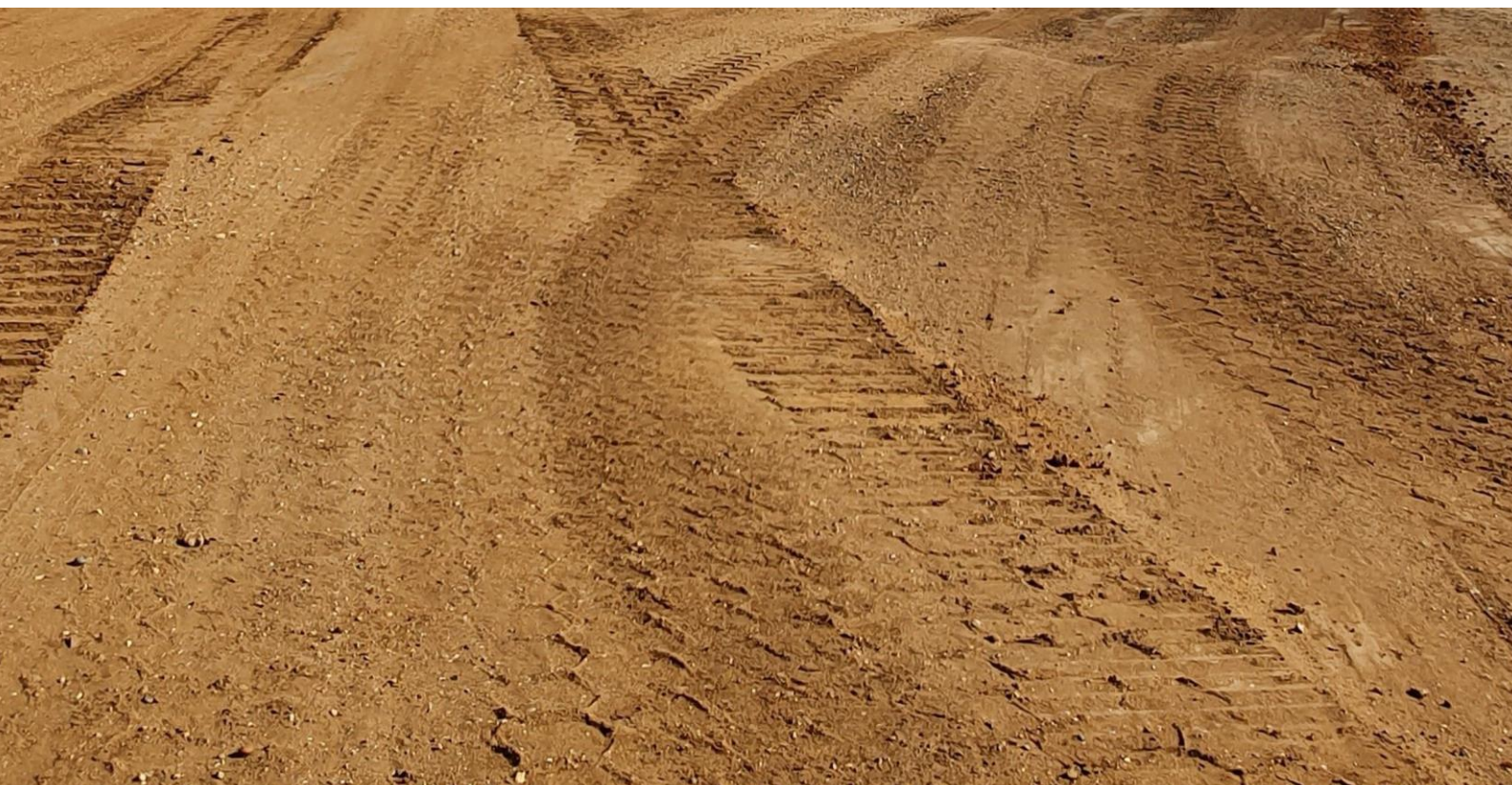


# Other Relevant Local Information to Justify Aggregate Provision in Essex 2012-2029, 2021



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## 1. INTRODUCTION

- 1.1 This paper has been prepared by Essex County Council (ECC) as Mineral Planning Authority (MPA) to evidence the scale of aggregate provision as put forward in the review to the [Essex Minerals Local Plan](#) (MLP). It should be read in conjunction with the [Greater Essex Local Aggregate Assessment](#).
- 1.2 The review of the MLP proposes to maintain the provisions set out in MLP Policy S6 (Provision for sand and gravel extraction) of 4.31 million tonnes per annum (mtpa) of land-won sand and gravel over an 18 year period from 1<sup>st</sup> January 2012 to 31<sup>st</sup> December 2029.
- 1.3 Government policy contained in the [National Planning Policy Framework](#) (NPPF) requires MPAs to plan for a steady and adequate supply of aggregates based on a rolling average of 10 years sales data and other relevant local information, an assessment of all supply options (including marine dredged, secondary and recycled sources) as well as taking account of the advice of an Aggregate Working Party and the National Aggregate Coordinating Group as appropriate.
- 1.4 This topic paper outlines why the scale of aggregate provision as outlined in MLP Policy S6 remains suitable having regard to the above provisions in the NPPF but particularly “other relevant local information”.

## 2. POLICY CONTEXT

- 2.1 MLP Policy S6 sets out the amount of mineral that has been calculated as being required to equate to the provision of a ‘steady and adequate’ supply of minerals on an annual basis, and therefore the total amount of mineral required to be provided for over the Plan period. This figure was derived through an exercise as set out in the ‘Greater Essex Local Aggregate Assessment 2013’ and the ‘Review of the planned supply of Aggregate Provision in Essex 2012-2029’ documents which were submitted as evidence to the Examination in Public of the document that became the adopted MLP. Subsequent iterations of the Local Aggregate Assessment have continued to monitor the rate of planned aggregate provision against aggregate sales on an annual basis, and these are available on the ECC website<sup>1</sup>. The MLP Review proposes to maintain a plan requirement set at 4.31 mtpa. The proposed revised Policy S6 is provided below.

### Policy S6 – Provision for sand and gravel extraction

The Mineral Planning Authority shall endeavour to ensure reserves of land won sand and gravel are available until 2029, sufficient for at least 7 seven years extraction or such other period as set out in national policy. The plan requirement is set at 4.31mtpa.

~~The working of Reserve sites will only be supported if the landbank with respect to the overall requirement of 4.31mtpa is below 7 years. Policy P1 provides for the provision of sand and gravel through the allocation of Preferred Sites for extraction.~~

Mineral extraction outside Preferred or Reserve Sites will be resisted by the Mineral Planning Authority unless the applicant can demonstrate:

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<sup>1</sup> <https://www.essex.gov.uk/planning-policy-minerals-waste/minerals-local-plan>

- a) An overriding justification and/ or overriding benefit for the proposed extraction, and,
- b) The scale of the extraction is no more than the minimum essential for the purpose of the proposal, and,
- c) The proposal is environmentally suitable, sustainable, and consistent with the relevant policies set out in the Development Plan.

- 2.2 Policy S6 also confirms compliance with the need to plan for the maintenance of a landbank of at least seven years for sand and gravel. Additionally, a plan-led approach to identifying sites for mineral extraction is established via this policy through the stated position of mineral extraction being resisted outside of those sites allocated in the MLP, unless defined criteria are met.
- 2.3 Whilst the MPA has determined that Policy S6 is in broad conformity with the NPPF, there are elements of Policy S6 that require further assessment and are addressed below.

*Whether 4.31mtpa is the appropriate amount of sand and gravel to plan for*

- 2.4 The only aggregate that is quarried and produced in Essex is sand and gravel. Paragraph 207 of the NPPF states that “*Mineral Planning Authorities should plan for a steady and adequate supply of minerals*” and then sets out a range of criteria through which such a supply can be quantified. The starting point for this quantification is stated to be an assessment of the last ten years of average sales, before supplementing this with “other relevant local information”.
- 2.5 The MLP apportionment figure of 4.31mtpa was primarily underpinned by the ‘National and Sub National Guidelines for Aggregates Provision in England 2005 – 2020’. The guidelines have now expired and although there is no replacement, references have remained in every iteration of the NPPF, including a version published for consultation in January 2021 (closes 26 March 2021). There is clearly inference that Government considers that these still have an important role to play in mineral planning. These guidelines were based on a Government forecast of the amount of mineral that would be required to support growth on a national scale, which was then divided into an apportionment figure to be allocated to each region. Regional Assemblies (that were later dissolved) subsequently had the role, in conjunction with MPAs, of dividing these regional apportionment figures into an annual apportionment for each mineral planning area. The apportionment for Essex that was set out in the Guidelines was calculated in 2009.
- 2.6 Sand and gravel annual sales and permitted reserve<sup>2</sup> data is collected from operators by the MPAs, as part of the Mineral Survey. This allows MPAs to calculate if there is sufficient permitted reserve within the reporting area to sustain a seven-year landbank. For reasons of commercial confidentiality, all sites in Essex, Thurrock and Southend-on-Sea are combined into the reporting area of ‘Greater Essex’.
- 2.7 The Greater Essex apportionment is 4.45mtpa, with a proxy of 0.14mtpa being used to equate to both the apportionment and sales in Thurrock whenever such a split is required to be articulated. Sales of sand and gravel in Southend-on-Sea are taken as 0mtpa given the absence of mineral workings. Reported mineral sales in Essex are therefore an ‘assumed figure’, calculated by taking the Thurrock apportionment of 0.14mtpa away from Greater Essex sales. This leaves the Essex apportionment standing at 4.31mtpa, as set out in MLP Policy S6. Whilst the NPPF states that the ten-year rolling sales average is

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<sup>2</sup> ‘Permitted reserve’ means the amount of mineral that is permitted for extraction at a particular location but has yet to be extracted

intended to be the basis for future mineral provision, it also states in Para 207 d) that MPAs should take “*account of any published National and Sub National Guidelines on future provision which should be used as a guideline when planning for the future demand for and supply of aggregates*”.

- 2.8 The PPG further states that the Guidelines are to be used as an indication of supply rather than a rigid basis (Reference ID: 27-068-20140306). The ten-year rolling sales figure available for Essex at the point of the MLP examination hearings in 2013 was 3.62mtpa. It was therefore a point of contention as to whether the MLP was overproviding for mineral by adopting the sub-national guidelines figure of 4.31mtpa, and that instead allocations should be made on the basis of an annual provision of 3.62mtpa for Essex as calculated through ten-year rolling sales. This would result in a reduction in mineral provision of 19% compared to the use of the apportionment figure.
- 2.9 The Essex MPA justified the use of the Guidelines-derived figure (paragraph 2.5) by making references to a number of sources:
- the Oxford Econometrics East of England Forecasting Model (EEFM),
  - increasing Government household projections,
  - increasing Essex district housing completion forecasts, and
  - the major infrastructure projects to be located in the area.
- 2.10 The Inspector accepted this argument to a degree, finding the proposed apportionment sound on the proviso that the proposed schedule of Preferred Sites was modified<sup>3</sup>.
- 2.11 During the examination hearings in 2013 it was noted that 80% of aggregates produced in the County are consumed within the County<sup>4</sup>, and the Inspector noted that any economic recovery is likely to be related to increased activity in house building to which the mineral industry, and therefore the MLP, would need to respond.
- 2.12 Table 2.1 shows sales data for land won sand and gravel in Essex for a ten year period 2010 to 2019 and a sales average for a ten and three year period.<sup>5</sup>

**Table 2.1: Greater Essex sand and gravel ten year sales figures, 2010-2019**

<b>Year</b>	<b>Sales</b>		
<b>2010</b>	2.99 mt	<b>10 year sales average</b>	3.26 mt
<b>2011</b>	2.80 mt	<b>3 year sales average, 2017-19</b>	3.38 mt
<b>2012</b>	2.30 mt		
<b>2013</b>	3.18 mt		
<b>2014</b>	4.37 mt		
<b>2015</b>	3.45 mt		
<b>2016</b>	3.40 mt		
<b>2017</b>	3.41 mt		
<b>2018</b>	3.56 mt		
<b>2019</b>	3.17 mt		

- 2.13 This paper now reviews the four sources outlined in paragraph 2.10 and demonstrates why it is considered appropriate to maintain the scale of aggregate provision at 4.31mtpa in the MLP. It is recognised that this justification reflects that presented by ECC at the MLP examination in 2013; that a mineral apportionment higher than the ten-year rolling sales

<sup>3</sup> Paragraph 46 of the [Report on the Examination of the Essex County Council Replacement Minerals Local Plan](#)

<sup>4</sup> Greater Essex Local Aggregate Assessment 2013

<sup>5</sup> [Greater Essex LAA](#) 2020

was appropriate as 'other relevant local information', another consideration set out by the NPPF (Paragraph 207, Clause a), suggested an upturn in development and therefore mineral demand. The MPA maintains this is still the case.

### 3. NATIONAL AND REGIONAL ECONOMIC GROWTH

- 3.1 The Government is committed to restoring economic growth in order to create jobs and prosperity as supported by the [Growth and Infrastructure Act 2013](#) and the [National Infrastructure Strategy \(2020\)](#). Economic recovery will be a Government priority as the country deals with the aftermath of the COVID19 pandemic and Brexit where the [Prime Minister's Ten Point Plan for a Green Industrial Revolution for 250,000 jobs](#) will be further developed. ECC is also committed to supporting economic growth through the [Greater Essex Growth and Infrastructure Framework](#) and [Economic Plan for Essex](#); both of which seek to plan and secure the highways and infrastructure required to facilitate business growth, and support the demand and requirements for additional house-building in the county. Meeting these objectives will in some form require the use of aggregates.
- 3.2 The NPPF states that is essential that there is a sufficient supply of minerals to provide the infrastructure, buildings, energy and goods that the country needs.<sup>6</sup> Aggregate minerals make an essential contribution to the nations' prosperity and to the quality of life. Aggregates underpin the construction sector and provide the critical raw material for built development, other construction, manufacturing and the maintenance of infrastructure. Sand and gravel can be put to many uses, although consumption is fundamentally driven by activity in the construction sector and is primarily linked to house building.
- 3.3 The [Greater Essex Local Aggregate Assessment: 2020](#) (LAA) notes that over 75 per cent of the sand and gravel consumed within Greater Essex originated in Essex. It can therefore be reasonably expected that future demand for sand and gravel will be related to future prospects for the Essex economy and house-building rates.
- 3.4 The LAA also noted that the level of demand for mineral resources will be predicated on the amount and type of development in and close to Essex.<sup>7</sup> The Mineral Products Association published an overview of construction and mineral products markets in the East of England. This included reference to the construction outlook between 2019 and 2023. Total construction is forecast to increase by an average of 1.2% per annum (pa) over 2019 to 2023 compared to overall expected growth of 1.3% pa on average for the UK. Growth is expected to be driven by private housing, (the largest subsector in the region) with some additional support from public sector construction in the housing and non-housing subsectors. The extension in [Beaulieu Park, Chelmsford](#) and redevelopment of [Purfleet, Thurrock](#), (both valued at £1 billion respectively) are noted as significant projects within the East of England region.
- 3.5 To further assess the future economic and house-building prospects of Essex, the following sources have been reviewed and will be compared to mineral sales and the MLP apportionment figure:
- [East of England Economic Forecasting Model](#) (EEFM);
  - Standard Method for calculating housing need;

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<sup>6</sup> Paragraph 203, NPPF (2019)

<sup>7</sup> LAA, paragraphs 1.3.1 to 1.3.3

- Housing completions; and
- Major infrastructure and development projects to be located in the area.

### *East of England Economic Forecasting Model*

- 3.6 Data has been sourced from the EEFM 2019.<sup>8</sup> The EEFM was developed to project economic, demographic and housing trends in a consistent fashion and in a way that would help inform spatial economic planning in the East of England. The EEFM provides a set of baseline forecasts prepared by a leading independent forecasting house (Cambridge Econometrics) for the East of England region and sub-regions (counties, unitaries and district authorities), the East Midlands and South East regions, and the Greater Cambridge Greater Peterborough, Hertfordshire, New Anglia, South East and South East Midlands LEP areas.<sup>9</sup>
- 3.7 The EEFM covers a wide range of variables and is designed to be flexible so that alternative scenarios can be run. The model has also been used for a variety of spatial planning and economic development purposes across the region and is often used to inform the preparation of Local Plans by local planning authorities in Essex. EEFM 2019 was developed before the Covid-19 pandemic. The forecasts do not include any Covid-19 specific assumptions or impacts. A detailed explanation of the model is outlined in a [technical report](#) describing the model and data sources.
- 3.8 For each data source from the EEFM, Essex County is compared to Greater Essex (comprising Essex County, Southend-on-Sea and Thurrock), the East of England region and the UK. Relevant data from the EEFM includes:
- Gross Value Added (GVA) of all industries of the economy;
  - GVA of the construction sector;
  - GVA of the mining and quarrying sector; and
  - Demand for dwellings.

#### *Gross Value Added (GVA) of all industries of the economy*

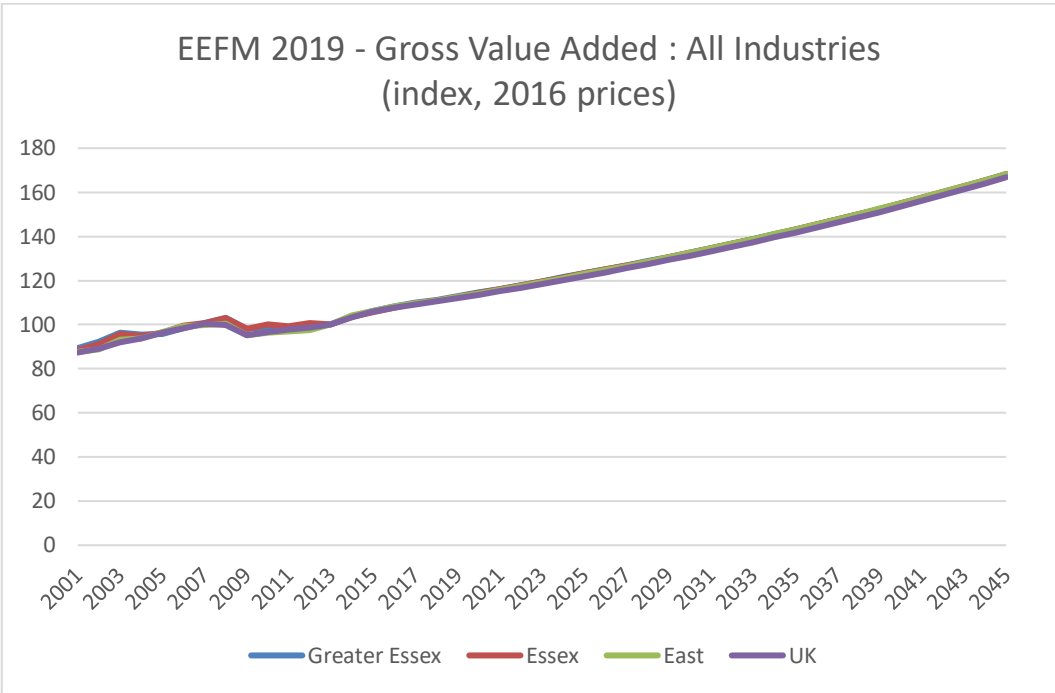
- 3.9 GVA measures the contribution to the economy of each individual producer, industry or sector in the UK and is a headline measure used to monitor economic performance. It provides a pound sterling (£) value for the amount of goods and services that have been produced, less the cost of all inputs and raw materials that are directly attributable to that production.
- 3.10 GVA of all industries of the economy provides an indication of total economic activity and is forecast to increase over the MLP period. Figure 3.1 shows higher growth in Essex and Greater Essex when compared to the UK. When comparing a ten year average for 2010 to 2019, to the forecast average for 2020 to 2029, there is an uplift of 18 per cent in the GVA of Greater Essex.

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<sup>8</sup> The East of England region comprises the same counties, unitary and district authorities included within the East of England Aggregate Working Party.

<sup>9</sup> Data can be accessed from <https://cambridgeshireinsight.org.uk/eefm/> - NB. EEFM was previously carried out by Oxford Econometrics

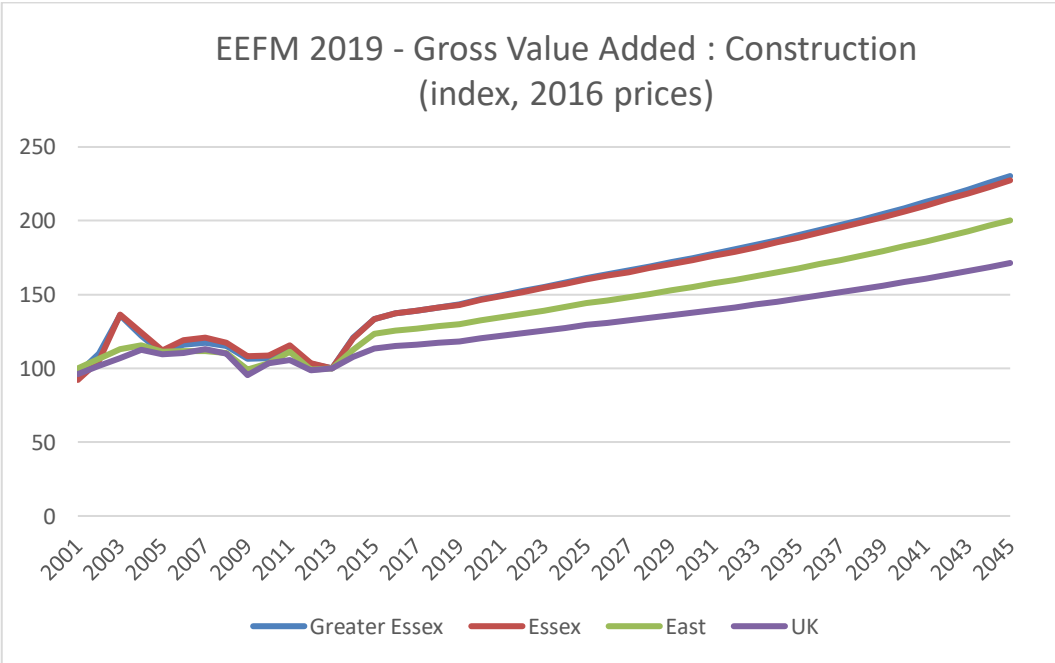
**Figure 3.1: GVA all industries (£m, 2016 prices)**



*GVA of the construction sector*

3.11 GVA of the construction sector shows its contribution to the GVA for all sectors. Figure 3.2 shows higher historical and forecast growth for Essex County and Greater Essex when compared to the UK. When comparing a ten year average for 2010 to 2019, to the forecast average for 2020 to 2029, there is an uplift of 32 per cent in the GVA of Greater Essex.

**Figure 3.2: GVA construction (£m. 2016 prices)**

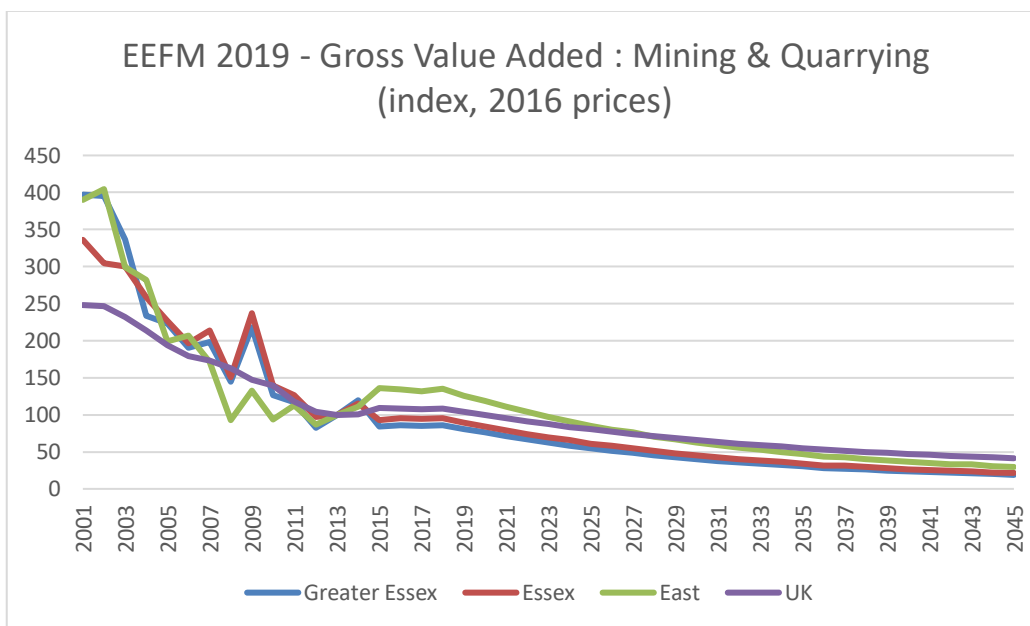




### GVA of the mining and quarrying sector

3.12 Activity in the aggregates industry falls within the mining and quarrying sector. GVA for this sector has been in decline across the UK since 2001 as shown in Figure 3.3. However, the sector is dominated by oil and gas rather than activities related to aggregates. In 2018, total UK extractive industry GVA is now estimated to have been £18 billion, with oil and gas production and associated support service activities accounting for 90% of the sector's GVA. Consequently, as the sector is dominated by the performance of oil and gas, its use is of limited value in providing a clear or accurate picture of the aggregates industry. Construction minerals, principally crushed rock and sand and gravel aggregates represent the largest materials flow in the UK. The market for these minerals depends upon the level of UK construction activity and longer-term construction-related demand, and is therefore more related to Figure 3.2.<sup>10</sup>

**Figure 3.3: GVA mining and quarrying (£m. 2016 prices)**

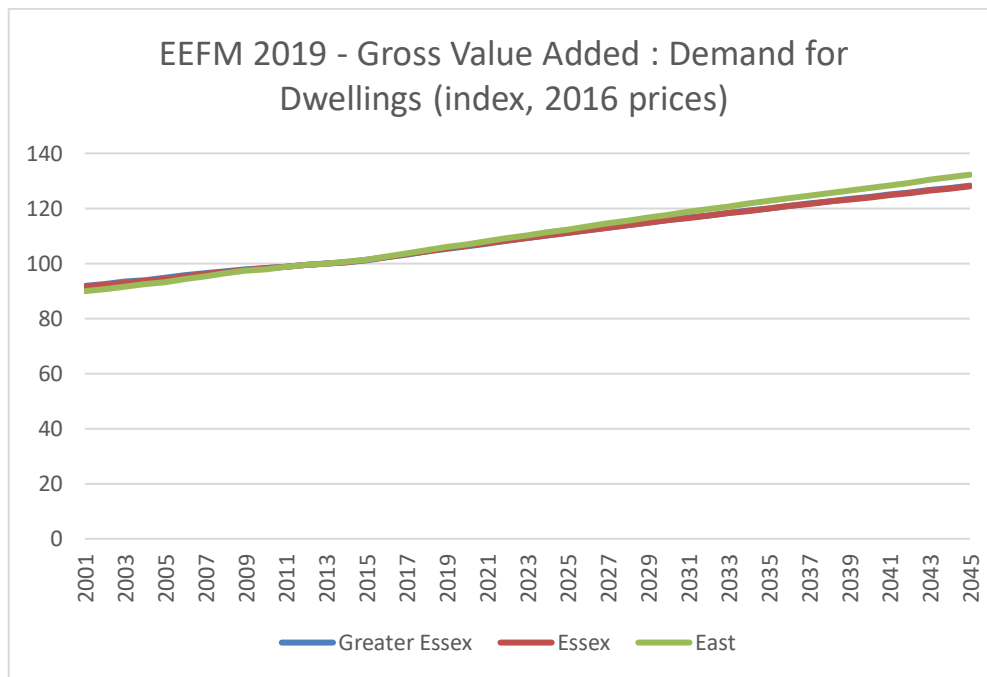


### Demand for dwellings

3.13 Within the EEFM the forecast demand for dwellings is directly related to the economic outputs of the model through a series of ratios that convert the forecast working age population to the demand for dwellings. It is intended to proxy dwelling stock, but it is not a conventional stock or supply figure. Rather it tries to estimate what stock might be needed to maintain current occupation ratios (the ratio of occupied to total dwellings) in the context of a higher population. Figure 3.4 shows that for Greater Essex the dwelling stock is forecast to grow by 11 per cent between 2020 and 2029. This represents an increased rate of growth in the dwelling stock from 8,340 between 2010 and 2019 to 9,270 between 2020 and 2029.

<sup>10</sup> <https://www.gov.uk/government/publications/extractive-industries-transparency-initiative-payments-report-2018/extractive-industries-in-the-uk>

**Figure 3.4: Demand for dwellings**



*Standard Method for calculating housing need*

- 3.14 The NPPF expects strategic policy-making authorities to follow the standard method as outlined in [Planning Practice Guidance](#) for assessing local housing need. The standard method uses a formula to identify the minimum number of homes expected to be planned for, in a way which addresses projected household growth and historic under-supply. The standard method identifies a minimum annual housing need figure for each local planning authority (LPA). While, it does not produce a housing requirement figure, there is an expectation (subject to consideration and evidence of constraints) for the LPA to meet this need as and when they prepare their new Local Plans with a review completed no later than five years from the adoption date of a plan.<sup>11</sup>
- 3.15 For Greater Essex, the standard method indicates an annual provision of 10,683 dwellings between 2020 and 2029, compared with recorded dwelling completions of 5,605 between 2010 and 2019. This represents an expected increased rate of dwelling provision of 90 per cent.
- 3.16 Table 3.1 compares the standard method to housing requirements contained in adopted or emerging local plans, which represents an increase of 11 per cent. It can be expected that ten local plans will commence a review in the next five years and will need to use the standard method when setting their housing requirement.

**Table 3.1 Housing requirements from standard method compared to Local Plan**

LPA	Standard Method	Housing requirements in adopted and submitted Local Plans**
Basildon	1,001	(S) 890
Braintree	857	(A) 716

<sup>11</sup> Paragraph 33, NPPF (2019)

Brentwood	453	(S) 456
Castle Point	354	(S) 352
Chelmsford	946	(A) 950
Colchester	1,078	(A) 920
Epping Forest	953	(S) 518
Harlow	473	(A) 460
Maldon	308	(A) 310
Rochford*	360	360
Tendring	866	(A) 550
Uttlesford*	706	747
<b>Essex</b>	<b>8,355</b>	<b>7,229</b>
Southend*	1,181	1,181
Thurrock*	1,147	1,147
<b>Greater Essex</b>	<b>10,683</b>	<b>9,557</b>

Notes

\* Plans at an early stage of preparation and will be based on the standard method

\*\* For indicative purposes an annual rate has been provided by dividing the adopted / submitted Local Plan requirement by the plan period (A = Adopted) (S = Submitted)

### Housing completions

3.17 Table 3.2 shows housing completions over a ten-year period 2010 to 2019 compared to the annual number of completions assessed as equating to the local housing need under the Standard Methodology for the period 2020 to 2029. Completions in Greater Essex have increased by 43 percent since the MLP was adopted in 2014 and also show a year on year increase between 2012 and 2018. In Essex, completions have increased year on year from 2012, and have increased by 42 percent since the MLP was adopted. Current rates of delivery can be seen to be below the figures derived from the Standard Methodology. Planning applications continue to be lodged and approved by LPAs despite the current COVID-19 pandemic which suggest housing completions will continue to increase for the remainder of the MLP plan period.

**Table 3.2: Greater Essex (GE) and Essex (E) housing completions 2010-2019, and Standard Methodology Annual Requirement 2020-2029**

Year	Greater Essex Completions	Essex Completions		GE	E
2010	3,576	3,105	10 year average	5,605	4,799
2011	4,755	4,084	3 year average, 2017-19	7,759	6,674
2012	3,731	3,166	5 year average, 2015-19	7,060	6,021
2013	3,447	2,920	5 year average, 2010-14	4,150	3,577
2014	5,243	4,612	Standard Method 2020-29	10,683	9,557
2015	5,823	4,967			
2016	6,201	5,118			
2017	7,496	6,120			
2018	8,231	7,330			
2019	7,549	6,571			

## Major infrastructure and development projects

3.18 In addition to the above overall planned and expected level of housing growth, there are also major infrastructure and development projects that are either planned, programmed or underway in Greater Essex and/or in adjoining authorities as set out in Table 3.2 (not exhaustive). These constitute large one-off developments, urban extensions or new transport projects that would directly impact on the reserves and availability of aggregate and non-aggregate reserves/sites, as specified in the Essex MLP, generating significant additional demand throughout and beyond the plan period.

**Table 3.2: Summary of major Infrastructure and development projects**

Infrastructure Scheme	Lead	Status	Delivery Date
M11 Junction 7a	ECC	On-site	2022
M25, Junction 28	Highways England	NSIP <sup>12</sup>	2024
Chelmsford North East Bypass	ECC	Planning Application 2021, onsite 2022	2024
A120/A133 Link Road and Rapid Transit System	ECC	Planning Application 2021, on-site 2022	2024
Beaulieu Park Station	ECC/ Network Rail	Planning Application 2021 and on-site 2022	2025
A12 Widening (Junctions 19 – 25)	Highways England	NSIP	2027/28
Lower Thames Crossing	Highways England	NSIP	2027/28
A120 – Braintree to A12	ECC/ Highways England	Funding to be confirmed but favoured route confirmed	2028 or beyond
Fairglen Interchange, South Essex	ECC	On-site	2023
Bradwell B Nuclear Power Station	China Generation Nuclear Power Corporation (CGN) and EDF Energy	NSIP	2030 but would require significant enabling infrastructure e.g. highway and other transport upgrades, before commencement
A13 Widening (A128 to A1014)	Thurrock Highways	On-site	2021
London Gateway Port	DP World	On-site	2023 and beyond
Tilbury 2 (Tilbury Port Expansion)	Port of Tilbury	NSIP	2021/22
Tendring Colchester Borders Garden Community	Private developer working with Colchester Borough Council, Tendring District Council and ECC	Adopted Local Plan allocation. New Garden Community for 7,000 to 9,000 new homes, business, retail, schools etc.	Commence 2024 and phased delivery over a 25 year period
Harlow Gilston Garden Town	Private developers	Adopted Local Plan allocations. On-site and 16,000 new homes, mixed uses and related infrastructure	Commenced and phased delivery to 2033

<sup>12</sup> Nationally Significant Infrastructure Project

<b>Infrastructure Scheme</b>	<b>Lead</b>	<b>Status</b>	<b>Delivery Date</b>
Chelmsford Garden Village	Chelmsford City Council with a Developer Consortium	Adopted Local Plan allocation. Extension to Beulieu Park and Channels with a total of 10,000 new homes, business, retail, schools etc.	Commenced and phased completion to 2044
South Woodham Ferrers	Private developer	Adopted Local Plan allocation. 1,000 to 1,200 new homes	Commence 2021/22 onwards
Great Leighs	Private developer	Adopted Local Plan allocation. 1,200 new homes	Commence 2022/23 onwards
North Heybridge Garden Suburb	Private developer	Adopted Local Plan allocation. 1380 homes	Commenced 2018/19 and phased delivery
South Maldon Garden Suburb	Private developer	Adopted Local Plan allocation. 1430 homes	Commenced 2018/19 and phased delivery
East of Great Notley	Private developer	Adopted Local Plan allocation. 1,950 homes	Commenced and phased delivery to 2033+
Land south of Feering / West of the A12	Private developer	Adopted Local Plan allocation. 795 homes	Commence 2024/25 and phased delivery
Basildon Town Centre	Basildon Council and private developers	Various applications approved or being submitted – up to 7,500 new units planned	Commenced and phased completion to 2033+
Purfleet	Purfleet Centre Regeneration Limited, in partnership with Thurrock Council	New town centre, 2,850 new homes, transport infrastructure, schools and over 1,000,000 square feet of film and TV production studios.	Commenced and phased completion to 2025+

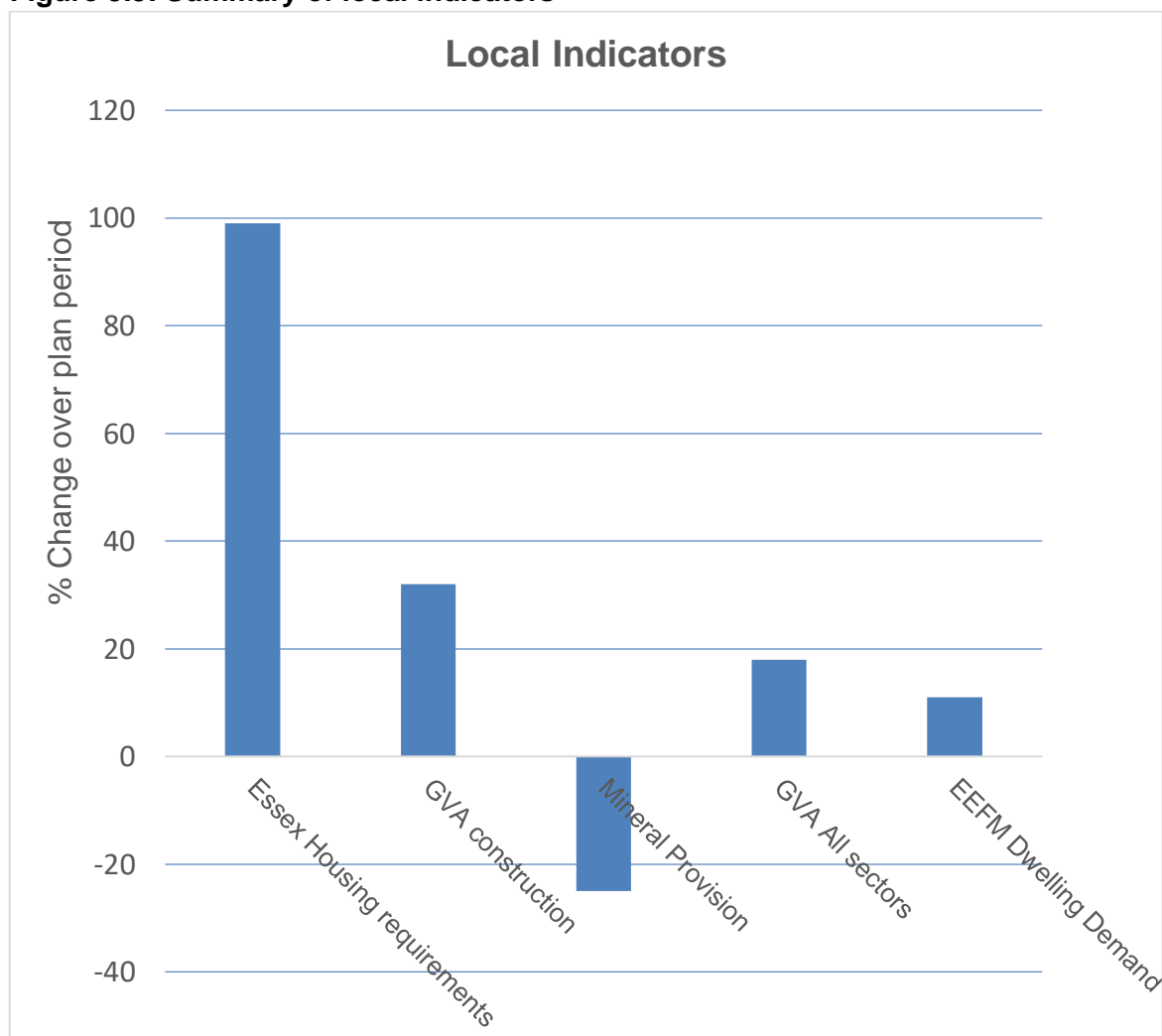
## 4. FINDINGS AND CONCLUSIONS

- 4.1 The NPPF allows MPAs to determine their own aggregate supply and advises that aggregate provision should be based on a rolling average of 10 years sales data and other relevant local information, an assessment of all supply options (including marine dredged, secondary and recycled sources) as well as taking account of the advice of an AWP and the National Aggregate Coordinating Group as appropriate.
- 4.2 A review of sand and gravel sales, other relevant local information in the form of economic and industry trends, together with housing completions and future projected dwelling requirements, suggests that a higher level of future sand and gravel provision would be more appropriate for the MLP than that indicated by the average sales data for either ten years or three years. This position would maintain the figure in the adopted MLP which at the time of production was supported by the East of England AWP. At this time, the AWP continues to note the importance of following national requirements in relation to calculating plan provision, in particular the consideration of using forecasts and other local information to test the appropriateness of basing plan provision on an average of the last ten years sales.

4.3 The data presented in Section 3 of this topic paper shows the following.

- Over 75 per cent of sand and gravel consumed in Greater Essex originated in Essex.
- Average ten year sales data for sand and gravel between the years 2010-2019 is below the annual provision in the MLP.
- Reducing the MLP requirement of 4.31mtpa to align with a 10 year average sales figure of 3.26mtpa would reduce provision by 25 per cent.
- Sales were above the 10 year sales average for the five years 2014 to 2018. This period coincided with a significant increase in annual housing completions; an average of 5,629 compared to the preceding five years of 3,295.
- Sand and gravel use is closely related to economic prospects, activity in the construction sector and is primarily linked to house-building rates.
- GVA construction figures are forecast to increase over the remaining plan period.
- One indicator shows significant growth in expected Local Plan housing requirements when compared to recent housing completions.
- There are significant major infrastructure and development projects either planned, programmed or underway in Greater Essex that would directly generate significant additional demand for minerals throughout and beyond the MLP plan period.
- All indicators are forecast to increase over the plan period.

**Figure 3.5: Summary of local indicators**



**Table 3.2: Summary of local indicators**

<b>Local indicator</b>	<b>Data for base decade<sup>13</sup></b>	<b>Data for future<sup>14</sup></b>	<b>% change</b>
<b>GVA total</b> (£m, EEFM)	35,963	42,602	18
<b>GVA construction</b> (£m, EEFM)	3,625	4,779	32
<b>Demand for dwellings</b> (EEFM)	8,340	9,270	11
<b>Essex Housing requirements</b> Completions vs Standard Method	4,799	9,557	99

- 4.4 This review suggests that the scale of future sand and gravel provision set out in the MLP Review remains reasonable in terms of current views of prospects for future economic and house-building conditions in Essex. Such an approach would afford flexibility of supply in accordance with national policy. Of note is the increase in housing requirements arising from the use of the Government's standard method for new Local Plans. Historic sales data in the circumstances are considered an inappropriate indicator of long term trends for sand and gravel use in Essex, and would result in a reduction of 25 per cent from current provision.
- 4.5 It is therefore prudent to secure future supply by maintaining a long term MLP target above historic three and ten year sales data. Sand and gravel provision as outlined in the adopted MLP will support demand within Greater Essex and the sub-region and on the balance of evidence, sand and gravel provision contained in the MLP remains reasonable. Given continued current weakness of the economy and uncertainty over the timing and scale of economic recovery, the proposed provision would contribute sufficient reserves for the MPA to react flexibly to an expected upturn in demand for sand and gravel during the plan period to support national and regional economic growth objectives.

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<sup>13</sup> Base decade is 2010 to 2019 to reflect decade used for the 10-year sales average of sand and gravel

<sup>14</sup> Future base date is the remaining MLP 10 year plan period 2020-2029

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**Essex County Council  
Minerals and Waste Planning**

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