



**SOUTH WALES REGIONAL
AGGREGATES WORKING
PARTY**

**ANNUAL REPORT FOR 2024
Published January 2026**

The statistics and statements contained in this report are based on information from a large number of sources and are compiled to an appropriate level of accuracy and verification.

Readers should use corroborative data before making major decisions based on this information.

The SWRAWP wishes to acknowledge the financial support of the Welsh Government which has enabled this report to be coordinated and published. The SWRAWP also wishes to record its thanks to all those in the mineral industry and the Mineral Planning Authorities in South Wales who have contributed to the production of this report.

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1. INTRODUCTION

1.1 This report has been prepared by the South Wales Regional Aggregate Working Party (SWRAWP) and **covers the calendar year 2024**. Each year, the SWRAWP co-ordinates the aggregate sales information received from all mineral operators via the eighteen local planning authorities which make up the South Wales region. Where annual survey returns have not been made, estimated data has been used. The work of the SWRAWP has been funded by Welsh Government (WG) since April 2002. The current grant funding runs until March 2025.

1.2 The collated information in this report makes a significant contribution to the ongoing study of supply and demand patterns and provides a vital input into the monitoring and review of Welsh Government's policy for aggregates enshrined in Planning Policy Wales and amplified in Minerals Technical Advice Note 1: Aggregates (MTAN1). It also assists in the monitoring of progress towards the achievement of the recommendations set out in the *Regional Technical Statement – Second Review (RTS2) – September 2020*. This information is also necessary to Local Planning Authorities in carrying out their statutory functions in respect of the preparation of local development plans and the determination of planning applications. The information is also made available to the general public and industry, the latter using it to assist in planning new investment.

1.3 The Mineral Products Association Wales (MPAW) has issued advice to its members in relation to the confidentiality of data on aggregates supply which is supplied to Local Planning Authorities in response to the annual aggregate working party survey. All data is provided on a 'Commercial in Confidence' basis and can be used by Local Planning Authorities for purposes associated with their planning functions so long as it prevents data being ascribed to individual planning units, unless specific permission to use the data is given by the operator. The British Aggregates Association has always encouraged members to fully disclose relevant information.

2. SOUTH WALES REGIONAL AGGREGATES WORKING PARTY

2.1 The SWRAWP is one of eleven Aggregates Working Parties (AWPs) in England and Wales which provide information and advice to the Department for Levelling Up, Housing and Communities (DLUHC) and to the Welsh Government in relation to the supply of, and the demand for, aggregate minerals.

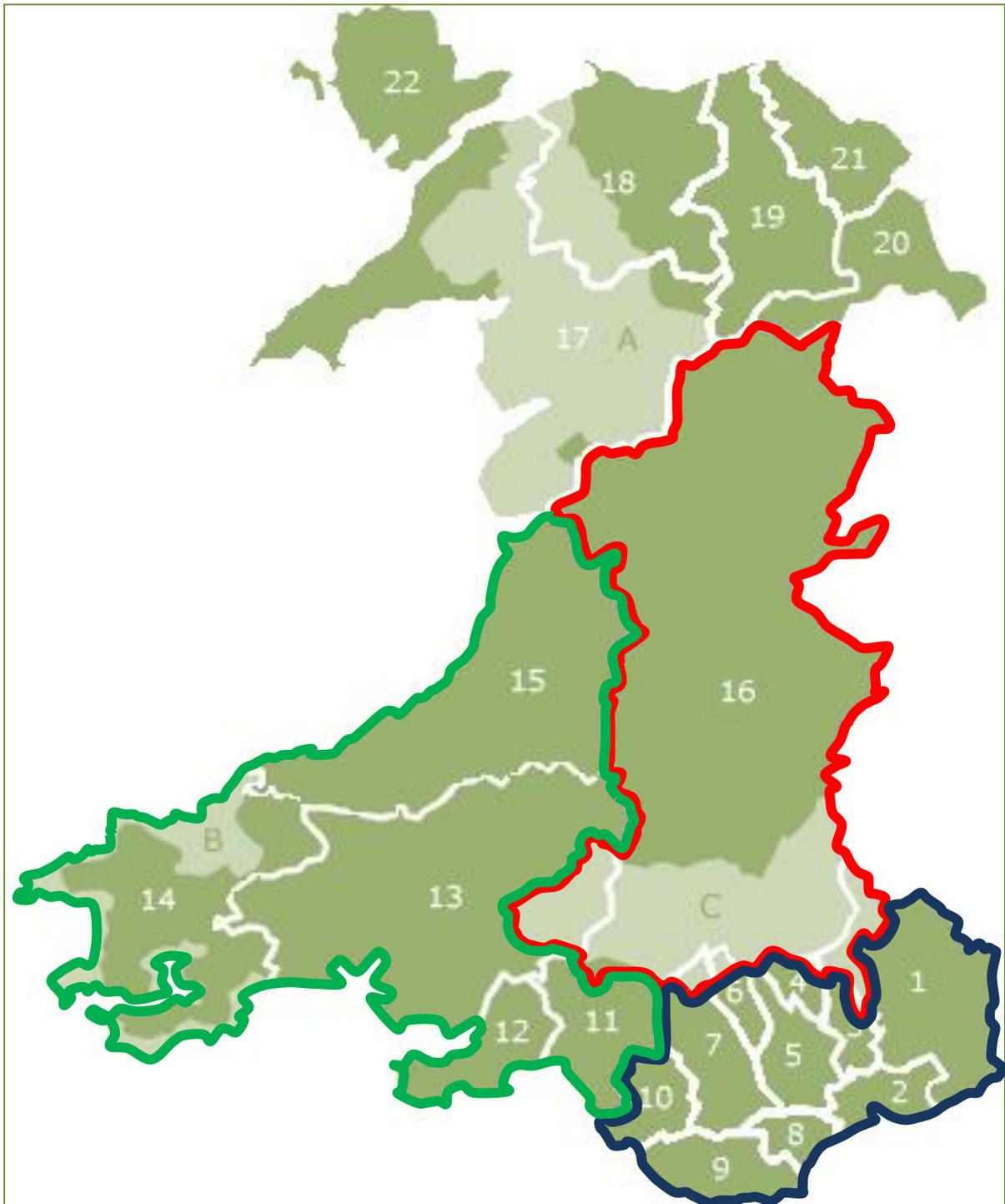
2.2 The SWRAWP is a technical working group with membership drawn from officers of the 18 Local Planning Authorities, representatives of the Mineral Products Association Wales (MPAW), the British Aggregates Association (BAA), representatives of the construction and demolition industry, Welsh Government, The Crown Estate and Natural Resources Wales. It is not a policy making body. A list of members at the date of publication of this report is provided in Appendix A.

2.3 Two ordinary meetings of the SWRAWP were held in 2023, one in March and the other in October.

2.4 Meetings were held with Welsh Government officials to discuss RAWP contract work. Regular contact has been maintained with Local Planning Authority Officers to ensure robust and consistent data is used for the annual survey.

MAP 1

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

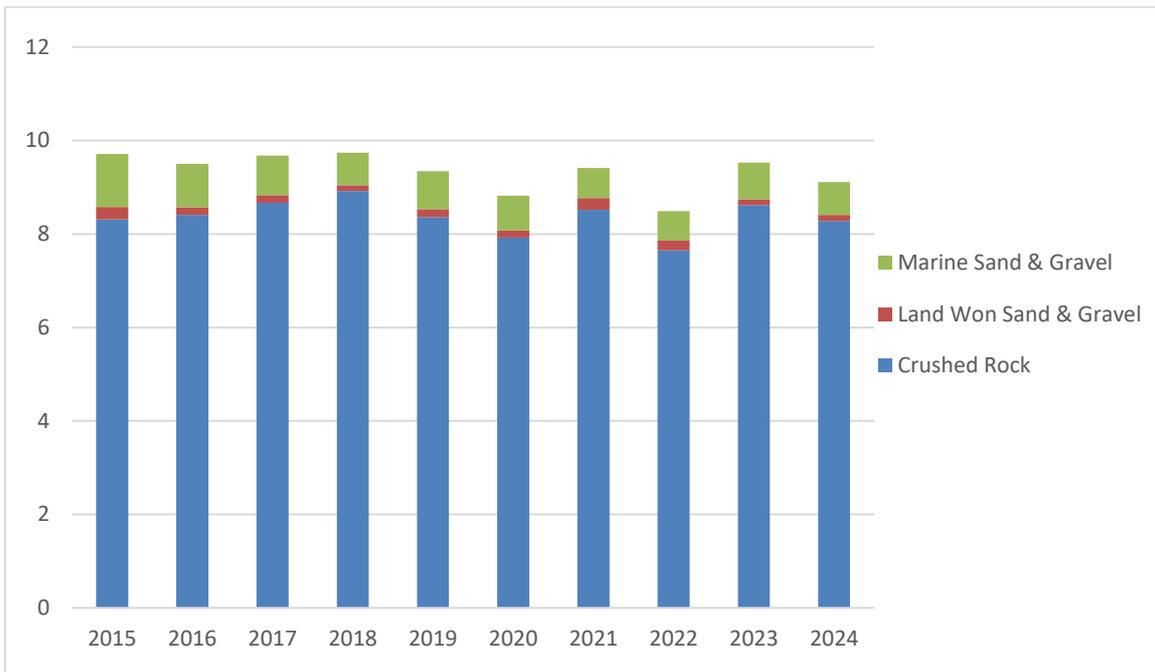


South East Wales	South West Wales
1. Monmouthshire	11. Neath-Port Talbot
2. Newport	12. Swansea
3. Torfaen	13. Carmarthenshire
4. Blaenau Gwent	14. Pembrokeshire
5. Caerphilly	15. Ceredigion
6. Merthyr Tydfil	B. Pembrokeshire Coast National Park
7. Rhondda Cynon Taf	
8. Cardiff	Powys/BBNPA
9. Vale of Glamorgan	16. Powys
10. Bridgend	C. Brecon Beacons National Park

Table 1
Primary Aggregate Sales 2014-2023 (million tonnes)

	Crushed Rock					Land Won Sand & Gravel					Marine Dredged Sand & Gravel					All Primary Aggregates	
Year	Powys (inc Brecon Beacons)	South West Wales	South East Wales	Total Sales	% of Total Sales	Powys (inc Brecon Beacons)	South West Wales	South East Wales	Total Sales	% of Total Sales	Powys (inc Brecon Beacons)	South West Wales	South East Wales	Total Sales	% of Total Sales	Sales	% change from previous year
2015	3.28	1.81	3.22	8.31	85.58	0	0.27	0	0.27	2.78	0	0.26	0.87	1.13	11.64	9.71	+6.5%
2016	3.07	1.69	3.65	8.41	88.52	0	0.16	0	0.16	1.68	0	0.25	0.68	0.93	9.80	9.50	-2.2%
2017	3.04	1.8	3.83	8.67	89.57	0	0.16	0	0.16	1.65	0	0.19	0.66	0.85	8.78	9.68	+1.9%
2018	2.91	1.99	4.02	8.92	91.58	0	0.12	0	0.12	1.23	0	0.21	0.49	0.70	7.19	9.74	+0.6%
2019	3.04	1.72	3.60	8.36	89.51	0	0.17	0	0.17	1.82	0	0.24	0.57	0.81	8.67	9.34	-4.1%
2020	3.07	1.58	3.27	7.92	89.80	0	0.16	0	0.16	1.81	0	0.24	0.50	0.74	8.39	8.82	-5.6%
2021	3.20	1.74	3.58	8.52	90.54	0	0.25	0	0.25	2.66	0	0.20	0.44	0.64	6.80	9.41	+6.7%
2022	2.68	1.59	3.38	7.65	90.11	0	0.22	0	0.22	2.59	0	0.19	0.43	0.62	7.30	8.49	-9.8%
2023	2.67	1.76	4.18	8.61	90.73	0	0.13	0	0.13	1.37	0	0.23	0.52	0.75	7.9	9.49	+11.78
2024	2.67	1.52	4.09	8.28	90.89	0	0.13	0	0.13	1.43	0	0.25	0.45	0.7	7.69	9.11	-4
% Change from 2023	0	-13.6	-2.12	-3.8	0.17	0	0	0	0	4.4	0	8.7	-13.5	-6.7	-2.7		-4

FIGURE 1 – Primary Aggregate Sales 2015-2024(million tonnes)



3.1 Table 1 shows the total primary aggregate sales from the region over the 10-year period 2015-2024, subdivided between South West Wales, South East Wales and Powys/BBNPA. These sub-regions correspond to the areas for which data has been available over the last 10 years allowing data to be compared and at the same time respecting confidentiality.

3.2 South West Wales is made up of the following Mineral Planning Authorities – Carmarthenshire, Ceredigion, Pembrokeshire, Pembrokeshire Coast National Park, Neath Port Talbot and Swansea.

3.3 South East Wales is made up of Blaenau Gwent, Merthyr Tydfil, Monmouthshire, Newport, Torfaen, Bridgend, Caerphilly, Cardiff, Rhondda Cynon Taf and the Vale of Glamorgan.

3.4 The total sales of primary aggregate decreased by 4% in 2024 to 9.11 million tonnes compared to 9.49 million tonnes in 2023.

3.5 Crushed rock sales decreased to 8.28 million tonnes in 2024 (- 3.8%) compared to 8.61 million tonnes in 2023. Sales for the Powys/BBNPA area remained the same for 2024 as for 2023 at 2.67million tonnes the remaining areas all experienced a decrease in sales compared to 2023.

3.6 Marine sand and gravel sales decreased to 700,000 tonnes in 2024 (-6.7%) compared to 750,000 tonnes in 2023, there was a slight increase (approx. 20,000 tonnes) in output from the South West Wales region, with a more marked decrease (approx. 70,000 tonnes) for the South East Wales region.

3.7 Land-won sand and gravel sales in 2024 remained the same (circa 130,000 tonnes) as the output for 2023. Land won sand and gravel sales come exclusively from sites in South West Wales. It is noted from the returns that, for the second year in a row, one of the major producers of terrestrial sand and gravel kept a significant proportion of its aggregates sales as non-aggregate products, which goes some way to explaining the similar drop in overall aggregate sales, compared to previous years (eg 2022). This is an anomalous result and does not occur every year, although as noted above, this is the second year in a row. If the non-aggregates had instead been sold as aggregates, then the decrease would have been less significant (approx. 42,000 tonnes less compared to 2022 – when the non-aggregate product was not as significant).

3.8 Crushed rock accounts for 90.89% of primary aggregate sales (90.37% in 2023) with marine landings contributing 7.69% (7.95% in 2023) and land won sand and gravel approximately 1.43% (1.37% in 2023)

3.9 South East Wales has the highest proportion of crushed rock sales at 4.08 million tonnes (49.3%), with Powys (including Brecon Beacons) at 2.67 million tonnes (32.3%) and South West Wales 1.52 million tonnes (18.57%). Marine sand and gravel sales are highest in South East Wales at 450,000 tonnes (64.39%) with South West Wales accounting for 250,000 tonnes (35.71%).

4. CRUSHED ROCK

Table 2
Crushed Rock Sales by Rock type and End Use in 2024 (million tonnes)

	Coated Roadstone	Uncoated Roadstone	Concrete Aggregate	Fill/Other Construction Uses	Rail Ballast	TOTAL AGGREGATE
Limestone	0.41	0.44	1.04	2.84	0.0006	4.73
Sandstone	1.24	0.20	0.04	0.89	0	2.37
Igneous	0.36	0.01	0.02	0.78	0.005	1.18
TOTAL	2.01	0.65	1.1	4.51	0.01	8.28

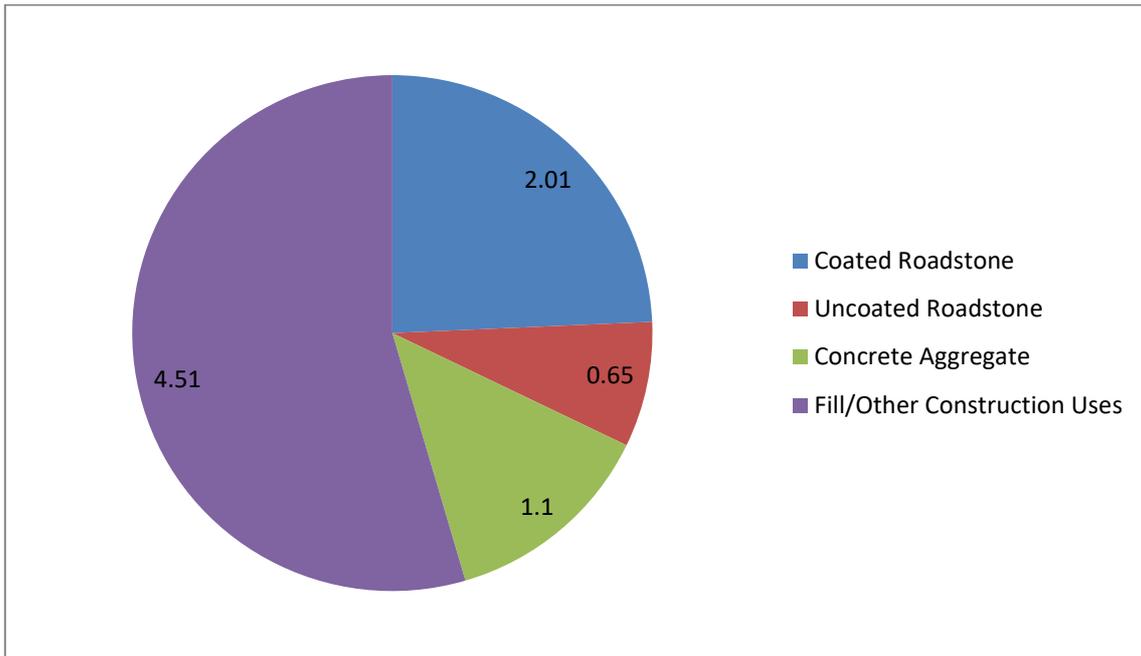
NB - Figures contain estimates where no survey return was provided

Table 3
Crushed Rock Sales by Rock type and End Use in 2023 (million tonnes)

	Coated Roadstone	Uncoated Roadstone	Concrete Aggregate	Fill/Other Construction Uses	Rail Ballast	TOTAL AGGREGATE
Limestone	0.24	0.48	1.12	2.87	0	4.71
Sandstone	1.3	0.33	0.05	0.95	0	2.63
Igneous	0.33	0.04	0.06	0.84	0	1.27
TOTAL	1.87	0.85	1.23	4.66	0	8.61

NB - Figures contain estimates where no survey return was provided

FIGURE 2 – Crushed Rock Sales by End Use 2024 (million tonnes)



4.1 Sales of crushed rock decreased for all rock types, with the exception of coated roadstone, which increased to 2.01 million tonnes, from 1.87 million tonnes in 2023.

4.2 Total limestone sales increased by 20,000 tonnes, total sandstone sales decreased by 260,000 tonnes, and total igneous sales decreased by 90,000 tonnes in 2024 compared to sales in 2023.

4.3 Fill/other constructional uses remains the primary use for crushed rock, utilising 54.5% of all sales (up by 0.5% from 2023). Coated roadstone utilises 24.3% (up by 2.6% from 2023), uncoated roadstone utilises 7.9% (down 2% from 2023) and concrete aggregate utilises 13.3% of all rock sales (down 1% from 2023).

Table 4

Crushed Rock Sales by Mineral Planning Authority 2022-2024 (million tonnes)

Sub-Region	Mineral Planning Authority	Crushed Rock Sales 2022		Crushed Rock Sales 2023		Crushed Rock Sales 2024				
Powys (inc Brecon Beacons)	Powys	2.68		2.67		2.67				
	Brecon Beacons NP									
South West Wales	Carmarthenshire	0.82	1.59	0.99	1.76	0.91	1.52			
	Neath Port Talbot									
	Pembrokeshire	0.51		0.45		0.32				
	Pembrokeshire Coast NP	0.18		0.22		0.21				
	Ceredigion	0.08		0.1		0.06				
	Swansea	0		0		0				
South East Wales	Blaenau Gwent	1.37	3.38	2.23	4.18	2.0	4.09			
	Caerphilly									
	Rhondda Cynon Taf									
	Merthyr Tydfil	2.01		1.95		2.1				
	Torfaen							0	0	0
	Newport							0	0	0
	Monmouthshire							0	0	0
	Bridgend									
	Cardiff									
Vale of Glamorgan										
TOTAL		7.65		8.61		8.28				

4.5 Table 4 sets out the crushed rock aggregate sales figures subdivided by sub-region and Local Planning Authority; however, some data has been amalgamated for confidentiality reasons.

4.6 Sales of crushed rock in Powys/BBNPA remained the same between 2023 and 2024.

4.7 Sales in South West Wales decreased by 260,000 tonnes between 2023 and 2024 having seen a brief increase of 170,000 tonnes between 2022 and 2023.

4.8 Sales in South East Wales decreased by 80,000 tonnes between 2023 and 2024 having seen a substantial increase of 800,000 tonnes between 2022 and 2023.

LANDBANK

4.9 A landbank is a stock of planning permissions for the winning and working of minerals. The landbank figures in Table 5 below have been calculated according to the methodology set out in the RTS2 in that the historical sales figures should reflect, not just the 10-year average (as had been used in the First Review) or the 3-year sales average as set out in MTAN1, but the highest of the 10-year and 3-year averages for each individual LPA. The permitted reserves are those estimated to be suitable for production of saleable aggregates, including low quality fill. Where operators did not provide information on aggregate sales and/or reserves, best estimates have been made from the local knowledge of Local Planning Officers and any past returns.

4.10 Caution must be exercised in using these landbank figures. The landbank calculation does not take account of geographical or operational aspects which may restrict the availability of certain types of reserves and constraints that may be placed upon working the total tonnage of planned reserves as a result of changes in planning policy, the designation of protected sites or other (non-planning) permitting requirements. In addition, the reserves in many cases have been estimated using limited sampling and testing information and the marketing conditions prevailing at the time and may be subject to revision.

4.11 Dormant sites (Sites with planning permission where working cannot re-commence until full modern conditions have been approved by the local planning authority) and sites where planning permission has been suspended (a Review of Minerals Permission has become ‘stalled’ and the permission ceases to authorise any minerals development until the review is completed) have not been included in the landbank calculations. Local Planning Authorities should carry out their own assessments of the likelihood of reactivation of each site but in any case, dormant reserves must be counted separately.

4.12 It is important to note that reserves earmarked as being suitable for aggregates may also be suitable for non-aggregate use. Many carboniferous limestone hard rock quarries produce significant amounts of rock suitable for both uses and these may change from year to year with market demand. Whilst many quarries may have less than 10% non-aggregates, some may have up to 90%. Non-Aggregate reserves have **not** been included in the landbank calculations.

Table 5 Crushed Rock Reserves and Landbanks on 31.12.2024 by Mineral Planning Authority (million tonnes) based on 3-year average sales 2022-2024 and the 10-year average sales 2015-2024				
Mineral Planning Authority	Crushed Rock Reserve 31.12.2024	3-year Average Annual Sales 2022-2024	10-year Average Annual Sales 2015-2024	Landbank (years) based on highest average
Powys	159.15	2.77	2.96	>50
Brecon Beacons NP				N/A
Carmarthenshire	76	0.90	1.06	>50
Neath Port Talbot				>50
Pembrokeshire	11.43	0.43	0.40	26.5
Pembrokeshire Coast NP	6.85	0.20	0.14	N/A
Ceredigion	5.01	0.08	0.11	45.5
Swansea	0	0	0	0
Blaenau Gwent	95.72	1.86	1.44	4.2
Caerphilly				17.9
Rhondda Cynon Taf				30
Merthyr Tydfil				>50

Torfaen	0	0	0	0
Newport	0	0	0	0
Monmouthshire	*	*	*	>50
Bridgend				>50
Cardiff	94.25	2.01	2.23	25
Vale of Glamorgan				30

4.13 The crushed rock reserves indicated above are made up of the following percentage of rock types:

- Powys/BBNPA – 80.4% Sandstone, 12.8% Igneous and 6.8% Limestone
- South West Wales – 44.7% Limestone, 47.5% Sandstone and 7.8% Igneous
- South East Wales – 82.6% Limestone, 17.4% Sandstone

4.14 On the basis of the figures in Table 5, Blaenau Gwent and Caerphilly, have a landbank of less than 25 years (see 9.4 below), and Cardiff has a landbank of 25 years exactly. Where landbanks exceed 50 years these have been shown as greater than 50 years as some landbanks are arithmetically high due to significant reductions in production but could reduce very quickly if production increased. The arithmetical landbank figures, expressed in years, would therefore give a potentially misleading picture.

**Table 6
Crushed Rock Reserves at Dormant/Suspended Sites by Mineral Planning Authority (million tonnes)**

Region	Mineral Planning Authority	Crushed Rock Reserve 31.12.2024
Powys (inc Brecon Beacons)	Powys	0.36
	Brecon Beacons NP	
South West Wales	Carmarthenshire	11.29
	Neath Port Talbot	0
	Ceredigion	0
	Pembrokeshire	0
	Pembrokeshire Coast NP	
	Swansea	0
South East Wales	Blaenau Gwent	5.21
	Caerphilly	
	Rhondda Cynon Taf	
	Merthyr Tydfil	
	Torfaen	0
	Newport	0
	Monmouthshire	0
	Bridgend	13.15
	Cardiff	
	Vale of Glamorgan	
	SOUTH WALES TOTAL	

4.15 Table 6 above sets out the reserves of crushed rock at dormant sites and sites where planning permission has been suspended. There is a substantial amount of such reserves in particular Authorities and where required (taking into account the likelihood of resumption of extraction at these sites) prohibition orders should be served to provide more reliable landbank figures overall. Although, it is noted that these reserves are not included within landbanks they can be used to offset against allocation requirements in a LDP provided an

assessment of the likelihood of the future operation of the site concludes that it is likely to reactivate.

5.0 LAND WON SAND & GRAVEL

Table 7 Land won Sand & Gravel Sales by end use 2023 & 2024				
	Tonnes 2023 (000)	2023 % (of total)	Tonnes 2024 (000)	2024 % (of total)
Building/soft sand for coating for asphalt/mortar	55	44	47.2	42
Concreting/sharp sand	22	18	16.3	14
Gravel – concrete aggregate, other uses	40	32	39.2	35
Raised material for constructional fill/unknown	8	6	10	9
Total	126	100	113 (rounded up)	100

FIGURE 3 – Land Won Sand and Gravel by End Use 2024

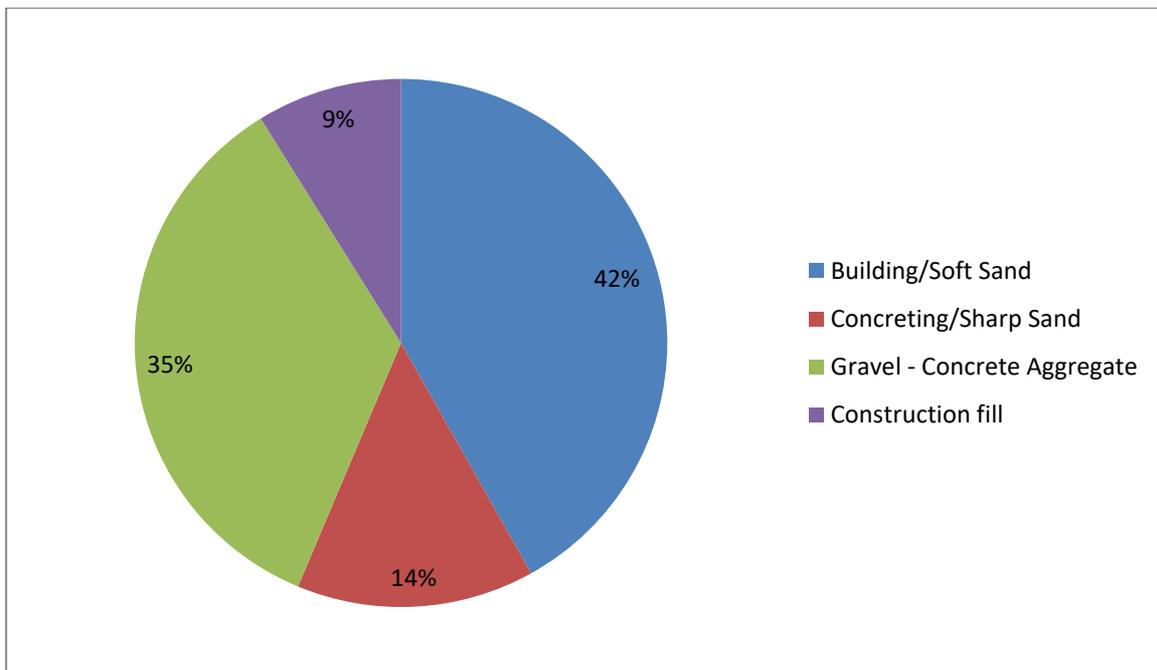


Table 8 Land Won Sand & Gravel Sales by Mineral Planning Authority (thousand tonnes)				
Region	Mineral Planning Authority	Sand & Gravel Sales 2022	Sand & Gravel Sales 2023	Sand & Gravel Sales 2024
Powys (inc Brecon Beacons)	Powys	220	126	113
South West Wales	Carmarthenshire			
	Ceredigion			
	Pembrokeshire Coast NP			

5.1 Table 8 shows the Local Planning Authorities where land won sand and gravel is produced. The total sales for 2024 have decreased by 14,000 tonnes from 2023, due in large part to a significant increase in sales of sand for non-aggregate (69,040 tonnes) for the second year in row. Without this significant shift to non-aggregate products the total would be closer to 2022 levels, (at 182,000 tonnes) although this would still be a decrease of 38,000 tonnes from the 2022 sales.

LANDBANK

5.2 Table 9 below sets out the land won sand and gravel landbank in the same way as the crushed rock landbank has been set out in Section 4 above. It includes both the three-year sales average and the 10-year sales average. Dormant sites have **not** been included.

Table 9 Land Won Sand & Gravel Reserves and Landbanks by Mineral Planning Authority (million tonnes) based on 3-year average sales 2022-2024 and the 10-year average sales 2015-2024				
Mineral Planning Authority	Sand & Gravel Reserve 2024	3-year Average Annual Sales 2022-2024	10-year Average Sales 2015-2024	Landbank (years) based on highest average
Powys	3.62	0.15	0.18	>50
Carmarthenshire				>50
Ceredigion				36.7
Pembrokeshire Coast NP				N/A

5.3 In the 2023 SWRAWP report Ceredigion had a landbank of less than 22 years, but following the grant of an extension in 2024, and with the drop in sales (and the subsequent change in averages) the landbank for Ceredigion has increased to a healthier 36.7 years. The

West Wales Sub-region together with Carmarthenshire is working collaboratively to plan strategically for adequate reserves of land won sand and gravel in the period up until 2044 rather than relying on Ceredigion in isolation. Discussions between the four Authorities have taken place and will continue with a view to producing a Statement of Sub-regional collaboration as required by RTS2.

5.4 Care must be exercised in relying on the landbank figures for Powys and Carmarthenshire as these are based on very small annual sales from relatively small sites.

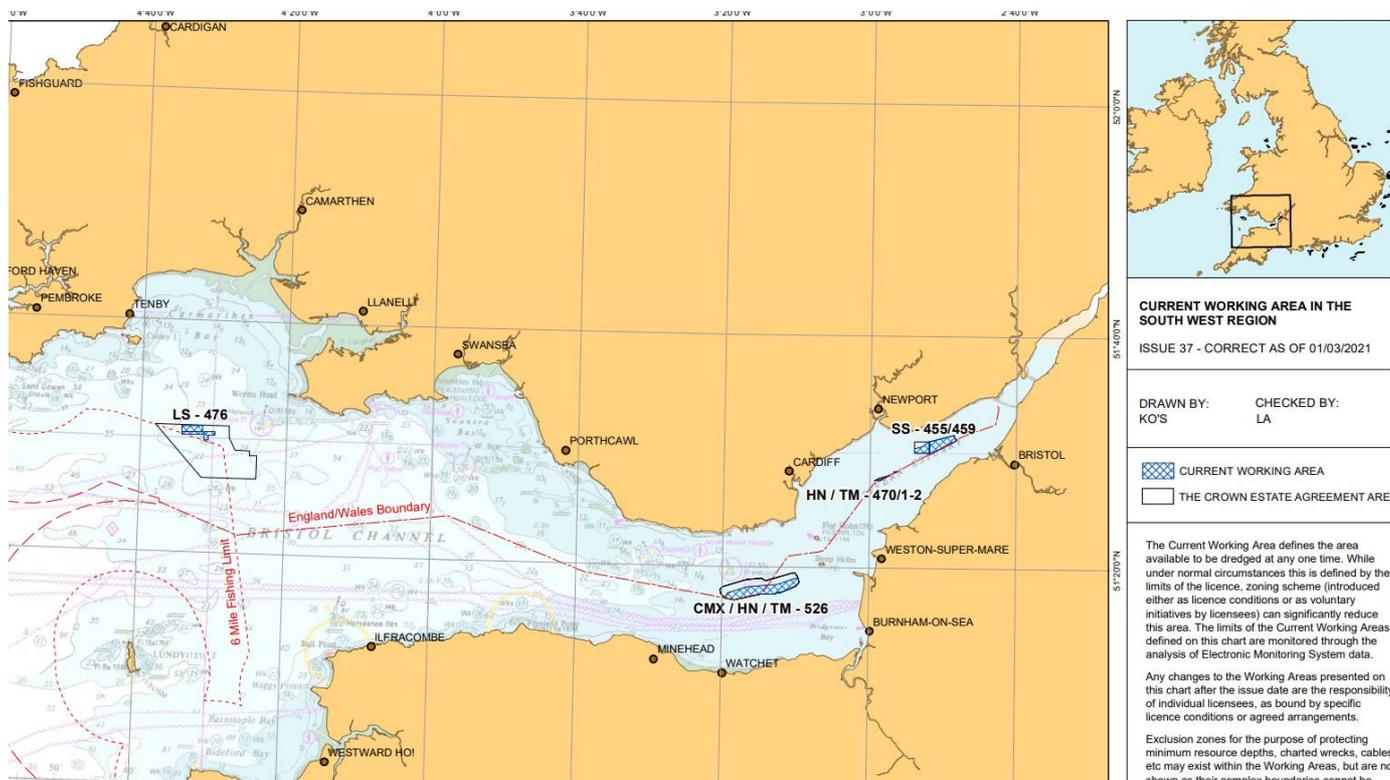
6.0 MARINE DREDGED SAND & GRAVEL

6.1 Marine Dredged Sand and Gravel is landed in the Region by Cemex UK Marine Ltd, Heidelberg Materials UK Aggregates Marine Ltd, Tarmac Marine Ltd, Severn Sands Ltd and Llanelli Sand Dredging Ltd.

6.2 Marine Licences (as at December 2024) exist in Welsh waters for North Middle Ground, Culver Extension (Area 526), North Bristol Deep (Area 470/1 and 470/2) and Nobel Bank (Area 472). A site with both planning permission and a Marine Licence at Bedwyn Sands, Monmouthshire also contributes towards sales data. There are also licences in English waters of the Bristol Channel. Production from Welsh licence areas may be exported to England and vice versa. Map 2, below, shows the location of the current active licenses

MAP 2

Current Marine dredging area in the South West Region



(Source [1720791467-2021-mar-south-west-current-working-areas.pdf](https://www.gov.uk/government/uploads/system/uploads/attachment_data/file/172079/1467-2021-mar-south-west-current-working-areas.pdf))

Table 10
Port Statistics for Marine Dredged Aggregate Landings

Mineral Planning Authority	Landing Port	2022 Tonnages	2023 Tonnages	2024 Tonnages
Neath Port Talbot	Port Talbot	14,226	8,000	5,507
Carmarthenshire	Burry Port	138,261	179,965	183,254
Cardiff	Cardiff Docks	193,044	183,945	181,752
Pembrokeshire	Port of Pembroke	19,562	15,200	20,320
Newport	Newport Docks	243,633	337,234	271,358
Monmouthshire (Bedwyn Sands)	Newport	*	*	*
Swansea	Swansea Docks	24,266	26,711	43,143
Total		632,992	749,355	705,334

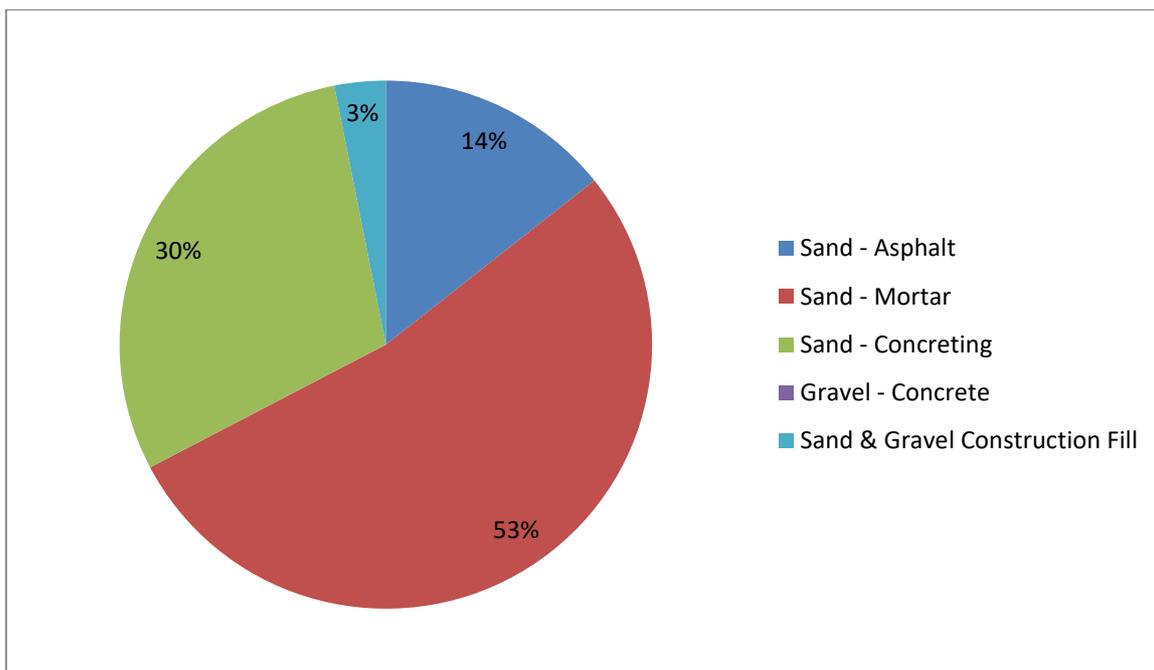
Source: The Crown Estate Summary of Statistics 2024

* The aggregate removed from the Bedwyn Sands in Monmouthshire is partly above low water mark and that area is therefore under the jurisdiction of the Local Planning Authority. The material is landed in Newport by a single Company. The landing data for that Company is therefore confidential.

6.3 Landings of marine sand and gravel have decreased between 2023 and 2024 at Port Talbot, Cardiff and Newport, the remaining ports all saw an increase in landings, although overall landings have dropped by 44,021 tonnes from 2023.

Table 11 Marine Sand & Gravel Sales by end use 2023 & 2024 (000 tonnes)				
	Tonnes 2023	Tonnes %	Tonnes 2024	Tonnes %
Sand – Asphalt	121.3	16.19	101	14.3
Sand – Mortar	408.3	54.5	373.7	53
Sand – Concreting	212.8	28.4	208,7	29.6
Gravel (suitable for concrete aggregates)	0	0	0	0
Sand & Gravel (suitable for construction fill)	6.8	0.9	21.9	3.1
Total	749	100	705.3	100

FIGURE 4 – Marine Sand and Gravel Sales by End Use 2024



6.4 Marine Sand and Gravel Sales in 2024 have exceeded the amount of material dredged from Crown Estate licence areas, which was recorded by the Crown Estate as 699,043 tonnes. Part of the reason for this difference is that sales figures include material dredged from the Bedwyn Sands which is not within The Crown Estate. In addition, there would be sales from stocks being held at the wharfs and differences in timing between sales and landings. Conversion factors from cubic metres to tonnes may also be playing a part.

6.5 Sales of marine sand and gravel have decreased from 749,000 tonnes in 2023 to 705,000 in 2024, a decrease of circa 44,000 tonnes. Sales of sand for concrete have shrunk from 212,000 tonnes to 208,000 tonnes. Sales of sand for asphalt have declined from 121,000 tonnes to 101,000 tonnes. Sales of sand and gravel for construction fill have increased from 6,800 to 21,900. Sales of sand for mortar have shown a more marked decrease from 408,000 to 373,000

7. SECONDARY AGGREGATES

7.1 Secondary Aggregates are usually defined as

- aggregates obtained as a by-product of other quarrying and mining operations, such as china clay waste, slate waste and colliery spoil, or
- aggregates obtained as a by-product of other industrial processes, such as blast furnace slag, coal-fired power station ash, incinerator ash and spent foundry sand.

A list of Secondary Aggregate sites within the SWRAWP Region is set out in Appendix C

7.2 The Survey response in relation to Secondary Aggregate Sales in 2024 was negligible, the returns that were received totalled under 200 tonnes

8. RECYCLED AGGREGATES

8.1 Recycled Aggregates are defined as aggregates obtained from the demolition or construction of buildings or structures or from civil engineering works, including asphalt road planings and railway ballast. A list of known aggregate recycling facilities in the SWRAWP Region is set out in Appendix D.

8.2 Even though recycled materials play an important role as a substitute for primary aggregates it is difficult to obtain accurate figures of the volumes produced and survey returns were negligible, as with secondary aggregates, with returns totalling only approximately 700 tonnes. Natural Resources Wales has undertaken a National Construction & Demolition waste survey for 2019 [Natural Resources Wales / Construction and demolition waste survey for 2019](#)

9. RTS 2nd REVIEW

9.1 The Regional Technical Statement (RTS) is a requirement of Minerals Technical Advice Note 1: Aggregates (MTAN1) which was issued by the Welsh Government in March 2004.

9.2 MTAN1 sets an overarching objective which seeks to ensure a sustainably managed supply of aggregates (which are essential for construction), striking the best balance between environmental, economic and social considerations. The RTS provides a strategic basis for aggregate provision within LDPs in the region.

9.3 The first Regional Technical Statement for the area covered by the South Wales Regional Aggregates Working Party was published in October 2008. The RTS 1st Review was published in August 2014 and the RTS 2nd Review was published in September 2020.

9.4 The RTS2 recommends that provision be made for aggregate supply from each Local Planning Authority area is essentially based on an annualised apportionment figure, being the higher of the 3-year sales average and the 10-year average of sales, refined as necessary taking account of annualised housing completion figures and other factors of sustainability. The required provision is calculated by applying the annualised apportionment over 25 years for crushed rock (LDP period plus 10 years) and 22 years for sand and gravel (LDP period plus 7 years).

9.5 The annualised apportionments for crushed rock contained within Table 5.3 of the RTS2 (as corrected by the Policy Clarification Letter dated 11 November 2021)¹ are provided in Table 12 below together with the sales figure for 2023. The purpose of this comparison is to assess whether there is a danger of under-provision within any Local Authority area. Sales exceeding the annualised apportionment figure is merely an early warning that aggregate reserves are being used more quickly than anticipated in the RTS2 and there may be a danger of under-provision within the Local Development Plan period. Further detailed assessment would be required in each case.

¹ https://www.gov.wales/sites/default/files/publications/2021-11/regional-technical-statements-for-aggregates-2nd-review-clarification-letter_0.pdf

Table 12
Crushed Rock Sales in 2024 by Mineral Planning Authority (million tonnes) in comparison to the RTS2 annualised apportionment

Region	Mineral Planning Authority	Crushed Rock Sales 2024	RTS2 Annualised Apportionment
Powys (inc Brecon Beacons)	Powys	2.67	3.519
	Brecon Beacons NP		0.368
South West Wales	Carmarthenshire	0.92	1.102
	Neath Port Talbot		0.305
	Pembrokeshire	0.32	0.677
	Pembrokeshire Coast NP	0.22	0.259
	Ceredigion	0.06	0.272
	Swansea	0	0.305
South East Wales	Blaenau Gwent	2.0	0.204
	Caerphilly		0.546
	Rhondda Cynon Taf		0.765
	Merthyr Tydfil		0.204
	Torfaen	0	0.150
	Newport	0	0.452
	Monmouthshire	0	0.242
	Bridgend	2.08	0.711
	Cardiff		1.411
	Vale of Glamorgan		0.682
SOUTH WALES TOTAL		8.27	12.174

9.6 None of the sales from Authorities in South Wales exceeded the annualised apportionments as set out in RTS 2. In the South Wales context as a whole, sales were approximately 68% of the total annualised apportionment calculated for the region.

9.7 RTS2 recommends a minimum tonnage allocation (to be met within a Local Development Plan through the identification of areas of land for future mineral working) for each of the following Local Planning Authority areas – Ceredigion (1.428 million tonnes), Pembrokeshire (212,000 tonnes), Swansea (7.636 million tonnes), RCT (9.295 million tonnes), Cardiff (7.475 million tonnes), Newport (11.3 million tonnes), Torfaen (3.75 million tonnes) and Blaenau Gwent (3.78 million tonnes). To date only RCT has met its allocation with the granting of planning permission for an extension of Craig yr hesg Quarry although Blaenau Gwent does have allocations in its LDP.

9.8 The annualised apportionments for sand and gravel contained within the RTS2 are provided in Table 13 together with the sales figure for 2022.

Table 13 Sand and Gravel Sales in 2024 by Mineral Planning Authority (million tonnes) in comparison to the RTS annualised apportionment			
Region	Mineral Planning Authority	Sand & Gravel Sales 2024	RTS Annualised Apportionment
South West Wales	Carmarthenshire	0.13	0.003
	Pembrokeshire		0
	Pembrokeshire Coast NP		0.118
	Ceredigion		0.188
SOUTH WALES TOTAL		0.13	0.309

9.9 In the South Wales context as a whole, sales were approximately 42% of the total annualised apportionment required within the region. Again, as mentioned at para 5.1 this drop in sales, and, therefore, the percentage of the annualised apportionment, has come about partly due to a significant increase in sand and gravel sales going to non-aggregates markets.

9.10 RTS2 recommended minimum allocations necessary in – Ceredigion (3.626 million tonnes). There are allocations within the current Local Development Plan, but these will not meet the entire allocation requirement.

9.11 The RTS2 notes that the apportionment recommendations do not take fully into account all factors that may be material to the ensuring of an adequate supply of aggregates obtained from appropriately located sources. Such factors include:-

- The technical capability of one type of material to interchange for another.
- The relative environmental cost of substitution of one type of material by another.
- The relative environmental effects of changing patterns of supply.
- Whether adequate production capacity can be maintained to meet the required supply.

9.12 The RTS2 also states [Annex A] that in exceptional circumstances where it is justified by new (e.g. more up to date, more detailed or more precise) evidence, it is open for individual Local Planning Authorities to depart from the annualised apportionment and allocation figures recommended in the RTS when preparing their LDP policies. In doing so however, a Local Planning Authority would need to demonstrate that through collaboration with other LPAs and consultation with relevant stakeholders their intended departure would not undermine the overall strategy provided by the RTS itself

10. MAJOR INFRASTRUCTURE PROJECTS

Major infrastructure projects are an important consideration in the assessment of the future demand for aggregates. The following is a list of projects which may have an impact on future demand if they go ahead, or, if approved, if they are implemented.

Pre-app

- 750k for research into tidal lagoons from Welsh Government
- £1 mill match funding for offshore wind in Milford
- Mersey tidal lagoon – funding committed by joint authorities
- pre-app for working through Bedwas tips (Caerphilly) – approx. 5 million m³
- Outline Business Case submitted to Welsh Government in November 2024 for Aberystwyth Coastal defence work.
- Cardiff Eastern Bay Link Road improvement
- Cardiff Capital Region Metro Project – Funding for Phase 1a from Cardiff Central Interchange to Cardiff Bay. Further phases planned 1b extension to Pierhead Street and phase 2 from Radyr to a new link south of Cardiff Central Interchange.
- Port of Port Talbot (Part of Celtic Freeport) – Various projects including FLOW, Switch, Lanzatech Sustainable Aviation Fuel (Permission granted)

Application being considered, no determination so far

No current information

Approval issued, not progressed to date

Global Centre for Rail Excellence, Onllwyn (Powys / Neath Port Talbot) – situation here is complicated, various planning approvals granted but not able to commence yet, and funding being applied for/finalised

Afan Valley Adventure Resort (Wildfox)

Approval issued, works going on

- A465 Heads of the Valleys Road dualling
- Swansea City Centre and Fabian Way Redevelopment
- A40 Llanddewi Velfrey to Penblewin Road Improvements = on going

- Coed Darcy (approx. 2,000 houses + commercial development), Llandarcy
- Cardiff Airport and St Athan Enterprise Zone – now known as Cardiff airport and Bro Tathan Enterprise Zone
- Land at Upper Cosmeston Farm, Lavernock - 576 units (subject to 106)
- Land West of Swanbridge Road, Sully - 500 units (under construction)
- Aberaeron Coastal Defence Scheme (under construction)
- Flood defence scheme on Pengam Foreshore, Cardiff (under construction)
- Major housing developments in Cardiff (approx. 20,000 dwellings with planning consent with over 2,000 under construction)
- P2024/0711 for the construction of an Electric Arc Furnace (EAF) at the Port Talbot Steelworks was approved on 7th March 2025 – NO WORKS COMMENCED AS OF YET
- Continued A465 Heads of the Valleys Road dualling.
- Over 1,000 units remaining to be built on the active site in Llanharan
- Recent start of the 460 unit development in Pontyclun, Llantrisant
- Pems, Celtic Freeport, green link, energy storage, wind turbines, phases 1-4 have permission, reserved matters are being agreed

Application refused, appeal

11. MONITORING OF PLANNING APPLICATIONS

Planning Applications and Decisions up to 2024

Planning Reference	Planning Authority	Site Name	Type	Mineral	Reserve	Date Submitted	Decision	Date
C/2022/0171	Blaenau Gwent	Trefil Quarry (Blaenau Gwent)	Ext	Limestone	5.565 T	2022	Pending	
C/2022/0280	Blaenau Gwent	Trefil Quarry (Blaenau Gwent)	EoT	Limestone	Nil	2022	Pending	
19/17586/FUL	Brecon Beacons National Park Authority	Penderyn Quarry	Reserves Swap within the quarry boundary	Limestone	Reduction of 7.4 MT	27.06.19	Granted	12.01.21
20/0702/FUL	Caerphilly	Bryn Quarry (Gelliargwellt Uchaf Farm), Gelligaer (Caerphilly)	Ext	Sandstone	2.6Mt	24.08.20	Refused (Appeal Lodged)	
24/0525/FUL	Caerphilly	Bryn Quarry (Gelliargwellt Uchaf Farm), Gelligaer (Caerphilly)	Ext	Sandstone	6.1Mt	12.07.2024	Recommended to approve at committee – awaiting decision to be issued	
20/02351/MJR	Cardiff	Taffs Well Quarry	Ext	Limestone	4 Mt	15.11.20	Approved	12.9.2023
22/03047	Cardiff	Tonmawr	EoT (20 years)	Limestone	Nil	21.12.22	Awaiting decision	
24/00306/VAR	Cardiff	Taffs Well	S73 (deepening quarry)	Limestone	3 Mt	9.2.2024	Awaiting decision	
A211145	Ceredigion	Coed Faedre Quarry	EoT (10 years)	Sandstone	Nil	27.01.22	Approved	24.05.22
A230919	Ceredigion	Cardigan Sand and Gravel (Penparc)	Extension to existing site	Sand and gravel	595,000	03.01.24	Approved	8.11.24
P2021/1230	Neath Port Talbot	Bwlch ffos Quarry	Screening	Sandstone	Nil	08.12.21	Screening Opinion	18.01.22
P2024/0391	Neath Port Talbot	Bwlch Ffos Quarry	Prior approval for recovery of materials in accordance with Part 23,	sandstone	Circa 20,000	17.6.2024	approved	15.07.2024

			Class B of GPDO					
P2022/1040	Neath Port Talbot	Cwm Nant Lleuci (NPT)	EoT	Sandstone	Nil	13.12.22	Granted	2.8.2023
23/1093/PA	Pembrokeshire	Blaencilgoed	EoT for importation of gritstone	Limestone	Nil	18.03.2024	Granted	24.06.2024
21/1265/PA	Pembrokeshire	Rushacre Quarry	EoT (2 years)	Shale	Nil	24.03.22	Approved	02.12.22
23/0359/MN	Pembrokeshire	Rushacre Quarry	Extension to existing Quarry	shale	100,000	23.09.2023	Approved	09.02.2024
23/0215/PA	Pembrokeshire	Penlan Farm Quarry, (Pembrokeshire)	EoT (5 years)	shale	Nil	8.6.2023	Granted	12.9.2023
22/0568/PA	Pembrokeshire	Tangiers Quarry	EoT (11 years)	Shale	Nil	04.10.22	Granted	25.5.2023
23/0530/MN	Pembrokeshire	Glogue Quarry	EoT	Shale/slate waste	nil	18.09.23	Granted	06.06.2024
23/0531/MN	Pembrokeshire	Glogue Quarry	EoT	Shale/slate waste	nil	18.09.23	Granted	06.06.2024
NP/22/0316/S73	Pembrokeshire Coast National Park Authority	Trefigin Quarry	EoT (12 years)	Sand & Gravel	Nil	12.05.22	Approved	15.09.22
NP/24/0068/S73	Pembrokeshire Coast National Park Authority	Pantgwyn Quarry	EoT – March 2031	Sand and gravel	nil	14.02.24	Approved	12.12.24
15/0666/10	Rhondda Cynnon Taf	Craig yr Hesg, Pontypridd,	Ext	Sandstone	10 Mt	15.05.15	Refused (Appeal Allowed)	11.10.22
21/0720/15	Rhondda Cynnon Taf	Craig yr Hesg, Pontypridd, (Rhondda Cynon Taf)	EoT (6 years)	Sandstone	Nil	17.05.21	Refused (Appeal Allowed)	11.10.22

12. MONITORING REVIEWS OF MINERAL PERMISSIONS

ROMP Applications up to 2024							
Planning Reference	Site Name	Type	Mineral	Reserve (mt)	EIA	Date Submitted	Decision Date
11/06445	Penderyn Quarry (BBNPA)	Periodic	Limestone	26.3	Yes	24 March 2011	
P/2013/0642	Caerfagu Quarry (Powys)	Periodic	Sand & Gravel	0.1	Yes	20 June 2013	Suspended
15/0365/MN	Blaencilgoed Quarry (Pembrokeshire)	Periodic	Limestone	10	Yes	30 June 2015	

2019/01340/FUL	Ruthin Quarry (Vale of Glamorgan)	Initial	Limestone	8.5	Yes	05 Dec 2019	18.10.2024
22/21315/MIN	Vaynor Quarry (BBNPA)	Periodic	Limestone	6.2	Yes	05 Aug 2022	
P/22/0206	Vaynor Quarry (Merthyr)	Periodic	Limestone	42.6	Yes	05 Aug .2022	
2024/00246/ENV	Pantyyffynnon Quarry / Seth Hill Quarry, Bonvilston (Vale of Glamorgan)	Periodic	Limestone	0.62	Yes	15 Mar 2024	Pending
PL/07270	Garn Wen Quarry (Carms)	Periodic	Igneous	10.5	No	14 Feb 2024	Pending

13. MONITORING EXTRACTION END DATES AND REVIEW DATES

Mineral Planning Authority	Site Name	Mineral Type	Mineral Extraction Ends	ROMP Review Date
Blaenau Gwent	Trefil	Limestone	31 Dec 2024	N/A
Brecon Beacons National Park	Ammanford	Limestone	21 Feb 2042	N/A
	Penderyn	Limestone	21 Feb 2042	Pending
	Vaynor (shared with Merthyr Tydfil)	Limestone	31 May 2097	Pending
	Llanfair	Sandstone	21 Feb 2042	Dormant
	Cefn Cadlan	Sandstone	21 Feb 2042	Dormant
Bridgend	Cornelly	Limestone	31 Dec 2056	22 Dec 2031
	Gaens	Limestone	06 Jan 2068	22 Dec 2031
	Grove	Limestone	31 Dec 2056	22 Dec 2031
	Stormy Down	Limestone	21 Feb 2042	Dormant
	Cefn Cribbwr	Sandstone	21 Feb 2042	Dormant
Caerphilly	Machen	Limestone	31 Dec 2042	22 Jun 2031
	Cwm Leyshon	Limestone	21 Feb 2042	27 Oct 2025
	Blaengwynlais (shared with Cardiff)	Limestone	21 Feb 2042	26 Sep 2029
	Hafod Fach	Limestone	31 Dec 2027	N/A
	Bryn	Sandstone	31 Dec 2022	N/A
	Cefn Onn	Limestone	21 Feb 2042	Dormant
Cardiff	Creigiau	Limestone	21 Feb 2047	21 Dec 2033
	Taffs Well	Limestone	31 Dec 2027	31 Dec 2022 (application pending)
	Ton Mawr	Limestone	31 Dec 2022	30 Sep 2024 (application pending)
	Blaengwynlais (shared with Caerphilly)	Limestone	21 Feb 2042	16 Oct 2029
	Cefn Garw	Limestone	21 Feb 2042	N/A
Carmarthenshire	Alltygarn	Sandstone	21 Feb 2042	06 Mar 2032
	Blaenyfan	Limestone	21 Feb 2042	04 Oct 2031
	Coygen	Limestone	21 Feb 2042	07 Feb 2033
	Maesdulais	Limestone	21 Feb 2042	13 Mar 2032
	Crwbin	Limestone	21 Feb 2042	01 Sep 2032
	Garn Wen	Igneous	21 Feb 2042	01 Feb 2024

	Garn Bica	Limestone	Expired – ROMP not submitted	N/A
	Torcoed	Limestone	31 Dec 2055	01 Sep 2032
	Dinas	Sandstone	31 Dec 2070	8 Oct 2028
	Llwynjack	Sand & Gravel	21 Feb 2042	8 Jan 2029
	Limestone Hill	Limestone	21 Feb 2042	Dormant
	Llwynyfran	Limestone	21 Feb 2042	Dormant
	Penybanc	Limestone	21 Feb 2042	Dormant
	Pwllymarch	Limestone	21 Feb 2042	Dormant
	Ty'r Garn	Limestone	21 Feb 2042	Dormant
	Cynghordy	Sandstone	21 Feb 2042	Dormant
	Garn	Sandstone	21 Feb 2042	Dormant
	Cerrig-yr-wyn	Igneous	21 Feb 2042	Dormant
	Glantowy	Sand & Gravel	21 Feb 2042	Dormant
	Foelfach	Sandstone	15 Aug 2034	15 Aug 2029
	Pennant	Sandstone	30 Jan 2030	N/A
Ceredigion	Alltgoch (and Bryn)	Sandstone	21 Feb 2042	N/A
	Penparc	Sand & Gravel	15 Mar 2029	N/A
	Crug Yr Eryr	Sand & Gravel	10 Mar 2026	N/A
	Glanyrafon	Sand & Gravel	30 Sep 2024	PP Expired
	Coed Faedre	Sandstone	24 May 2032	N/A
	Moelfryn Maen	Shale/Shale	13 Apr 2031	N/A
	Pant	Sand & Gravel	31 Dec 2023	PP Expired
	Tylau	Sandstone/Shale	01 Dec 2033	N/A
	Ystrad Meurig	Sandstone	31 Jan 2052	28 Nov 2028
Merthyr Tydfil	Gelligaer	Sandstone	2 April 2076	9 Dec 2030
	Vaynor (shared with BBNPA)	Limestone	31 May 2097	Pending
Monmouthshire	Ifton	Limestone	26 Feb 2045	N/A
Neath Port Talbot	Cwm Nant Lleici	Sandstone	01 Jul 2040	2 Aug 2038
	Gilfach	Sandstone	28 Feb 2033	N/A
	Port Talbot	Sand	21 Feb 2042	10 Feb 2032
Pembrokeshire Coast National Park	Carew	Limestone	28 Feb 2042	19 Jun 2034
	Syke	Igneous/Sandstone	21 Feb 2042	9 Jun 2030
	Rhyndaston	Igneous	31 Dec 2026	N/A
	Pantgwyn	Sand & Gravel	16 Mar 2031	N/A
	Trefigin	Sand & Gravel	18 Mar 2040	15 Sep 2037
	Penberry	Igneous	21 Feb 2042	Dormant
Pembrokeshire	Blaencilgoed	Limestone	21 Feb 2042	Pending
	Cefn	Sandstone	3 Jul 2027	N/A
	Plascwrt Farm	Igneous	12 Nov 2024	PP Expired
	Slade Hall Farm	Shale	31 Dec 2049	5 May 2035
	Glogue	Slate	6 Jun 2044	6 Jun 2039
	Penlan	Shale	12 Sep 2028	N/A
	Tangiers Farm	Shale	1 Oct 2033	N/A
	Bolton Hill	Igneous	10 Feb 2053	12 Sep 2034
	Treffgarne	Igneous	21 Feb 2042	Dormant
	Gilfach	Shale	21 Feb 2042	Dormant *

				(there is an extant planning permission for secondary aggregates at the site and this part of the site is active)
	Rushacre Farm	Shale	17 Apr 2039	9 Feb 2039
Powys	Caerfagu	Sand & Gravel	21 Feb 2042	Suspended
	Gore	Sandstone	21 Feb 2042	31 Mar 2031
	Buttington Brickworks	Sandstone	22 Feb 2042	19 Apr 2026
	Criggion	Igneous	21 Feb 2042	31 Jan 2027
	Dolyhir/Strinds	Sandstone/Limestone	31 Dec 2111	17 Apr 2033
	Llanelwedd	Igneous	21 Feb 2042	N/A
	Little Gwern Villa	Sandstone	8 June 2033	N/A
	Tan y Foel	Sandstone	31 Dec 2063	16 Sep 2028
	Tredomen	Sandstone	30 Sep 2026	N/A
	Rhayader	Sandstone	21 Feb 2042	29 Nov 2029
	Middletown	Igneous	21 Feb 2042	22 Aug 2030
	Berwin Granite	Igneous	21 Feb 2042	Dormant
	Garreg	Igneous	21 Feb 2042	Dormant
Rhondda Cynon Taf	Craig yr Hesg	Sandstone	31 Dec 2047	11 Oct 2037
	Forest Wood (shared with Vale)	Limestone	21 Feb 2042	N/A
	Hendy Quarry	Limestone	21 Feb 2024	N/A
Vale of Glamorgan	Lithalun	Limestone	30 June 2040	30 Sept 2036
	Pantyffynnon	Limestone	21 Feb 2042	16 May 2040
	Longlands	Limestone	21 Feb 2042	01 Oct 2035
	Wenvoe	Limestone	31 Dec 2020	Pending
	Forest Wood (shared with RCT)	Limestone	21 Feb 2042	15 Apr 2026
	Aberthaw	Limestone	21 Feb 2042	N/A
	Pant	Limestone	21 Feb 2042	30 May 2029
	Ewenny	Limestone	21 Feb 2042	16 Jan 2034
	Garwa Farm	Limestone	31 Dec 2019	Pending
	Argoed Isha	Limestone	21 Feb 2042	Dormant
	Cnap Twt	Limestone	21 Feb 2042	Dormant
	Ruthin	Limestone	31 Dec 2022	18 Oct 2039
	St Andrews	Limestone	21 Feb 2042	Dormant
Beaupre	Limestone	21 Feb 2042	Dormant	

14. MONITORING OF DEVELOPMENT PLANS

Mineral Planning Authority	LDP Adoption
Caerphilly	LDP adopted in November 2010
Rhondda Cynon Taf	LDP Adopted in March 2011
Blaenau Gwent	LDP Adopted in November 2012
Pembrokeshire	LDP Adopted in February 2013
Ceredigion	LDP Adopted April 2013
Torfaen	LDP Adopted in December 2013
Brecon Beacons National Park	LDP Adopted in December 2013
Monmouthshire	LDP Adopted in February 2014
Carmarthenshire	LDP Adopted in December 2014
Newport	LDP Adopted in January 2015
Cardiff	LDP adopted in January 2016
Neath Port Talbot	LDP adopted in January 2016
Vale of Glamorgan	LDP adopted in June 2017
Powys	LDP adopted in April 2018
Swansea	LDP adopted February 2019
Merthyr Tydfil	LDP2 Adopted in January 2020
Pembrokeshire Coast National Park	LDP2 adopted September 2020
Bridgend	LDP2 Adopted March 2024

APPENDIX A

MEMBERS OF THE SOUTH WALES AGGREGATES
WORKING PARTY

(at date of publication)

Rhodri Griffiths (Chair)
Head of Place & Sustainability
Carmarthenshire County Council

Thomas R Boothroyd (Secretary)
Senior Minerals & Waste Planning Officer
Carmarthenshire County Council

Ffion Williams (Asst. Secretary)
Development Management Officer (Minerals & Waste)
Carmarthenshire County Council

Steve Smith
Development Services Manager
Blaenau Gwent County Borough Council
(Represented by Steph Hopkins)

Catherine Mealing-Jones
Chief Executive
Brecon Beacons National Park
(Represented by Davina Powell)

Jonathan Parsons
Head of Planning
Bridgend County Borough Council
(Represented by Louis Pannell)

Ryan Thomas
Planning Services Manager
Caerphilly County Borough Council
(Represented by Ian Mullis)

Simon Gilbert
Head of Planning
City of Cardiff Council
(Represented by Stuart Williams)

Russell Hughes-Pickering
Corporate Lead Officer Economy and Regeneration
Ceredigion County Council
(Represented by Sarah Groves-Phillips)

Judith Jones
Director of Neighbourhood Services
Merthyr Tydfil County Borough Council
(Represented by Craig Watkins)

Craig O'Connor

Head of Placemaking
Monmouthshire County Council
(Represented by Susan Hall)

Ceri Morris

Head of Planning and Public Protection
Neath Port Talbot County Borough Council
(Represented by Anjuli Davies)

Tracey Brooks

Head of Regeneration & Economic Development
Newport City Council
(Represented by John Gibson)

Harriet Lavender

Head of Planning
Pembrokeshire County Council
(Represented by Bob Smith)

Sara Morris

Director of Park Direction & Planning
Pembrokeshire Coast National Park
(Represented by Gayle Lister)

Gwilym Davies

Head of Public Protection, Planning and Property
Powys County Council
(Represented by Peter Morris)

Simon Gale

Director of Prosperity and Development
Rhondda-Cynon-Taf County Borough Council
(Represented by Owen Jones)

Phil Holmes

Head of Planning and City Regeneration
City & County of Swansea
(Represented by Ruth Henderson)

Rachel Jowitt

Strategic Director, Economy & Environment
Torfaen County Borough Council
(Represented by Adrian Wilcock)

Marcus Goldsworthy

Director of Place
Vale of Glamorgan Council
(Represented by Victoria Morgan)

Nick Horsley

Planning Director
Mineral Products Association Wales

Mark Russell

Representative MPAW - BMAPA
Mineral Products Association Wales

Mark Frampton

Representative MPAW - Heidelberg Materials UK
Mineral Products Association Wales

Andy Cadell

Representative MPAW –Tarmac
Mineral Products Association Wales

Mike McGee

Representative MPAW - Cardigan Sand and Gravel
Mineral Products Association Wales

Mike Phillips

British Aggregates Association

Joanne Smith

Welsh Government
Planning Division

Gareth Dudley Jones

Welsh Government
Planning Division

Vacant

Welsh Government
Dept. for Economy, Science and Transport

Justin Waite

Natural Resources Wales

Rob Anderson

The Crown Estate

Vacant
British Geological Survey

Vacant
Recycling Industry

Vacant
RWE npower

APPENDIX B

Sites Included In 2023 Aggregates Mineral Survey

Mineral Planning Authority	Site Name	Mineral Type	Site Owner or Operator	Designation
Blaenau Gwent	Trefil	Limestone	Gryphon Quarries Ltd	Active
Brecon Beacons National Park	Ammanford	Limestone	Messrs Williams & Griffiths	Active
	Penderyn	Limestone	Heidelberg Materials UK	Active
	Llanfair	Sandstone	Glanusk Estate	Dormant
	Cefn Cadlan	Sandstone	Tredeggar Estate	Dormant
	Vaynor (shared with Merthyr Tydfil)	Limestone	Heidelberg Materials UK	Inactive
Bridgend	Cornelly	Limestone	Cambrian Stone Ltd	Active
	Gaens	Limestone	TS Rees Ltd	Active
	Grove	Limestone	Tarmac	Inactive
	Cefn Cribwyr	Sandstone	TS Rees Ltd	Inactive
	Stormy Down	Limestone	Hobbs Holdings Ltd	Dormant
Caerphilly	Machen	Limestone	Heidelberg Materials UK	Active
	Hafod Fach	Sandstone	Tarmac	Active
	Bryn	Sandstone	A Price & Co	Active
	Cefn Onn	Limestone	Wyndham Lewis Trust	Dormant
	Cwm Leyshon	Limestone	Heidelberg Materials UK	Inactive
	Blaengwynlais (shared with Cardiff)	Limestone	Tarmac	Inactive
Cardiff	Blaengwynlais (shared with Caerphilly)	Limestone	Tarmac	Inactive
	Creigiau	Limestone	Tarmac	Active
	Cefn Garw	Limestone	Glen Harry Group	Inactive
	Taffs Well	Limestone	Breedon	Active
	Ton Mawr	Limestone	TS Rees Ltd	Active
	Roath Basin Wharf	Marine Sand	Cemex UK Ltd	Active
	Brassways Wharf	Marine Sand	Heidelberg Materials UK	Active
	Roath Dock	Marine Sand	Tarmac	Active
Carmarthenshire	Blaenyfan	Limestone	Gower Plant	Active
	Coygen	Limestone	GD Harries	Active
	Torcoed/Crwbin	Limestone	Tarmac	Active
	Garn Bica	Limestone	M Jones	Active
	Limestone Hill	Limestone	D Williams	Dormant
	Llwynyfron	Limestone	Hobbs Holdings Ltd	Dormant
	Maesdulais	Limestone	M Jones	Dormant
	Penybanc	Limestone	Mrs A Davies	Dormant
	Pwllymarch	Limestone	M Jones	Dormant
	Ty'r Garn	Limestone	G Morgan	Dormant
	Pennant	Sandstone	P Bowen	Active
	Alltygarn	Sandstone	Alan Griffiths	Inactive
	Cynghordy	Sandstone	D Roderick	Dormant
	Dinas	Sandstone	Tarmac	Inactive

Carmarthenshire (Cont.)	Garn	Sandstone	Mrs Morgan	Dormant
	Garn Wen	Igneous	GD Harries	Active
	Foelfach	Gritstone	P. O'Keefe	Active
	Llwynjack	Sand & Gravel	C Lewis	Active
	Glantowy	Sand & Gravel	A Lewis	Dormant
	Burry Port	Marine Sand	Llanelli Sand Dredging Ltd	Active
Ceredigion	Moelfryn Maen	Shale	RG & JV Jenkins	Active
	Alltgoch	Sandstone	GD Harries	Active
	Ystrad Meurig	Sandstone	Heidelberg Materials UK	Active
	Penparc	Sand & Gravel	Cardigan Sand & Gravel Co Ltd	Active
	Cryg yr Eryr	Sand & Gravel	DR Powell	Active
	Pant	Sand & Gravel	R Cutter	Active
	Glanyrafon	Sand & Gravel	CB Environmental	Inactive
	Tylau	Gritstone/Shale	K Morgan	Inactive
	Llechwedd Dderi Farm	Sand & Gravel	D Jones	Inactive
	Gwarallt Faerdre	Sandstone	I Evans	Inactive
Merthyr Tydfil	Vaynor (shared with BBNPA)	Limestone	Heidelberg Materials UK	Inactive
	Gelligaer	Sandstone	Heidelberg Materials UK	Active
Monmouthshire	Ifton	Limestone	Heidelberg Materials UK	Inactive
Neath Port Talbot	Cwm Nant Lleici	Sandstone	Hygrove Aggregates	Active
	Gilfach	Sandstone	Bredon	Active
	Port Talbot Steelworks	Sand	Associated British Ports	Inactive
	Gwrhyd Uchaf	Sandstone	Artisan Stone Supplies Ltd	Active
Newport	Alexandra Dock	Marine Sand	Severn Sands Ltd	Active
	Felnex Wharf	Marine Sand	Heidelberg Materials UK/ Tarmac	Active
Pembrokeshire Coast National Park	Carew	Limestone	T Scourfield & Sons	Active
	Penberry	Igneous	Mr Jamieson	Dormant
	Rhyndaston	Igneous	Mason Bros	Active
	Syke	Igneous/Sandstone	GD Harries	Active
	Pantgwyn	Sand & Gravel	L Rees	Active
	Trefigin	Sand & Gravel	Trefigin Quarries Ltd	Active
Pembrokeshire	Cefn	Sandstone	AD Plant	Inactive
	Bolton Hill	Igneous	GD Harries	Active
	Plascwrt Farm	Igneous	M Evans	Inactive
	Slade Hall Farm	Shale	NW Jones	Active
	Glogue	Slate/Secondary	Mansel Davies & Sons	Active
	Penlan	Shale	S Griffiths	Active

	Gilfach	Shale (secondary)	Mr Alan James	Active
	Tangiers Farm	Shale	Mason Bros	Active
	Blaencilgoed	Limestone	GD Harries	Active
	Rushacre Farm	Shale	G. James	Active
Powys				
	Gore	Sandstone	Tarmac	Active
	Dolyhir/Strinds	Sandstone/Limestone	Tarmac	Active
	Tan y Foel	Sandstone	HV Bowen & Sons	Active
	Tredomen	Sandstone	K Jones	Active
	Rhayader	Sandstone	Tarmac	Inactive
	Criggion	Igneous	Heidelberg Materials UK	Active
	Llanelwedd	Igneous	Heidelberg Materials UK	Active
	Little Wernwilla	Sandstone	R Mills	Active
	Buttington Brickworks	Sandstone	Border Hardcore & Rockery Stone	Active
	Middletown	Igneous	Border Hardcore & Rockery Stone	Active
	Berwyn Granite	Igneous	Powis Estate	Dormant
	Garreg	Igneous	Powis Estate	Dormant
	Caerfagu	Sand & Gravel	Caerfagu Products Ltd	Suspended
Rhondda Cynon Taf	Forest Wood (shared with Vale of Glamorgan)	Limestone	Heidelberg Materials UK	Inactive
	Hendy	Limestone	Tarmac	Inactive
	Craig yr Hesg	Sandstone	Heidelberg Materials UK	Active
Vale of Glamorgan	Aberthaw	Limestone	Tarmac	Active
	Garwa Farm	Limestone	Tarmac	Inactive
	Lithalun	Limestone	Heidelberg Materials UK	Active
	Pantyffynnon	Limestone	Seth Hill & Son	Active
	Wenvoe	Limestone	Bredon	Active
	Forest Wood (shared with RCT)	Limestone	Heidelberg Materials UK	Inactive
	Argoed Isha	Limestone	T Pritchard	Dormant
	Eweny	Limestone	Tarmac	Inactive
	Cnap Twt	Limestone	Duchy of Lancaster	Dormant
	Longlands	Limestone	Green Circle	Active
	Pant	Limestone	Tarmac	Inactive
	Ruthin	Limestone	Tarmac	Dormant
	St Andrews	Limestone	TJ Bowles	Dormant
	Aberthaw Power Station	PFA/FBA/Secondary	RWE npower	Active
Beaupre	Limestone	Unknown	Dormant	

APPENDIX C

List of Secondary Aggregate Sites in South Wales

Celsa UK, Celsa Works, East Moors Road, Cardiff, CF24 5NN

Generation Aggregates, Aberthaw, Vale of Glamorgan

Mansel Davies & Son Ltd, Glogue Quarry, Glogue Pembrokeshire

APPENDIX D

List of Recycled Aggregate Producers in South Wales

Bridgend

Shillibiers, 43 Village Farm Industrial Estate, Pyle, CF33 6NU

Caerphilly

Amber Services, The Recycling Centre, Willow Way, Dyffryn Business Park, Ystrad Mynach, Hengoed, CF82 7TR

Bryn Group, Gelliargwellt Farm, Gelligaer, Hengoed, CF82 8FY

GLJ Recycling Ltd, Chapel Farm Industrial Estate, Cwmcarn, Newport, Gwent, NP11 7NL

Heidelberg Materials at Machen Quarry near Newport.

Penyfan Processing & Recycling Ltd, Penyfan Leisure Park, Manmoel Rd, Manmoel, Blackwood, Gwent, NP12 0HY

Cardiff

Atlantic Recycling, Ty-To-Maen Farm, Newton Road, Rumney, Cardiff, CF3 2EJ

Neal Soil Suppliers Ltd, Ty-To-Maen Farm, Newton Road, Rumney, Cardiff, CF3 2EJ

Green Circle Concreate & Aggregates, Cefn Garw Quarry, Forest Road, Tongwynlais, Cardiff, CF15 7YZ

United Recycled Aggregates Limited, Cardiff Dock Site, Compass Road, Cardiff Docks CF10 4LL

Carmarthenshire

Carmarthenshire Recycling and Environmental Services, Cillefwr Industrial Estate, Carmarthen

Browns Waste Management and Recycling Ltd, Bynea, Llanelli, SA14 9SU

Browns Waste Management and Recycling Ltd, Llangennech, Llanelli, SA14 9SU

GD Environmental Services Ltd, Taybrite, Heol-Y-Bwlch, Bynea, Llanelli, SA14 9SU

Gwendraeth Valley Recycling Ltd, Carway Fawr Site Office, Cynheidre Colliery, Five Roads, Llanelli, Carmarthenshire, SA15 5YN

Julian Mousley & Sons, Cerrig-yr-wyn Quarry, Llangynog, Carmarthen

T. Richard Jones Ltd, Betws Industrial Park, Foundry Road, Ammanford, SA18 2LS

Wesley Rees, Glyngwernen Quarry, Felinfoel, Llanelli

Ceredigion

CB Environmental Ltd, Rheidol Recycling Park, Glanyrafon Industrial Estate, Llanbadarn Fawr, Aberystwyth, Ceredigion SY23 3JQ

MD Recycling, Unit 1 Crugmor Farm, Penparc, Cardigan SA43 1QY

J D Evans & Sons Water Services, Penparc, Llanarth, Ceredigion SA47 0NR (NB recycling limited to waste arising from their Water Services business only).

Tregaron Trading Services, Abercoed Quarry, Tregaron, SY25 6UG

Monmouthshire

The Woodstock Waste Disposal Unit 7B, Castle Way Severn Bridge Industrial Estate
Portskewett Caldicot NP26 5PR

United Recycled Aggregates, Waterways House, Merthyr Road, Llanfoist, Abergavenny, NP7 9PE

Neath Port Talbot

Glass Tech Recycling, Unit 10, Tank Farm Road, Llandarcy, Neath, SA10 6EN

Cuddy Group, Francis House, Tank Farm Road, Llandarcy, Neath, SA10 6EN

Derwen Aggregates, Neath Abbey Wharf, Neath Abbey, Neath Port Talbot, SA10 6BL

Newport

GD Environmental Services Ltd, 19 East Bank Road, Felnex Industrial Estate, Newport, NP19 4PP

Pembrokeshire

Hughes & John, New Croft Garage, Cresselly, Kilgetty, Pembrokeshire, SA68 0TU

Lawrence Brothers, Lawrence Landfill, Pope Hill, Johnston, Haverfordwest

TBS Skips, Plot 10, Waterston Industrial Estate, Milford Haven, Pembrokeshire

RCT

Greens Recycling, The Business Centre, Unit 28, Pontcynon Industrial Estate, Abercynon, CF45 4EP

Lafarge Tarmac Ltd, Hendy Quarry, School Rd, Miskin, CF72 8PG

Tom Prichard Contracting Ltd, Castellau Fach Farm, Llantrisant, CF72 8LP

LCC Wales Ltd, Unit R, Hirwaun Industrial Estate, Rhigos, Aberdare CF44 9UP

Swansea

Stenor Environmental Services, Burrows Road, Kings Dock, Swansea, SA1 8QT

Torfaen

Recycled Stone & Soils Ltd, Little Mill Brickworks, Mamhilad, Pontypool

Vale of Glamorgan

Green Circle Concrete & Aggregates, Unit 10, Ty-Verlon Industrial Estate, Cardiff Road, Barry, CF63 2BE

Green Circle Concrete & Aggregates, Langcross Farm, Pen-y-Turnpike Road, Dinas Powys, Cardiff, CF64 4HG

Green Circle Concrete & Aggregates, Longlands Quarry, Corntown, Bridgend, CF36 5BA

APPENDIX E

SWRAWP PUBLICATIONS

SWRAWP Annual Report 2004
SWRAWP Annual Report 2005
SWRAWP Annual Report 2006
SWRAWP Annual Report 2007
SWRAWP Annual Report 2008
Final RTS October 2008
SWRAWP Annual Report 2009
SWRAWP Annual Report 2010
SWRAWP Annual Report 2011
SWRAWP Annual Report 2012
SWRAWP Annual Report 2013
RTS - First Review August 2014
SWRAWP Annual Report 2014
SWRAWP Annual Report 2015
SWRAWP Annual Report 2016
SWRAWP Annual Report 2017
SWRAWP Annual Report 2018
SWRAWP Annual Report 2019
RTS – Second Review September 2020
SWRAWP Annual Report 2020
SWRAWP Annual Report 2021
SWRAWP Annual Report 2022
SWRAWP Annual Report 2023