshire LAA are helpful;
- The assumptions made in the West Sussex LAA provide a range of scenarios, which was helpful. However, an explanation on how the scenarios have been determined is required.

Data limitations

1.12 The Isle of Wight suffers in mineral reporting from its relatively small size, both in comparison to some of its neighbouring MPAs and with regards to the low numbers of quarries, wharves and operators.

1.13 This has had consequences in terms of how mineral information on the Isle of Wight is reported. The first is that due to the limited number of quarries, wharves and operators, often figures reported through annual monitoring have not been able to be published due to commercial confidentiality. The second is that where mineral reporting has occurred at a higher than MPA level, figures for the Island have often been aggregated into that of Hampshire (or wider) making analysis of such information with regards to the implications for the Island impossible with any degree of certainty.

1.14 Both of these data limitations have been recognised independently, through consultation on previous LAAs, by the technical secretary to the AWP of which the Island is a member, and the BGS.

2. Aggregate Supply and Demand

Geology of the Isle of Wight

2.1 The geology of the Isle of Wight gives rise to the following mineral deposits (as shown on Figure 1):

- Sand and Gravel;
- Limestone;
- Chalk; and
- Brick Clay

2.2 In simplest terms, the geological deposits that occur on the Island can be divided between superficial and solid deposits, as detailed below. The superficial deposits (including sand and gravel) occur across the Island and are categorised in Table 1.

Table 1: Superficial Deposits across the Island

Deposit	Description
River Terrace Deposits	Occur at several levels in most of the major valleys on the Island. These broadly comprise older, raised river terrace sequences (sometimes called 'Plateau Gravels') and younger, flood plain terraces associated with, and underlying, present day alluvium
Angular flint gravel (clay with flints)	Occur on the summits and upper slopes of the Chalk Downs in the central and southern parts of the Island.
Sub-alluvial gravel	Occur beneath the alluvium of the main valleys on the Island and are compositionally similar to river terrace deposits.
Storm beach gravel	Occur from Sconce Point to Bouldnor in the west of the Island. The form of these deposits is dictated by the east-west longshore drift which prevails along this coast and are generally made up of fine to coarse flint gravels, grading seawards into finer sands and silty clays.
Blown sand	The largest area of blown sand is in the south of the Island, on top of a vertical cliff between Atherfield and Chale, at a height of approximately 50m above sea level and consists of disintegrated Lower Greensand Group up to 7m in thickness.

2.3 The solid geology (including chalk, and the Sandrock Formation within the Cretaceous Lower Greensand Group) of the Island generally run from east to west along the length of the Island perhaps best demonstrated by the chalk forming Culver Cliff in the east, central Downs in the middle and the Needles to the west of the Island.

Mineral Resources on the Island

2.4 In conjunction with the Department for Levelling Up, Housing & Communities[3], the British Geological Survey (BGS) published a technical report CR/02/130N2 in 2002 and has prepared mineral resource mapping to provide information regarding mineral resources on the Isle of Wight for planning purposes (see Figure 1).

[3] Known as the Office for the Deputy Prime Minister at the time.

Figure 1: British Geological Survey Mineral Resource Areas

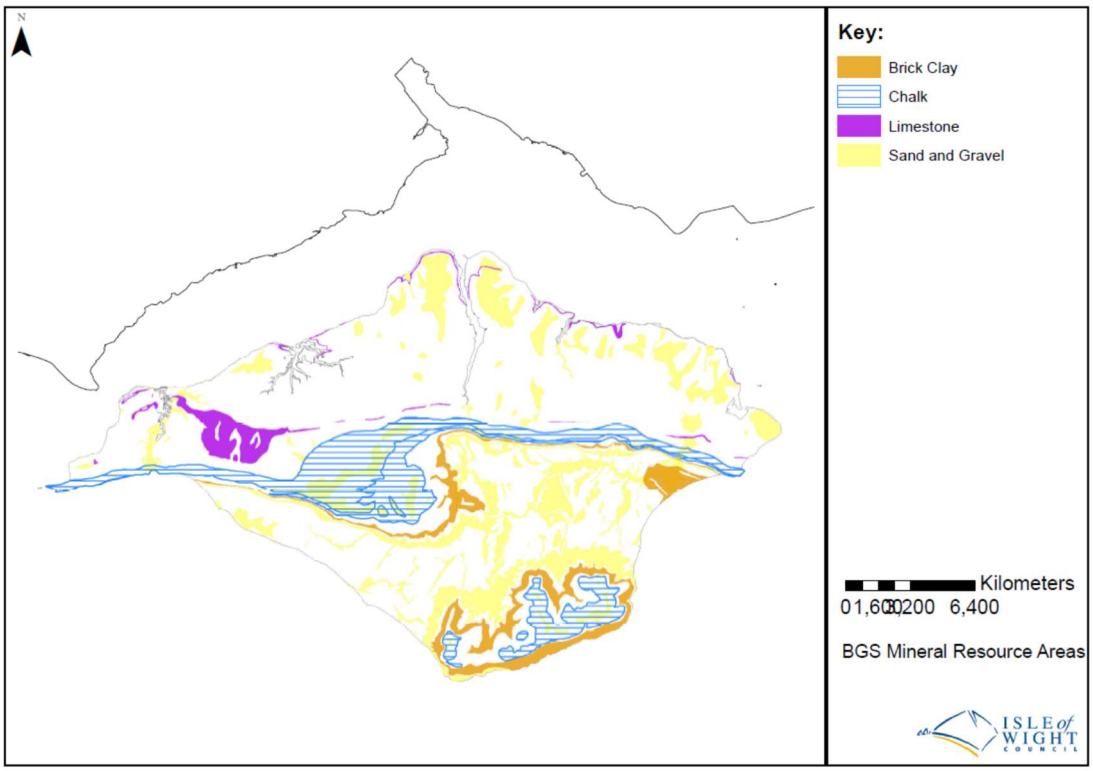


Table 2: Summary of minerals existing on the Island

Mineral	Information regarding extraction and need
Sand and gravel (including superficial deposits such as river terrace deposits, sub-alluvial gravel, storm beach gravel and bedrock sands such as the Cretaceous Lower Greensand Group).	Deposits of sand and gravel can be found across the Island. Resources of gravel can be mainly found in the river valleys, whereas construction sand is provided in the bedrock sands which occur east west across the south of the Island. Currently extraction takes place across the Island.
Brick clay – the Weald Clay Formation	This was previously extracted at Sandown; however no brick clay is now produced on the Island.
Chalk – Grey and White Chalk sub-groups	The chalk resource runs across the length of the Island with the majority of extraction in the White Chalk sub-group. It is understood there are three active sites extracting chalk for constructional fill and agricultural lime.
Limestone – Bembridge Limestone Formation	This resource is located in the west, north and east of the Island. There are substantial permitted reserves of this mineral at Prospect Quarry, Shalcombe. Although permitted only nominal amounts are extracted per annum, due to the relatively poor quality of the limestone.
Hydrocarbons – oils, gas and coal	Much of the Island was explored for oil and gas in the 1970s and while there is currently limited oil and conventional gas prospectivity, five new (December 2015) PEDLs[4] for the Isle of Wight have been awarded[5]. Therefore the possibility of further interest exists, as new technologies become established.
Building stone	Although local stones have been previously used, the Isle of Wight has no commercially significant building stone resources.

[4] PEDL – Petroleum Exploration and Development License

[5] Information taken from OGA 14th Onshore Licensing Round Offers by Operator which can be viewed here as a Microsoft Excel Spreadsheet document

2.5 The "*Assessment of the Potential for Mineral Sites on the Island, Site Options Report*" (October 2010) identified the minerals that exist on the Island, as summarised in Table 2 and discussed their previous and current extraction.

2.6 Historically, much of the Island's land-won aggregate production has come from the central and eastern areas of the Island. Certainly this is where the majority of sand and gravel has been won. While there is one small quarry producing high quality sand in the west of the Island (using the River Medina as a natural east-west central divide), for the most part, to date chalk has been the main material won in this area.

2.7 As existing sand and gravel deposits have been worked out, new permissions have been sought and granted, again in the central and eastern areas of the Island. No new chalk permissions have been granted for at least the last five years (probably beyond ten years) reflecting an overall decline in demand and sufficient existing permitted reserves.

2.8 Other crushed rock reserves (some grades of chalk are used locally as construction fill where this is acceptable, such as agricultural tracks etc.) extracted on the Island includes limestone. There are permitted reserves of limestone at one site on the Island; however production is at a very low level.

2.9 The demand for other minerals such as those used in building has been considered (as part of the Assessment of the Potential for Mineral Sites on the Island, Site Options Report, October 2010) by the council's Conservation and Design section. They have concluded that although resources such as flint and brick earth have an important role to play in restoration and maintenance of the Island's structures and that quarrying these would reduce the pressure upon reclaimed materials from other buildings, it is considered that these are not of strategic importance in terms of demand with quarries of these indigenous resources being redundant and replicas being available.

Land-won Sand and Gravel

2.10 The sales figures of sand and gravel on the Island for the most recent 10 year period are detailed in Table 3 below. This LAA is the first year of reporting a separate sales figure for indigenous soft sand. However, as all previous land-won sand and gravel has been a total figure, in order to allow year-on-year comparison of previous sales, the total figures reported for sand and gravel include the separate figures reported below for soft sand. The development of a new minerals and waste plan will provide the opportunity to reset the reporting of these figures.

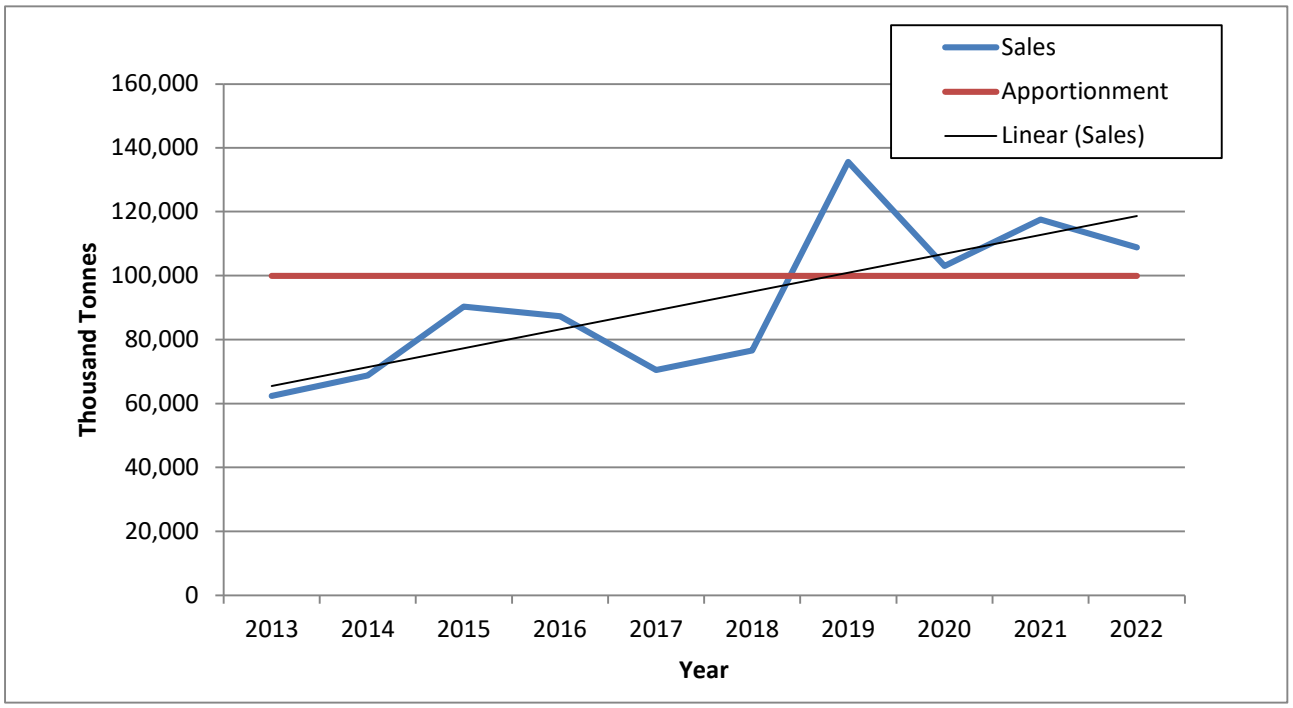
2.11 The overall trend is one of generally increasing sales since 2013. There are variations, with two distinct peaks in 2015 and 2019. Whilst sales fell between 2015 and 2017, sales figures for 2019 hit a significant high of over 135,000 tonnes (47% above the 10 year average). Sales for 2021 saw an increase from the previous year, close to the sales trend (just above) while the most recent reporting year of 2022 saw a decrease from 2021, but again remaining close to the sales trend (just below, see Figure 2).

Table 3: Land-won sand and gravel sales in the Isle of Wight, 2013 – 2022 (tonnes)

Year	2013	2014	2015	2016	2017	2018	2019	2020	2021	2022	Ave.
Sales	62407	68760	90306	87263	70431	76625	135612	103055	117539	108849	**92084**
								103055	117539	108849	**109814**

2.12 Figure 2 provides a comparison of the Island's land-won sales figures over the period 2013 – 2022 against the council's Aggregate Provision Rate (APR)[6]. It can be seen that over this period total sand and gravel sales move from not meeting the APR given to the Island, to exceeding the rate for the last four reporting years, 2019 to 2022 inclusive. Whilst sales in the last four years have been variable, with all four years being in excess of the APR figure after a prolonged period (2011 – 2018) of being below, these recent years have contributed to the upward trend in sales.

Figure 2: Comparison of land-won sand and gravel sales and the apportionment on the Isle of Wight



2.13 In contrast to the Island, 2021 sand and gravel sales in the South East had increased from 2020 (at 6.6 Mt) and were 19% higher than the previous year and similarly higher than average sales levels[7]. However as with local sales on the Island, the 10-year average sales trend for the South East is modestly increasing.

2.14 The potential issue raised in previous LAAs concerning the appropriateness of the APR, being that sales have never achieved this target since it was set in 2008, no longer seems relevant. While only the last 4 years of sales have exceeded the 100,000t rate in the last ten years, the overall trend indicated sales passing this figure around 2019. The development of a new minerals and waste plan for the Isle of Wight will provide the opportunity to reconsider what is an appropriate APR, taking into account the overall trend in sales for the last ten years.

215 The nature of the most recent sales seems to indicate a period of growth in terms of local activities dependent upon the supply of minerals. However, given the current economic climate there is uncertainty if the demand will continue on-trend. It is likely that external political and economic factors[8] will play a key role in determining sales over the short term (next 2 to 5 years). The next two to three year monitoring period will be important in understanding if the overall trend in increasing sales over the last decade is stabilising or set to continue.

[6] Previously referred to as apportionment or LAA rate(s)
[7] South East England Aggregates Working Party Annual Report 2021
[8] As at September 2022 formation of a new Government, cost of living crisis and related cost of energy.

2.16 The growth policies for the Island remain, the principle one being the target of 520 housing units per annum and therefore Section 4 of this assessment looks at how the Island Plan Core Strategy is performing in relation to delivering development and how this correlates to land-won sand and gravel sales.

Current supply

2.17 The supply of land-won aggregates on the Isle of Wight was from four of the five permitted sand and gravel extraction sites, the details of which are presented in Figure 3 and Table 4.

Figure 3: Active sand & gravel sites on the Isle of Wight

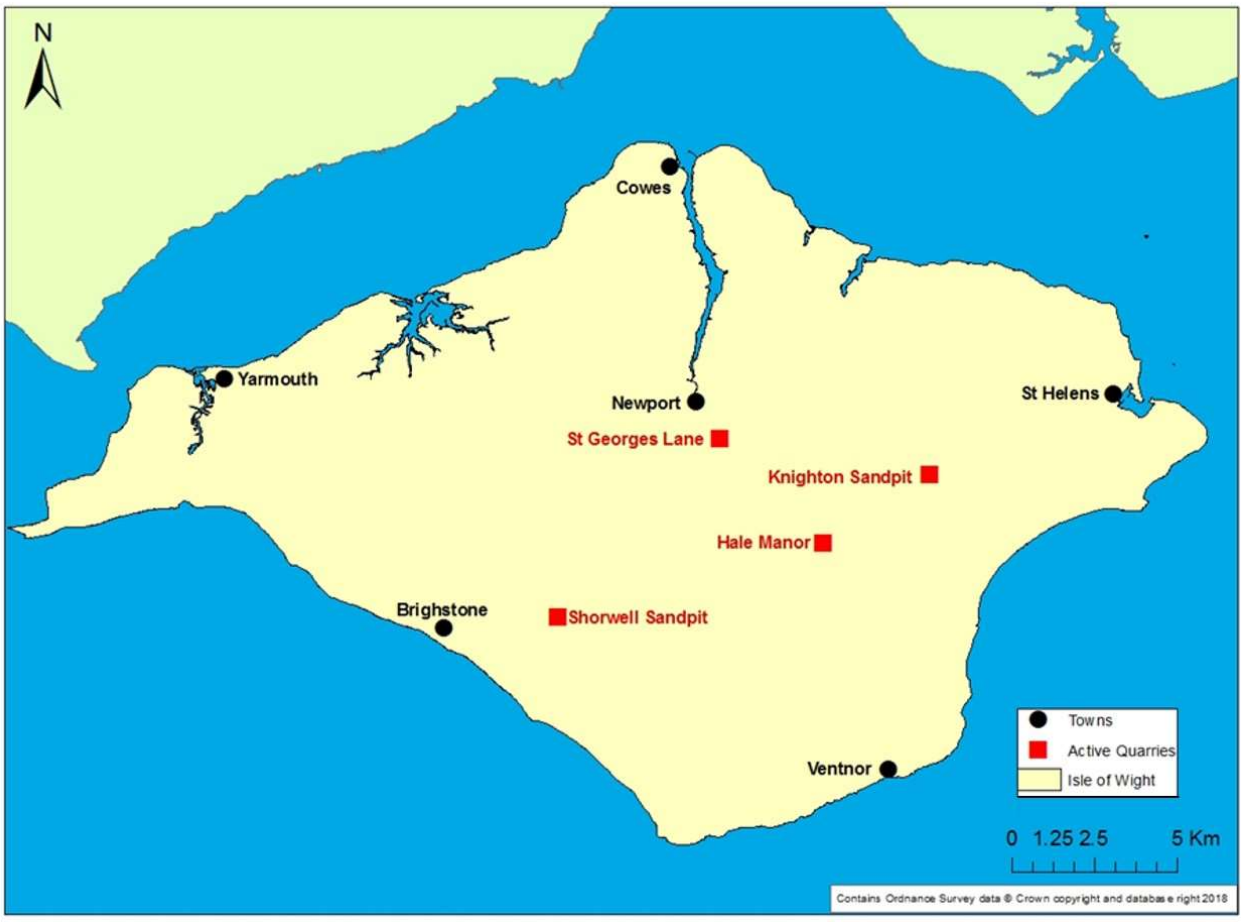


Table 4: Permitted sand and gravel quarries on the Isle of Wight

Site	Operator	Aggregate	Active production in 2022
Shorwell Sandpit	Haslett Farm/Draper	Soft sand	Yes
Knighton Sandpit	Knighton Sandpit Ltd	Sharp & soft sand	Yes
Cheverton Chalk & Gravel Pits	Cheverton Aggregates	Gravel	No
St Georges Down/Blackwater	Wight Building Materials Ltd*	Sharp sand & gravel	Yes
Hale Manor Farm Quarry	Wight Building Materials Ltd	Sharp sand & gravel	Yes

*Formerly Bardon Vectis (Aggregate Industries)

2.18 Taking into account all reserves for aggregate use (as reported through the latest annual mineral monitoring in 2022), these five sites represent a total sand and gravel reserve of approximately 483,652 tonnes. There have been no mineral related permissions during 2022.

Table 5: Isle of Wight Reserves at 31 December 2022 (tonnes)

Mineral	Soft sand (building sand)	Sharp sand & gravel	Sand & gravel or hoggin for construction fill	Total for aggregate use
Sand & gravel	c	c	c	483,652
	Permitted 2022			nil
Total				483,652

AM2022

Isle of Wight Imports

2.19 The 'severance' factor of being an island MPA does have a significant and unique influence on the movement of aggregates across the MPA boundary. The Island currently does not export any aggregates. However, as well as being a producer of sand and gravel the Isle of Wight supplements this production with imports.

2.20 With regards to sand and gravel these imports are exclusively marine-won, with some being landed directly on the Island from point of extraction, while amounts can come via aggregate wharves in neighbouring Hampshire. There is no other movement of sand and gravel into the Island from any other Mineral Planning Authority Area. Marine-won imports are discussed further under Marine-won sand and gravel and in Section 4.

Long-term capacity

2.21 As at 31st December 2022, the council had permitted sand and gravel reserves of 483,652 tonnes as reported through the AM2022 survey returns. Table 6 presents various landbank lengths for the Island for both the most recent reporting period (2022) and the two previous years. The three levels of APR used are;

- 100,000tpa as agreed through the proposed changes guidelines;
- 92,084tpa based on average sales for the last 10 years; and,
- 108,849tpa based on the sales for the latest reporting period (2022)

Table 6: Isle of Wight landbanks (years)

Permitted Reserve (tonnes)	Date	Proposed Changes Guidelines (0.1mtpa)	2013-22 average sales (92,084tpa)	2022 sales (108,849tpa)
475,437	31.12.20	4.7	5.4	**4**
498,962	31.12.21	4.9	5.6	**4.2**
483,652	31.12.22	4.8	5.2	**4.4**

2.22 The Island's permitted reserves are below the seven year landbank indicator. Based on current (2022) sales the Island has just over four years' worth of permitted reserve. However, given the ten year high in sales of 2019 and the variation in sales year on year for both the ten and three year period, using the ten year sales average (92,084t as opposed to 100,000 or most recent 108,849t) seems

more realistic, giving a landbank figure of just over 5 years. Additional capacity for land-won aggregate is discussed in Section 4.

Isle of Wight Soft Sand

2.23 2022 is the first monitoring year that the MPA has been able to provide sufficient figures on soft sand to be able to report on provision separate from sand and gravel. The sales figures of soft sand on the Island for the most recent 10 year period are detailed in Table 7 below.

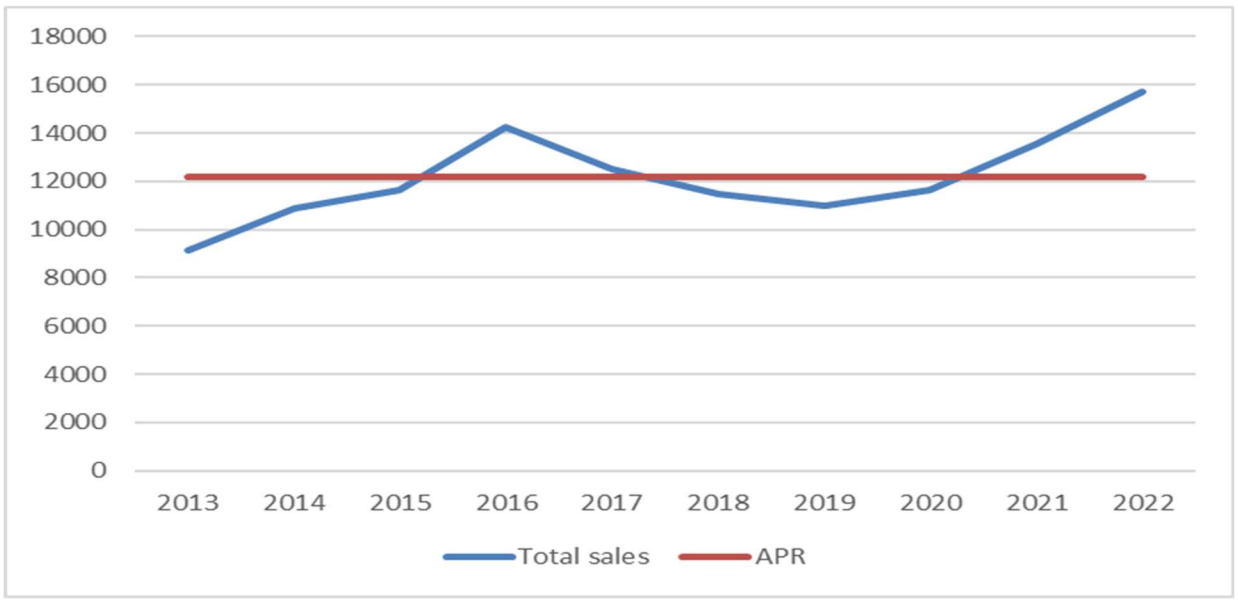
Table 7: Land-won soft sand sales in the Isle of Wight, 2013 – 2022 (tonnes)

Year	2013	2014	2015	2016	2017	2018	2019	2020	2021	2022	Ave.
Sales	9,153	10,889	11,623	14,267	12,504	11,463	11,002	11,652	13,544	15,716	**12,181**
								11,652	13,544	15,716	**13,637**

2.24 The overall trend is one of generally increasing sales since 2013. There are variations, with two distinct peaks in 2016 and 2022. Whilst sales fell between 2017 and 2019, sales figures subsequently increased from 2019 year on year to the current 10 year high of just under 16,000 tonnes in 2022 (29% above the 10 year average). The 3-year average is higher than the 10-year average, reflecting both the recent increase in sales and the sales peak in 2022.

2.25 As there has been no previous Aggregate Provision Rate for soft sand the 10 year average sales figure has been taken as the rate in the interim until the preparation of a new mineral and waste local plan. Figure 4 provides a comparison of the Island's land-won sales figures over the period 2013 – 2022 against the APR. It can be seen that over this period total soft sand sales move from not meeting the APR, to exceeding the rate in two sales peaks of 2016 and 2022. The last 2 reporting years have contributed to both the most recent upward growth in sales (from a dip after the 2016 peak) and an overall increasing sales trend over the last 10 years.

Figure 4: Soft sand sales 2013 - 2022 against the APR



Current supply

2.26 The supply of soft sand as reported through sales in 2022 is from 2 quarries on the Island being Knighton Sandpit and Haslett Farm/Shorwell Sandpit. This does create a confidentiality issue, similar to the Island wharves and no statements or conclusions made in the LAA should be attributed to an individual operator or quarry unless explicitly stated as such.

2.27 Taking into account all reserves for aggregate use (as reported through the latest annual mineral monitoring in 2022), these 2 sites represent a total soft sand reserve of approximately 184,317 tonnes. There have been no mineral related permissions during 2022.

Table 8: Isle of Wight Soft sand Reserves at 31 December 2022 (tonnes)

Mineral	Soft sand (building sand)	Total for aggregate use
Sand & gravel	C	184,317
	Permitted 2022	nil
Total		184,317

AM2022

2.28 It should be noted that for the required 10 years' worth of soft sand figures, 2 years (2014 and 2021) have had to be estimates.

Capacity

2.29 As at 31st December 2022, the council had permitted soft sand reserves of 184,317 tonnes as reported through the AM2022 survey returns. Table 9 presents various landbank lengths for the Island for both the most recent reporting period (2022) and the two previous years. The three levels of APR used are;

- 13,637tpa based on average sales for the last 3 years;
- 12,181tpa based on average sales for the last 10 years; and,
- 15,716tpa based on the sales for the latest reporting period (2022)

Table 9: Isle of Wight Soft sand landbanks (years)

Permitted Reserve (tonnes)	Date	2020-22 average sales (13,637tpa)	2013-22 average sales (12,181tpa)	2022 sales (15,716tpa)
146,848	31.12.20	10.8	**12**	9.3
197,683	31.12.21	14.5	**16.2**	12.6
184,317	31.12.22	13.5	**15.1**	11.7

2.30 The Island's permitted reserves are above the seven year landbank indicator. Based on current (2022) sales the Island has over 11 years' worth of permitted reserve. Using the ten year sales average gives a landbank figure of over 13 years.

Crushed Rock

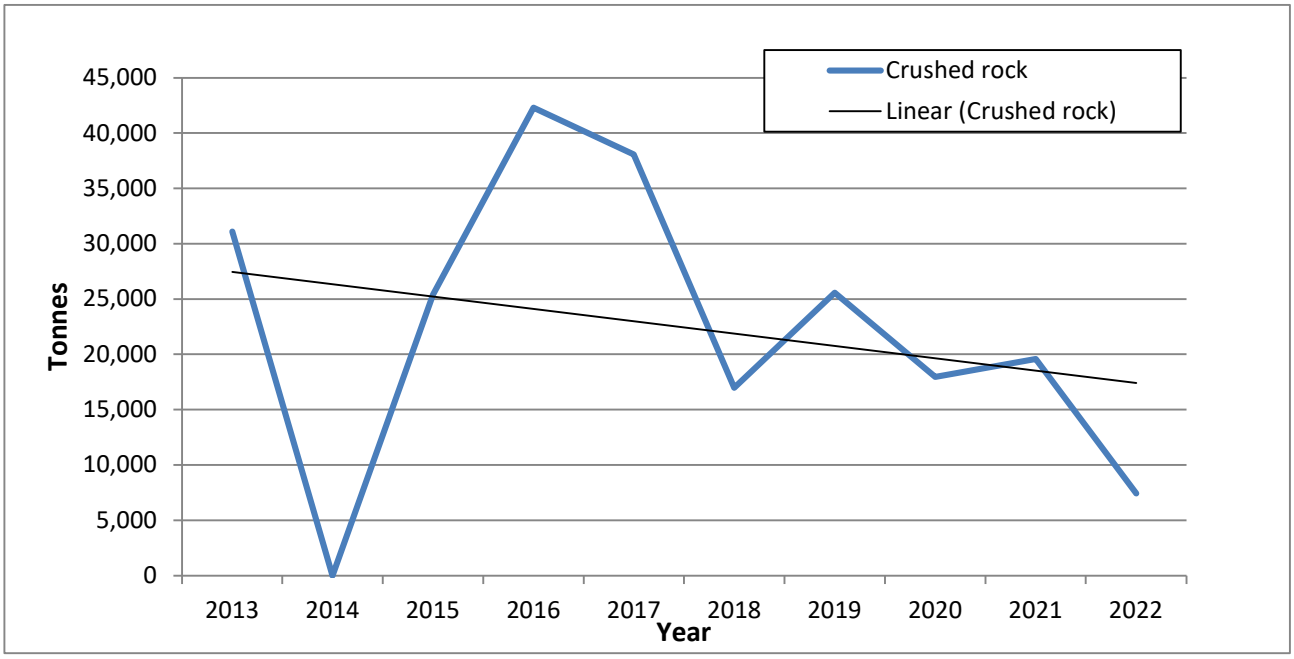
2.31 Crushed rock sales are primarily from imports via the Island's two aggregate wharves (both located on the River Medina). Having just two aggregate wharf operators does mean that reported figures are subject to confidentiality.

Table 10: Marine imported crushed rock

	10 Year Average	3 Year Average
Crushed Rock Sales (Tonnes)	**22,432**	**14,980**

2.32 The pattern in sales of crushed rock over both the ten and three year period has been erratic (see Figure 5), with the absence of any sales in 2014 being the extreme in terms of a year's performance difference from the average. In contrast sales in 2016 were at their highest over the last ten years. The last three years of sales are closer to the overall downward trend in sales over ten years, but still variable.

Figure 5: Crushed rock sales on the Isle of Wight



2.33 In addition to imported material there is a relatively sizeable reserve of Limestone present on the Island at the inactive site, Prospect Quarry. However, this material is only suitable for constructional fill and therefore does not meet the Island's needs.

2.34 While not formally reported through the annual monitoring process the provision of chalk locally does play a role and recorded sales for 2022 were equivalent to 10% higher than that of marine imported crushed rock. That is not to say that the sales of chalk displace those of crushed rock, while there may be some cross-over in use, the two products are different. Use (and therefore demand) of chalk is understood to be primarily driven by the rural nature of the Island, providing materials for constructional fill and agricultural lime.

Marine-won Sand and Gravel

2.35 Marine-won sand and gravel is a major source of primary aggregate on the Island and is also the principal alternative source to land-won sand and gravel. The marine-won sand and gravel that is landed on the Isle of Wight is dredged primarily from the English Channel and landed at wharves located on the Medina Estuary (see Figure 3) at Cowes and Newport.

2.36 The mineral rights for marine sand and gravel are owned by the Crown Estate, up to the edge of the continental shelf. It is understood that the Island receives the vast majority of its marine aggregates from the 'South Coast' region.

2.37 The Crown Estate Annual Review 2022, Marine Aggregates states with regards to supply;
"*… extracting 15 to 20 million tonnes from the seabed annually. Much of this is used for building houses, transport infrastructure, replenishing beaches and improving coastal defences…*

Onshore resources are becoming increasingly constrained, particularly in the South East of England and London. In 2018, marine aggregates satisfied 22% (13.7 million tonnes) of the total construction needs for sand & gravel in Great Britain."

2.38 The report goes on to state it's purpose as helping "*… local authorities understand the contribution that marine aggregates can make, by identifying offshore sources and providing information on supply routes. In turn, this is intended to support local authorities in complying with the National Planning Policy Framework, which requires mineral planning authorities to demonstrate they have a steady and adequate supply of aggregates for their requirements through Local Aggregates Assessments.*"

2.39 The Crown Estate report provides an analysis by region and the following key points summarise the report's commentary on the South Coast region;

- 8.13 million tonnes can be extracted from 15 licences;
- Current estimates suggest there are 22 years of primary marine aggregate production permitted;
- During 2021 64.2% of material extracted from the region was delivered to the South Coast.

2.40 The Crown Estate stated in response to consultation on the first LAA (2012) that "*existing licences within viable steaming time to Cowes will be able to provide as much sand and gravel as the current wharves can process and more than meet the whole demand for construction aggregate in the Isle of Wight*." Based upon the above licence and production figures it can be assumed that this remains the case.

2.41 Due to the closure of Kingston Wharf in 2018, the sales for Isle of Wight wharves are now confidential. The 3 and 10 year average sales for marine sand and gravel are set out below.

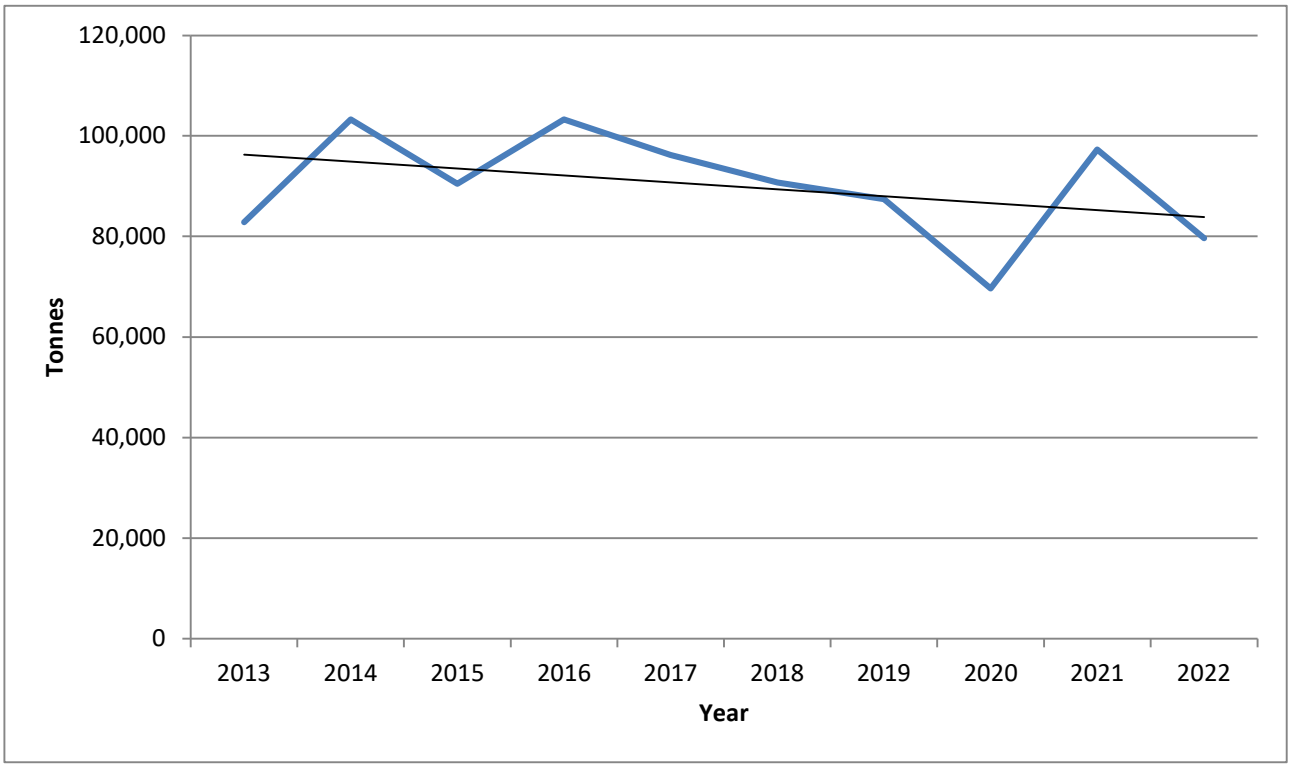
Table 11: Marine-won sand & gravel sales on the Isle of Wight

	10 Year Average	3 Year Average
Marine-won Sand & Gravel	**90,083**	**82,202**

2.42 It is difficult to identify any clear trend (in contrast to land-won sand and gravel sales), although there does seem to be a pattern of rise and fall over a number of years, with an overall gently decreasing trend. Comparing the 10 and 3 year sales averages reveals the 10 year sales average being slightly higher than the 3 year figure, reflecting the lower sales in recent years, with 2020 being the lowest recorded sales over both the 10 and 3 year period. The change in sales between the low in 2020 to the above average figure of 2021 is the most significant over the 10 year period, probably reflecting the impact to and recovery of the economy as a result of the covid pandemic.

2.43 Sales of marine won sand and gravel for the most recent monitoring year has decreased from the previous year (2021) and while not as low as the drop in sales recorded in 2020, they are still below the 10 and 3 year averages and the overall decreasing trend in sales. More insight can be gained by a comparison to the performance of indigenous land-won sales of sand gravel (see section 4).

Figure 6: Marine-won sand & gravel sales on the Isle of Wight (thousand tonnes)



Island Aggregate wharf capacity

2.44 Based on total aggregate wharf imports for 2022 it is possible to estimate there was a spare capacity at wharves on the Island of some 74%. This is an increase on the previous year, where for 2021 spare capacity was at 65%. This reflects the decrease in sales of marine-won aggregate in 2022.

2.45 Due to the limited number of wharves and the confidentiality issues this raises, it is not possible to discuss any further detail on capacity and limitations, and the generalisations made here about Island aggregate wharves should not be applied at the individual site level. See Section 1 for further information on the data limitations of the LAA.

Recycled and Secondary Aggregate

2.46 Recycled and Secondary Aggregate sales are collected yearly as part of the surveys carried out by mineral planning authorities. There were two active recycled aggregate sites on the Isle of Wight in 2022. There were no secondary aggregate sites.

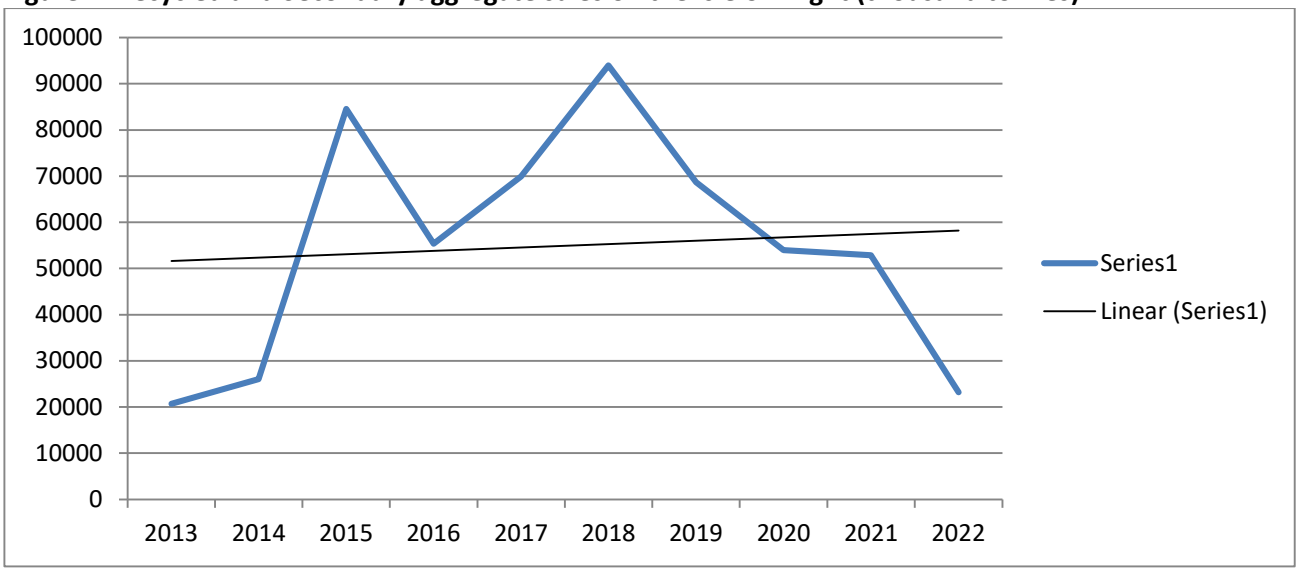
2.47 The sales figures of recycled and secondary aggregates on the Isle of Wight for the most recent 10-year period, 2013 - 2022, are detailed below.

Table 12: Recycled & secondary aggregate production on the Isle of Wight 2013 – 2022 (tonnes)

Year	2013	2014	2015	2016	2017	2018	2019	2020	2021	2022	Ave.
Sales	20703.52	26021	84552	55363	69912	94000	68639	53941	52834	23186 c	**54,915**
								53941	52834	23186 c	**43,320**

2.48 The sales of recycled and secondary totalled just over 23,000 tonnes, which is less than halve of the previous year and results in a continuing significant decrease from a 10 year high of over 94,000t in 2018. When considering average sales over the 10 and 3 year period it is interesting to note that while the 10 year figure has decreased slightly, the 3 year figure has seen a greater decrease from the previous reporting year. This reflects the fact that the significant 10 year high sales figure of 94,000t in 2018 is now omitted from the 3 year figure, and the sales for the most recent year is below the 3 and 10 averages and well below the slightly increasing trend in sales over the longer time period.

Figure 7: Recycled and Secondary aggregate sales on the Isle of Wight (thousand tonnes)



2.49 The total capacity for recycled aggregates processing on the Isle of Wight is 180,000 tonnes per annum. However, when accounting for sites which did not respond to the survey, temporary permitted sites as well as potential unauthorised sites, the total capacity is likely to be higher.

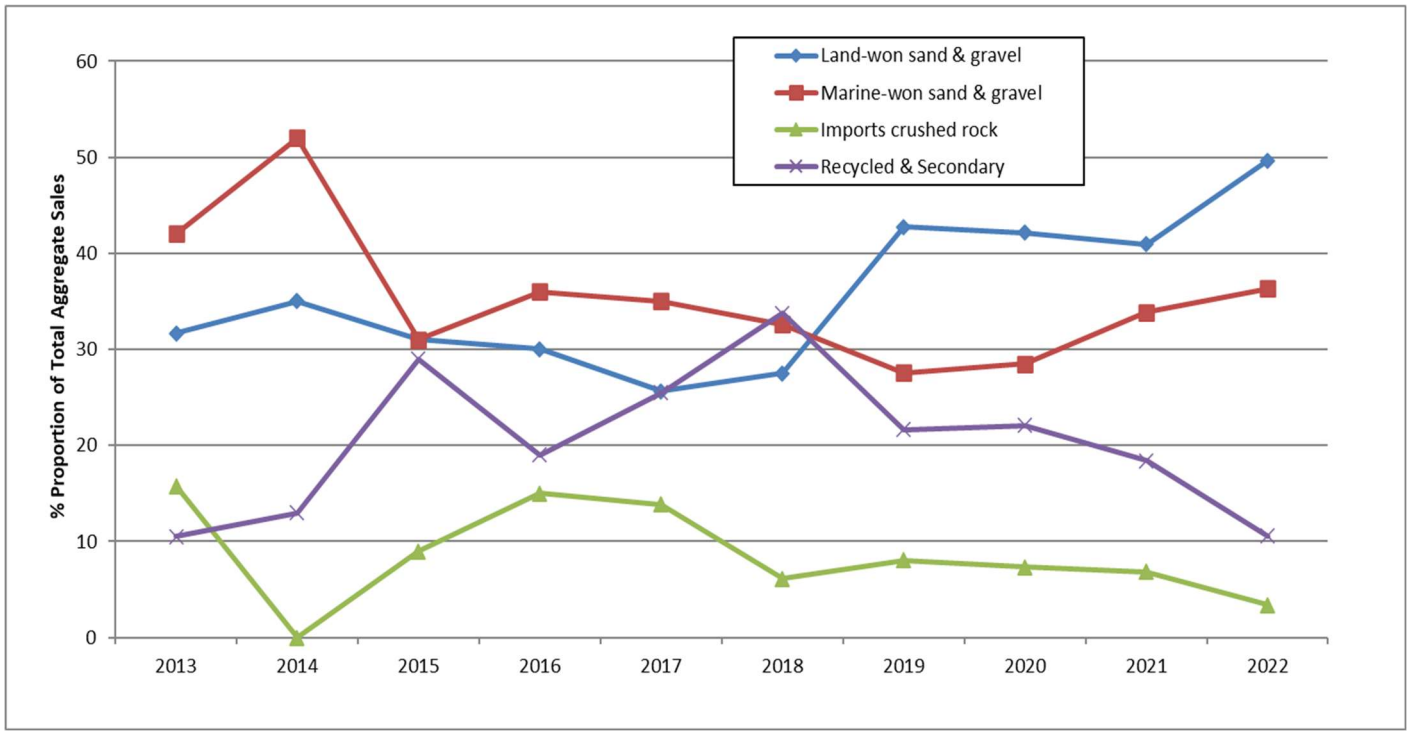
3. Total Aggregate Supply

3.1 The supply of aggregates on the Isle of Wight is based on a balanced supply arising from different sources; land and marine-won sand and gravel, recycled and secondary aggregate, and imported crushed rock. This supply ensures that reliance is not placed on any one source. Table 13 presents the ten-year average sales of each aggregate source to the Island and Figure 9 shows the proportion of the total supply that each of those sources represents.

Table 13: Total Aggregate Sales on the Isle of Wight, 2013 – 2022 (Thousand tonnes)

Aggregate	2013	2014	2015	2016	2017	2018	2019	2020	2021	2022	Average 2013-22
Land-won sand & gravel	62	68	90	87	70	76	135	103	117	108	**92**
Marine-won sand & gravel	82	103	90	103	96	90	87	69	97	79	**90**
Imports crushed rock	31	0	25	42	38	16	25	17	19	7	**22**
Recycled & Secondary	20	26	84	55	69	94	68	53	52	23	**54**
Total	**197**	**198**	**290**	**288**	**274**	**278**	**317**	**244**	**287**	**219**	**259**

Figure 8: Proportion of Total Aggregate Supply



3.2 Table 14 provides a comparison of the average sales total for each aggregate source against the identified capacity for that source to understand where additional provision may be required, or contrastingly where contingency capacity is available.

Table 14: Comparison of average aggregate sales against identified capacity on the Isle of Wight

Type/source of aggregate	Average annual sales (2013-22)	Identified annual capacity	Balance
Land-won sand and gravel	92,084	100,000	**7,916**
Marine-won sand and gravel	90,083	340,000 c	227,485 **c 74%**
Imported crushed rock	22,432		
Recycled/secondary aggregate	54,915	180,000	**125,085**
Total	259,514	620,000 c	360,486 **c 58%**

All figures in tonnes

3.3 The identified annual capacity for marine-won sand and gravel and imported crushed rock has been merged, reflecting use of the same wharf resources to land the mineral, regardless of its type or source.

3.4 In respect to land-won sand and gravel, while the identified capacity is currently sufficient to meet the average sales, the last 4 years of sales have exceeded this. While the 10 year sales average is below the identified capacity of 100,000tpa, the average for the last 3 years of sales is above. This combined with an overall increasing trend in sales, a permitted reserve below 7 years and no new permissions within the monitoring year indicates that there is some urgency to both reconsider the capacity figure and from this identify future provision to provide some certainty of future supply from this source.

3.5 The council received a planning application in April 2022 for the extraction of 900,000 tonnes of sand and gravel[9], yet to be determined, but has the potential to bring permitted reserves in excess of 700,000 tonnes, providing the Island with a landbank of permitted sand and gravel reserves in excess of 7 years. In 2023 the council has received 2 EIA screening opinion requests, which if subsequent applications were approved would result in over 500,000 tonnes of sands and gravels of varying composition. While both screening opinion requests are from existing quarries, in effect proposed extensions to existing operations, they are also within the AONB.

3.6 The council is due to start preparation of a new Minerals and Waste Development Plan Document (DPD) in 2024 once the Island Planning Strategy has progressed to examination, with a Call for Sites consultation. This Minerals & Waste DPD will be the mechanism by which the APR figure (and thereby land-won sand and gravel capacity) is determined as well as sources for future supply. However, given both the timescales for plan preparation and adoption and the various permitting processes associated with new indigenous supply, the council in it's role as the MPA may need to engage the local mineral operators prior to the plan-making process being complete, to understand exiting reserves and capacity and future intentions.

[9] Reference 22/00654/FUL, Proposed extraction of sand and gravel and restoration to agriculture, Land At Palmers Farm Brocks Copse Road Wootton Ryde Isle Of Wight PO33 4NP

3.7 Table 14 demonstrates there is a significant amount of available alternative infrastructure capacity for aggregate on the Isle of Wight, considered to be sufficient to meet the Island's needs should this be required. This is discussed in section 4.

4. Future Aggregate Supply and Demand

4.1 The supply of land-won aggregate in England is based on the Managed Aggregate Supply System (MASS) which assists MPAs in planning for a steady and balanced supply of aggregates. Hitherto MASS is based on aggregate 'guidelines' published from time to time, from which Aggregate Working Parties – comprising industry, MPAs and Government representatives provide advice to MPAs. Current advice on the amount of land-won aggregate supply, or Aggregate Provision Rate for the Isle of Wight is 0.1 mtpa (or 100,000 tpa) subject to testing in the preparation of local mineral plans.

4.2 The MASS system has been subject to review following the publication of the NPPF. This has resulted in the publication of guidance on the Managed Aggregate Supply System which recognises the principles of the MASS but alongside the need to determine APRs locally. The guidance sets out the LAA should cover an assessment of total aggregate supply (recycled and secondary aggregate, marine-won aggregate, imported aggregate and land-won aggregate) as well as the following issues which have all been covered in this LAA:

- a forecast of the demand for aggregates based on the average of 10-years sales data and other relevant local information;
- an analysis of all aggregate supply options, as indicated by landbanks, mineral plan allocations and capacity data e.g. marine licences for marine aggregate extraction and the potential throughputs from wharves. This analysis should be informed by planning information, the aggregate industry and other bodies such as local enterprise partnerships; 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.

4.3 Policy SP9 (Minerals) of the core strategy sets a figure of 0.1 million tonnes per annum of land-won sand and gravel. Monitoring returns for the period 2013 – 2022 show on average the Island has been producing 92,084 tonnes of sand and gravel per year. While the overall trend is one of generally increasing sales since 2013, there are variations, with two distinct peaks in 2015 and 2019. Annual sales over the last ten years have ranged from around 62,000 tonnes to over 135,000 tonnes.

4.4 Looking at the 3 year trend gives a different picture, with less significant change over a shorter period of time, indicating a relatively (in comparison to the range in 10 year sales) stable period of sales. It should be noted that all 3 years sales have been high and in excess of the APR. There will almost certainly be some implications on sales as a result of the global pandemic, cost of energy volatility and economic uncertainty (at time of publishing both interest rates and the rate of inflation are high). However, the continuing strong sales over the last three years appear to run counter to the market context. It may be that there is a delay in working through economic implications through to the Island market.

4.5 In terms of performance against the APR then certainly the last three years of sales can be viewed positively, although the implications of sales exceeding 100,000 tonnes over the last four years has had an impact on permitted reserves and the remaining landbank which is less than 7 years.

4.6 While the average of ten years sales data has been discussed in Section 2, other relevant local information included in the consideration of future demand for aggregates is the provision of new housing on the Island and associated infrastructure investments. Sand and gravel are used in the construction industry for purposes such as the making of concrete and mortar or for roadstone or drainage material. The level of construction, including house building and infrastructure, therefore

largely drives the demand for sand and gravel and are key local factors to consider when determining a provision figure for the Isle of Wight.

4.7 Since the adoption of the Core Strategy in 2012 there has been a significant shortfall in the delivery of housing on the island against the identified annual housing number in the local plan (up to 2017/18) and the Government's standard method housing number (introduced in 2018 and used as the Core Strategy was over 5 years old). A total of 4,192 homes have been completed in the same 11 year period - a shortfall of 2,075 homes.

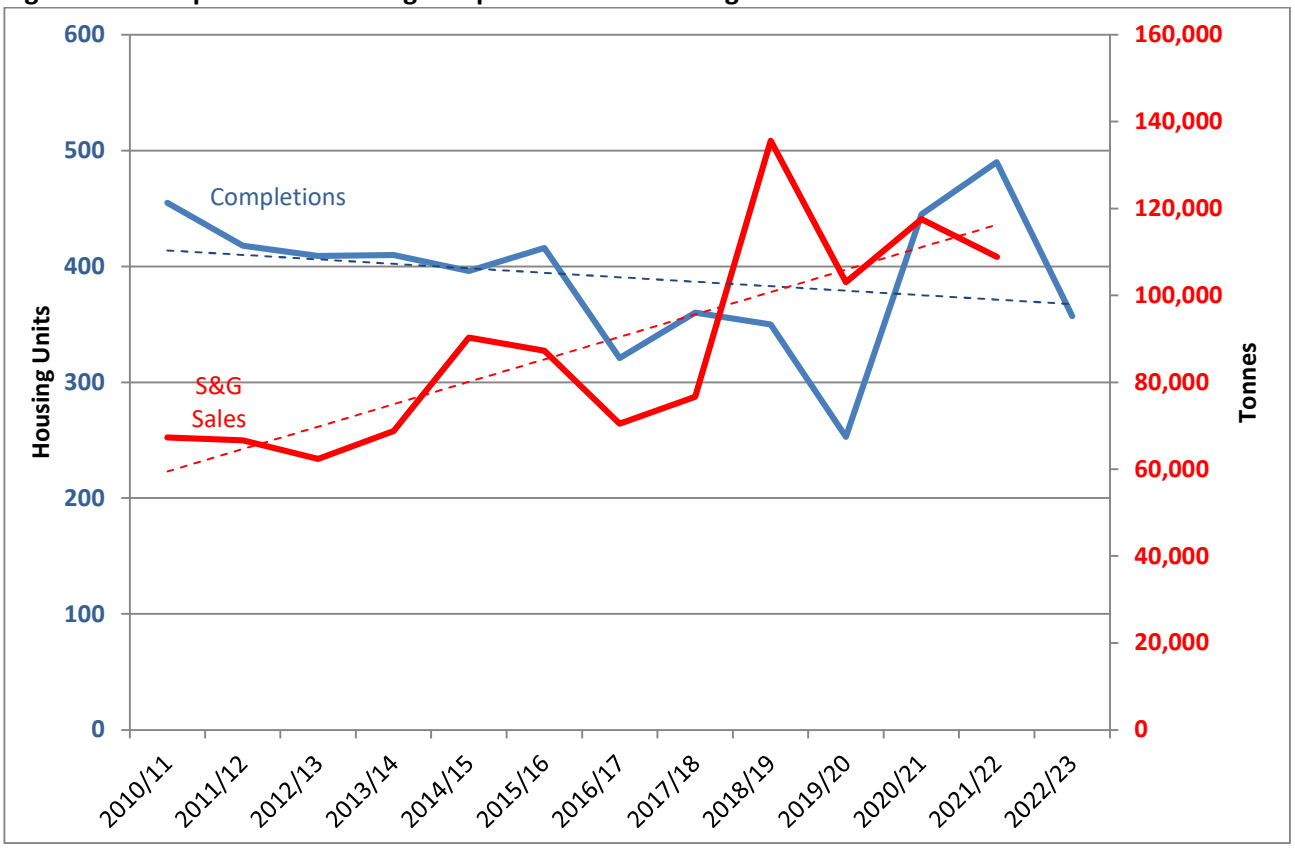
Table 15: Comparison of annual housing completions against identified requirement

Year	12/13	13/14	14/15	15/16	16/17	17/18	18/19	19/20	20/21	21/22	22/23	Total
Homes required	520	520	520	520	520	520	675	616*	458*	668	730	**6267**
Actual homes built	409	410	396	417	321	360	350	253	445	490	357	**4192**

*standard method reduced due to Covid pandemic

4.8 As can be seen from Figure 10, while housing completions on the Island for last 11 year monitoring period have overall been in decline, 2 of the last 3 years have seen an upturn (still below the identified amount required using the standard method). Previous LAA work suggests that the level of housing completions mirrors to some extent the demand for sand and gravel. There was a significant divergence in this trend for 2019/20, however the subsequent and latest 3 years mirror an increase in aggregate sales with completions of housing (see sales and completions for 2020/21 and 2021/22) followed by a drop-off in aggregate sales and then reduced completions.

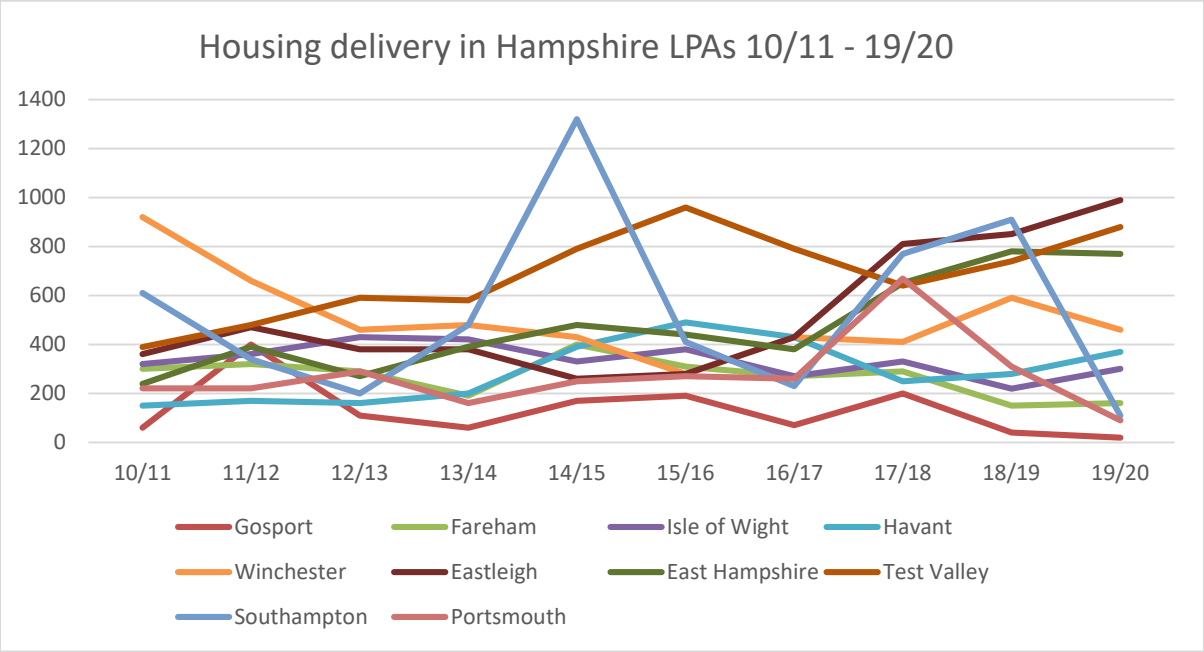
Figure 9: A comparison of housing completions and sand & gravel sales



4.9 Analysis of IWC monitoring data indicates that there seems to be a 'ceiling' to the delivery of housing on the Island, as it has averaged 382dpa in the last 11 years since adoption of the Core Strategy, and 460dpa in the last 20 years.

4.10 One indicator of this 'ceiling' is that housing delivery is fairly consistent on the island, with less fluctuations between 'high' and 'low' years. Reviewing this consistency when compared to housing markets in the region shows that across all Hampshire local planning authorities in the 10 year period from 2010/11 to 2019/20, the IOW is the most consistent in terms of delivery rates and shows the least amount of 'peaks and troughs' experienced by mainland authorities, as shown on the graph below. Fluctuation between the highest and lowest delivery years is the least on the IOW out of all 10 Hampshire authorities. This is partly reflective of minimal reliance on large, strategic sites built out by major national housebuilders, which can provide greater volatility to delivery rates.

Figure 10: Housing delivery across Hampshire from 2010/11 – 2019/20



4.11 Another indicator is the 'conversion rate' between permissions granted and units completed. The IWC has granted planning permission for 7,202 homes in the 11 year period since adoption of Core Strategy, at an average of 654dpa. With an average completion rate of 382dpa in the same period, this gives a 'conversion rate' of 58% which is high when gauged against other similar sized local authorities[10], suggesting the housing market is operating at capacity.

4.12 This then raises the question that if the housing sector has been consistent in delivery (regardless of whether this is viewed as under-delivery) what has caused the recent rise in aggregate demand and the significant spike in sales of indigenous land-won sand and gravel in 2019 and remaining high in 2020? With a downturn in both aggregate sales and completions the latest figures do suggest there is a relationship between aggregate sales and housing completions on the Island, albeit there may be a delay between aggregate and housing performance. Given both the insular nature of the market and relatively limited construction activity outside of housing, this seems reasonable to draw, with future years monitoring providing further insight into the nature of this relationship.

[10] The Island Plan - Service Details (iow.gov.uk) – IWC Assessment of Supply Report, Three Dragons 2020

Contingency planning

4.13 To contribute to the delivery of the mineral target (i.e. 100,000tpa sales of sand and gravel) and following technical work and assessments of sites promoted to the council, the council has allocated six sites. The assessment of the potential for mineral sites on the Island was undertaken between February 2009 and October 2010 (as documented in '*Assessment of the Potential for Mineral Sites on the Island – Site Options Report*' Entec UK Ltd, October 2010). The assessment has been used to inform the selection of sites for allocation, as listed in Table 16.

Table 16: Land-won provision on the Isle of Wight to 2027

	Total sand & gravel (tonnes)
Annual Apportionment	100,000
Total Plan Requirement: **Annual apportionment x plan period (16yrs)**	1,600,000
Permitted Reserves	
Sub-total	483,652
Allocated sites	
MA1: Crockers Farm	
MA2: Lavender Farm	
MA3: Cheverton Farm	c
~~**MA4: Blackwater Quarry (western extension)**~~	
MA5: Cheverton Gravel Pit	
MA6: Blackwater Quarry	
Sub-Total	1,770,000*
Total	
Permitted reserves + Plan sites	2,253,652
Contingency	
Total	653,652
Annual (over a remaining 5 years)	130,730

*Estimated tonnage of aggregate in areas allocated in policy SP9 of the Adopted Core Strategy

4.14 Based on permitted reserves and allocated sites, the council has a sufficient provision of land-won sand and gravel to meet the apportionment figure adopted by the (core strategy) plan, over its lifetime. There is a significant over provision, primarily as a result of allocated sites. This over-provision provides the council with a significant contingency from which to deal with any likely continuing increase in demand as has been recorded in the last 4 years.

4.15 Considering the separate provision of soft sand, using the ten year sales average gives a landbank figure of over 13 years. While this in itself should provide a sufficient contingency, the supply is not without it's vulnerabilities. Foremost is that the permitted reserve relates to only 2 quarries and the risks associated with limited sources of supply. Another is the potential to supplement dwindling supplies of sand and gravel with higher grades of sand.

4.15 There is existing capacity at the Island's aggregate wharves. While the significance of this capacity with regards to the importation of crushed rock is already recognised, there has been an ongoing shift in supply of sand and gravel, from a majority of indigenously sourced land-won, to marine-won, to back to land-won (see Table 17 below). 2015 was the first monitoring period in ten years where

the provision from land-won and marine-won had been equal. Subsequently for 2016 the balance of supply shifted back to a marine-won majority, with the recent peak in land-won sales also coinciding with a shift back to land-won. This would seem to indicate that there is a relationship between these 2 sources of supply, but other than changes in percent provision further work will be required to better understand this. This is likely to be critical in providing both contingency and resilience in supply.

4.16 As existing and allocated sand and gravel sites are worked out and deposits become increasingly constrained, the shift to marine-won may well increase, in which case the total capacity of the Island wharves will be critical. This is likely to be beyond the existing planned timeline (i.e. post 2027) but underlines the strategic importance of the two aggregate wharves to the Island and highlights a potential vulnerability should either of these assets be lost.

Table 17: Indigenous land-won vs marine-won sand and gravel sales

Year	Land-won	Marine-won	% split of total provision (land/marine)
2004	144,400	91,000	61/39
2005	C	118,000	n/a
2006	117,000	148,000	44/56
2007	87,997	136,000	39/61
2008	88,000	100,308	47/53
2009	62,713	75,516	45/55
2010	90,163	112,000	45/55
2011	67,303	110,000	38/62
2012	66,600	90,303	42/58
2013	62,407	82,838	43/57
2014	68,760	103,276	40/60
2015	90,306	90,460	50/50
2016	87,263	103,313	46/54
2017	70,431	96,211	42/58
2018	76,625	c	46/54
2019	135,612	c	61/39
2020	103,055	c	60/40
2021	117,539	c	55/45
2022	108,849	79,671 c	58/42

4.17 The NPPF allows for MPAs to consider the contribution that secondary and recycled aggregate can make as substitutes for primary materials. An assessment of capacity for recycled and secondary aggregate has already been provided in this LAA and has shown there to be significant available capacity. The sales of recycled and secondary aggregate over the last 10 years have increased, with a peak in 2018 where this source was proportionately the single most significant source. Sales have subsequently fallen (to a 10 year low) in 2022 providing increased potential capacity. Similar to marine-won this highlights the importance of sources other than land-won sand and gravel and how broad the range in supply of aggregates on the Island is, despite year-to-year variations.

4.18 In terms of future capacity provision for hard rock imports to the Island, future opportunities do exist, as identified in the current aggregate wharf capacity. As discussed previously, this capacity is shared, primarily with marine-won sand and gravel, so the sum requirements of all resources using the wharves will need to be considered in order to understand any impacts provision of one material type might have on the supply of another. Certainly more work can be done to better understand the balance of imports and to see if the identified capacity can be attributed in any way to mineral

type. Further investigation needs to be carried out to update the understanding on the uses of indigenous chalk and it's relationship, if any, to crushed rock sales.

5. Implications of Local Approach

5.1 The Island APR has been tested and verified at the local level by key stakeholders, including significantly the Island's mineral operators. The Isle of Wight is unique in being an MPA with no adjoining MPA area. As such it operates in relative isolation and independence, with comparatively little inter or intra-regional flows of aggregate. This effectively takes away the need to more accurately reflect market areas. The levels of provision and demand set out in this LAA also demonstrate that the Island's local aggregate provision will have very little effect when considering these elements in the context of a wider regional market basis.

5.2 However, at the MPA level there are some issues with the APR figure. Primarily that the overall trend in sales of land-won sand and gravel on the Island based upon the most recent ten years exceeding the APR in 2019 and the last 4 years of sales have been in excess of this 100,000t figure. If sales in the near future continue in excess of the existing APR this will provide a start point from which to reconsider the existing APR and any new approach (including APR) as part of the evidence base work for the mineral local plan in 2024.

5.3 The recent increase in land-won sales has been accompanied by a shrinking permitted reserve, such that the Island does not have a 7 year landbank for land-won sand and gravel. This highlights two issues in terms of supply. The first is the range in sources of supply and how their contributions have varied, but all have been important, indicating potential relationships that may provide resilience through alternatives. The second is the unfulfilled potential of the remaining allocated mineral sites. Again, as part of the baseline work the council will review these sites to understand any reasons as to why they have not yet come forward and the likelihood (or otherwise) of them doing so. This will then inform a new search for mineral sites. The council in it's role as an MPA will prioritise verifying the existing permitted reserve and the intentions of mineral operators on the Island in the immediate future in terms of how diminishing reserve's will be replaced and or supplemented.

6. Conclusions and future actions

Main Conclusions

6.1 Based on permitted reserves and allocated sites, the council has sufficient provision of land-won sand and gravel to meet the APR figure adopted by the (core strategy) plan, over its lifetime. There is a significant over provision, primarily as a result of permitted reserves. This over-provision provides the council with a significant contingency from which to deal with any likely continuing increase in demand as has been recorded in the last 3 years.

6.2 There is sufficient capacity through both the landing of marine-won and secondary and recycled aggregates to be able to provide further flexibility and resilience in supply, certainly in the short to medium term. However should the rising trend in sales of land-won sand and gravel continue, particularly if sales continue above the 10 year average as has been recorded in the last four years, then there will be greater urgency to review, identify and deliver future sources of supply.

6.3 2022 and 2023 has potentially seen some significant activity in terms of new prospective sources of indigenous land-won sand and gravel. Last year saw the submission from an existing operator for the extraction of up to 900,000 tonnes of sand and gravel[11]. While this has yet to be determined, it has the potential to make a significant contribution to supply over a ten year period and would bring permitted reserves in excess of 700,000 tonnes, providing the Island with a landbank of permitted sand and gravel reserves in excess of 7 years.

6.4 This year (2023) has seen the council receive 2 EIA screening opinion requests, which if subsequent applications were approved would result in over 500,000 tonnes of sands and gravels of varying composition. Accepting the significant assumptions, if all three operators were successful in gaining planning permission this could add a potential estimated 1.2mt to the Island's land bank. Table 18 below provides a projected indication of what effect the estimated tonnage would have on supply and permitted reserves.

Table 18: Projected indication of reserves and landbank should proposed extraction of sand and gravel at 3 sites gain planning permission over the next 2 years

	2013	2014	2015	2016	2017	2018	2019	2020	2021	2022	2023**	2024**
Sales*	62	68	90	87	70	76	135	103	117	108	92	92
Permitted reserves*	1,709	1,354	1,160	1,442	738	671	435	475	498	483	391 + 800 = 1,191	1,099 + 550 = 1,649
Land bank (Years)	21.3	12.5	11.6	14.4	7.4	8.6	5.5	4.7	5	4.8	**11.9**	**16.5**

*Figures for Sales and Permitted reserves are in Thousands of Tonnes

**2023 – 2024 are projected figures based upon existing baseline of known permitted reserves, 10yr average sales to date (2022) and information on yield potential provided by operators/applicants

[11] Reference 22/00654/FUL, Proposed extraction of sand and gravel and restoration to agriculture, Land At Palmers Farm Brocks Copse Road Wootton Ryde Isle Of Wight PO33 4NP

Summary of findings

6.3 The following points summarise the main findings of the 2022 LAA;

- Sales from all aggregate sources have decreased from the previous monitoring year, with only land-won sand & gravel sales being above the 10yr average.
- While the largest decrease by volume was in recycled aggregate (down 29,000t), proportionately imported crushed rock saw the largest decrease at 63% reduction on 2021 sales.
- Land-won and marine sand & gravel made the biggest contribution for 2022, accounting for a total tonnage of some 187,000t or 86% of total aggregate sales;
- The remaining permitted reserves are below the 7 year landbank, using the 10 year sales average gives a landbank figure just over 5 years, whilst using the local apportionment figure lowers this to less than 5 years;
- There is a significant amount of available alternative infrastructure capacity for aggregates on the Isle of Wight;
- The ongoing shift in supply of sand and gravel, from a majority of indigenously sourced land-won, to marine-won, to back to land-won over the last 10 years and beyond.

Future actions

6.4 As a result of this assessment the following actions have been identified, ideally to be carried out over the next monitoring year, in order that the outcomes may inform the next (2023) LAA;

- Review landbank estimates in light of decision on submitted application for up to 900,000t of sand and gravel;
- Monitor progression of 2 further indigenous sand & gravel applications through 2023/24;
- Liaise with the Environment Agency for an update on permits and recycling activity.