South East England Aggregates Working Party (SEEAWP)

Annual Report 2024

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SEEAWP Webpage

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Contents

Acronyms *- also see Glossary*

AR	Annual Report
APR	Aggregates Provision Rate
AWP	Aggregate Working Party
BAA	British Aggregates Association
BGS	British Geological Survey
BMAPA	British Marine Aggregate Producers Association
CDEW	Construction, Demolition and Excavation Waste
CE	Crown Estate
DPD	Development Plan Document
DLUHC	Department for Levelling Up, Housing and Communities
EA	Environment Agency
LAA	Local Aggregates Assessment
MDA	Marine Dredged Aggregate
MMO	Marine Management Organisation
MP	Minerals Plan
MHCLG	Ministry of Housing, Communities and Local Government
MPA	Mineral Products Association
MPAs	Mineral planning authorities (in plural to distinguish from the MPA)
NPPF	National Planning Policy Framework
PPG	Planning Practice Guidance
SE or SEE	South East or South East England region
SEEAWP	South East England Aggregates Working Party
SoCG	Statement of Common Ground
SS	Soft sand (also known as building sand)
SSG	Sharp sand and gravel
WDI	Waste Data Interrogator
UDP	Unitary Development Plan

Glossary *- also see Acronyms*

Aggregates Guidelines (the Guidelines)	'The national and regional guidelines for aggregates provision in England and Wales 2005 to 2020' provide an indication of the total amount of aggregate provision that the mineral planning authorities, collectively within each Aggregate Working Party, should aim to provide. The guidelines are no longer current and revised guidelines are due.
Aggregates Provision Rate (APR)	The planned level of aggregate (sand, gravel, and/or crushed rock) provision to ensure an adequate and steady supply of aggregates is maintained, to meet anticipated needs of the construction industry and growth for the next year. The APR is detailed within a mineral planning authority's Local Aggregate Assessment and is based upon both the rolling average of 10-years sales data and other relevant local information. The APR is also known as the LAA Rate.
Aggregate Resources	Minerals that may be available for use as an aggregate, including resources that may not be practicable to extract
Construction Demolition and Excavation (CDE) Wastes	Wastes arising from construction activity, comprising soils, substrate material, concrete, bricks, rubble, timber, glass etc. Only some of this waste stream is suitable for recycling as an aggregate.
Development Plan Document (DPD)	Development Plan Documents are planning policy documents which make up the statutory development plan. Core strategies and site-specific allocations are DPDs.
Duty to Cooperate (DtC)	Strategic policy-making authorities are required to cooperate with each other, and other bodies, when preparing, or supporting the preparation of policies which address strategic matters. This includes those policies contained in local plans (including minerals and waste plans), spatial development strategies, and marine plans. (NPPF – para. 24 subject to change in emerging revised NPPF as a requirement)
Landbank	The tonnage of all permitted reserves for which valid planning permissions are extant, divided by the annual rate of future demand or APR found in the latest annual Local Aggregate Assessment. (ref. PPG – Minerals para. 83) The landbank is usually expressed as years of life and SEEAWP's practice is to round the calculation to the nearest whole year.
Local Aggregates Assessment (LAA)	An annual assessment of the demand for and supply of aggregates in a mineral planning authority's area. The LAA should 'forecast future demand based on a rolling average of 10 years' sales data and other relevant local information' and an assessment of all supply options (including marine dredged, secondary and recycled sources) (NPPF 213a).

Managed Aggregate Supply System (MASS)	MASS seeks to ensure a steady and adequate supply of aggregate mineral, to handle the significant geographical imbalances in the occurrence of suitable natural aggregate resources, and the areas where they are most needed. It requires mineral planning authorities to make an appropriate contribution to national as well as local supply. It also ensures that areas with smaller amounts of aggregate make some contribution towards meeting local and national need, where that can be done sustainably.
Marine dredged aggregates (MDA)	Off shore sand and gravel dredged and landed at a wharf for use as an aggregate (excludes dredged material used for beach replenishment)
Mineral Consultation Area (MCA)	An area that includes part or all of an MSA that has been notified to a local planning authority by MPAs for consultation on specified non-mineral development proposals. (NPPF-216c). Some MCAs relate to aggregate infrastructure facilities – such as rail depots – that are unrelated to a MSA
Mineral Safeguarding Area (MSA)	An area of known 'of specific minerals resources of local and national importance' that should not be sterilised by non-mineral development where this should be avoided'. (NPPF-216c)
Primary aggregate	Aggregate produced from naturally occurring mineral deposits, extracted specifically for use as aggregate and used for the first time. Often produced from hard rock formations or from naturally occurring particulate deposits such as sand and gravel.
Recycled aggregate	Aggregate derived from processing e.g. sorting, screening, crushing, washing inorganic material used in construction e.g. construction and demolition waste. Excavation waste at construction sites after screening/washing out organic material e.g. soil is suitable as a recycled aggregate. Likewise spent railway ballast is included.
Secondary aggregate	Aggregate obtained as a by-product of other mineral operations, such as china clay waste, or as a by-product of other industrial processes, such as incinerator ash.
Statement of Common Ground (SoCG)	A statement of common ground is a written record of the progress made by strategic policy-making authorities during the process of planning for strategic cross-boundary matters. For minerals plans, aggregate working parties are also expected to be treated as additional signatories in statements of common ground.
Waste Data Interrogator (WDI)	A public Environment Agency data base comprising details on waste handled at sites licensed with an Environment Permit. Recycling plant on temporary construction and demolition is licensed by local authorities and are not included in the WDI.

Executive Summary

- Sales of all primary aggregates in 2024 were 13 Mt. The sales trend, 2015 – 2024, is quite static.

- Land won sand and gravel sales, display a declining trends although that for marine dredged aggregates (MDA) is steadier and is the dominant local aggregate supply.

- Land won aggregate reserves are being depleted and the land bank for sand and gravel stands at 8.5 years, just above the NPPF requirement. The crushed rock land bank is less than the NPPF requirement of 10 years. In contrast offshore reserves of MDA are significant with 22 years life, although there is a decline since 2023.

- Crushed rock imports in 2023 were 8.8 Mt, a two-thirds increase on 2019. This is a dominant feature of the aggregates situation in the South East. Over half of this is supplied from the South West with almost 80% of it delivered by rail. Negligible imports to the South East in 2023 were by water which maybe an aberration in the presentation of data as Scotland contributed 1.6 Mt that is likely sourced from a major coastal quarry. Moreover, SEEAWP Aggregate Monitoring (AM) 2024 data for crushed rock sales at wharves were 2.8 Mt.

- In contrast to crushed rock, imports and exports of sand and gravel (land won and MDA) roughly balance. However, the trend is towards the South East being a net importer.

- Owing to the change in aggregates imports, consumption of aggregates in the South East in 2023 was 22.7 Mt. This has meant the South East's aggregate sales to consumption ratio has dropped from 74% in 2019 to 63% in 2023.

- Infrastructure capacity is available to handle growth in imports and MDA. The LAAs note the importance of the Medway wharves and implied evidence for the development of a further crushed rock terminal for bulk carriers.

- Secondary aggregate sales were in 2024 increasing but they play only a small role in aggregates supply. Recycled aggregate sales in 2024 were under 4 Mt and displayed a declining trend. No constraints on capacity have been reported but output could always be limited by the availability of feedstock.

- Industry forecasts indicate short term growth in aggregates demand and major projects in the pipeline suggest this may continue. There are also longer term UK growth scenarios for aggregates. However, it is a challenge to estimate amounts of aggregate the South East may need with any precision. On the other hand, there are several major construction projects that suggest the recent increase in crushed rock imports and consumption could continue.

- Evidence from the submitted LAAs show that some MPAs have landbanks below the NPPF requirement. This effectively places more demand on the land won reserves of Hampshire, Oxfordshire and Surrey and the supply from

alternatives sources, particularly imports. The LAAs are not always clear if these the sources within the South East and elsewhere have long term sufficient resources to meet the South East's needs.

The variations in the local pattern of aggregate supply reinforce the point that MPAs must have up to date minerals plans kept under continual review by their MPAs to demonstrate that there is a steady and adequate supply of aggregate.

Finally, without Aggregate Guidelines it is unclear whether SEEAWP can make a full judgement on whether the South East is making a full contribution to aggregate needs. Nevertheless, evidence from AM 2024 surveys and the LAAs submitted by MPAs the South East overall is making a full contribution to aggregate supply in the national context in that the regional sand and gravel land bank is above the NPPF requirement and there is adequate capacity to accommodate marine dredged aggregates and imported crushed rock.

However, some LAAs are unclear whether a full local contribution is being made. Landbanks maybe under NPPF requirement and there is insufficient explanation how further reserves can be realised from contributions from undetermined applications, outstanding allocations or potential for developing aggregate resources. Moreover, there are cases where alternative aggregates sources from neighbouring MPAs and those outside the South East are not fully substantiated by Statements of Common Ground or Duty to Cooperate information

The following table is a Dashboard illustrating key aggregates metrics for the South East

South East Aggregates Dashboard

Aggregate	Sales 2024	Sales average 2015 - 2024	Sales trend 2015 - 2024	Reserves end of 2024	Reserves trend 2015 - 2024	Landbank (years)	Landbank trend 2015 -2024[1]
Land Won Sand and Gravel	4,699	5,801	↓	51,306	↓	8.5	↓
Land Won Crushed Rock	c	2,214	↑	c	↓	6	↓
Marine dredged aggregates	5,992	6,493	↓	386,120	↑	22	↑
Total Primary Aggregates	c	14,373	↔				
Secondary Aggregates	475	409	↑				
Recycled Aggregates	3,572	4,097	↓				

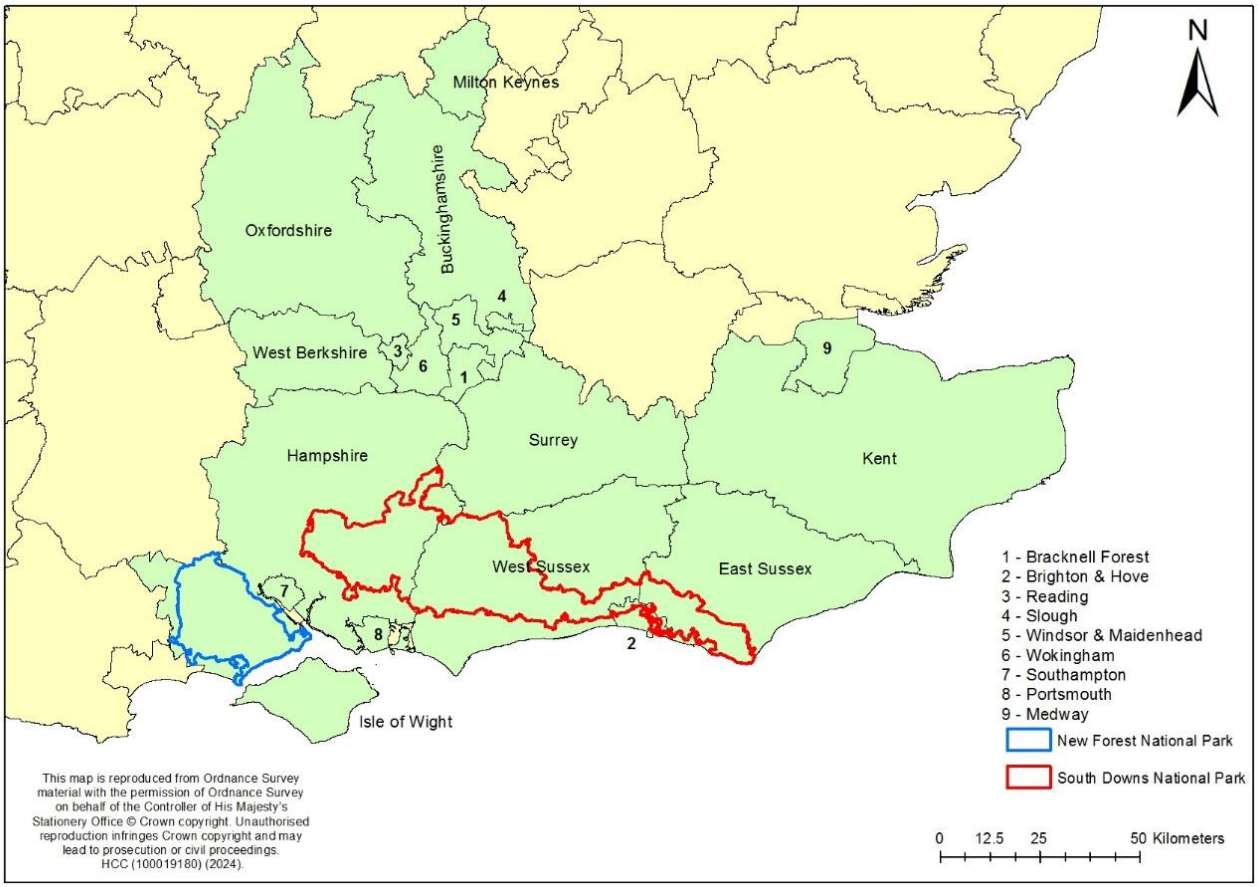
N.B. Tonnage figures in thousand tonnes

[1] 2018-2024 for marine dredged aggregate

Introduction

The South East England Aggregates Working Party (SEEAWP)[2] (Fig1, Appendix 1) is one of several Aggregate Working Parties (AWPs) that cover England and Wales and responsible for monitoring aggregates and advising Government, mineral planning authorities and, others accordingly. All AWPs regularly publish Annual Reports, which are submitted to the Government MHCLG or Welsh Government as appropriate.

Figure 1: South East (SEEAWP) Mineral Planning Authorities



The Annual Report reports on data from; the annual Aggregate Monitoring Surveys (AMS), information provided by mineral planning authorities (MPAs) and, other organisations notably the Crown Estate. The latest four-yearly national survey, AMS 2023, is being nationally collated by the British Geological Survey (BGS) and not all the information has been fully processed. The outstanding data will be reported in AM 2024, next year's Annual Report.

The report explains the overall regional aggregates position supported by various maps, diagrams and graphs figures. The latter part of the report covers the MPAs' Local Aggregate Assessments (LAAs) that collate and comment on sub-regional aggregates data.

[2] The SEEAWP membership, role and meeting schedule is in Appendix 1.

The report is accompanied by separate Tables and Appendices[3] in an Excel format that include regional and sub-regional aggregates data in the South East.

The Annual Report concludes whether in SEEAWP's view the South East 'is making a full contribution towards meeting both national and local aggregate needs' as required by the Planning Practice Guidance (PPG)[4].

Primary Aggregates

Primary aggregates are naturally occurring minerals not hitherto extracted. They are a broad category of coarse to fine-grained particulate material used in construction and are a critical element for the delivery of buildings and infrastructure. In the South East they are currently sourced from:

- 'superficial' geological deposits laid down during the glacial periods and often called 'valley' and 'plateau' gravels. They are usually referred to as 'sharp sand and gravel' and are particularly used in the manufacture of concrete.
- 'solid' deposits laid down in the Cretaceous period with the Folkestone Formation being the most widely spread (Kent, Surrey, West Sussex, Hampshire and parts of Oxfordshire). These aggregates are usually referred to as 'soft sand' or building sand and used for mortars, asphalt, and plaster.
- less widely distributed outcrops of 'solid geology' principally found in Kent (Cretaceous 'ragstone', a form of limestone mainly used for fill), Oxfordshire (limestone and ironstone of Jurassic origin) and the Isle of Wight.
- finally chalk, a ubiquitous resource, has been used as an aggregate, but now mainly used in agriculture

A further source of primary aggregates are marine dredged aggregates (MDA), sourced offshore and sold at various wharves in the South East.

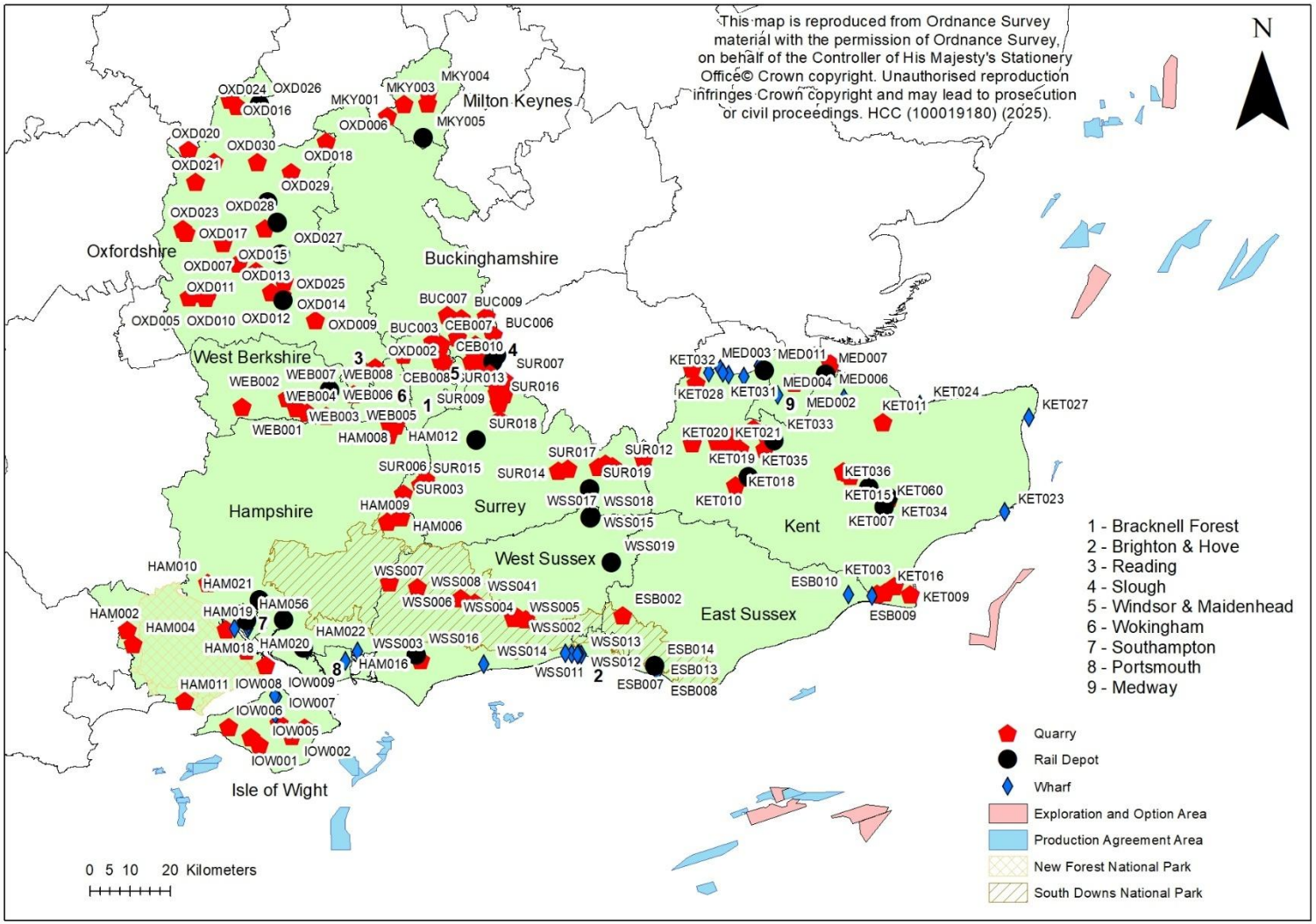
Finally, there are imports from other regions/nations outside England and Wales. The most important are crushed rock, sold at some wharves and rail depots, principally brought into the South East by rail or sea.

The location of the various aggregate sites within the South East are illustrated in Figure 2 below. More information can be found in Appendix 2 while the SEEAWP web site will includes a digital map of the sites in due course.

[3] Data is consolidated in some of tables in the Annual Report to preserve commercial confidentiality: Central and Eastern Berkshire (**CEB**) includes all the Berkshire unitary authorities except West Berkshire and Slough; **East Sussex** includes Brighton and Hove and part of the South Downs NPA; **Hampshire** includes Portsmouth, Southampton, New Forest NPA and part of the South Downs NPA; **West Sussex** includes part of the South Downs NPA. Slough has no land won or marine dredged aggregate (MDA) sales.

[4] PPG para 073

Figure 2: South East Aggregate Sites and Offshore Marine 'Dredging Regions' - 2024



Source: Appendix 2

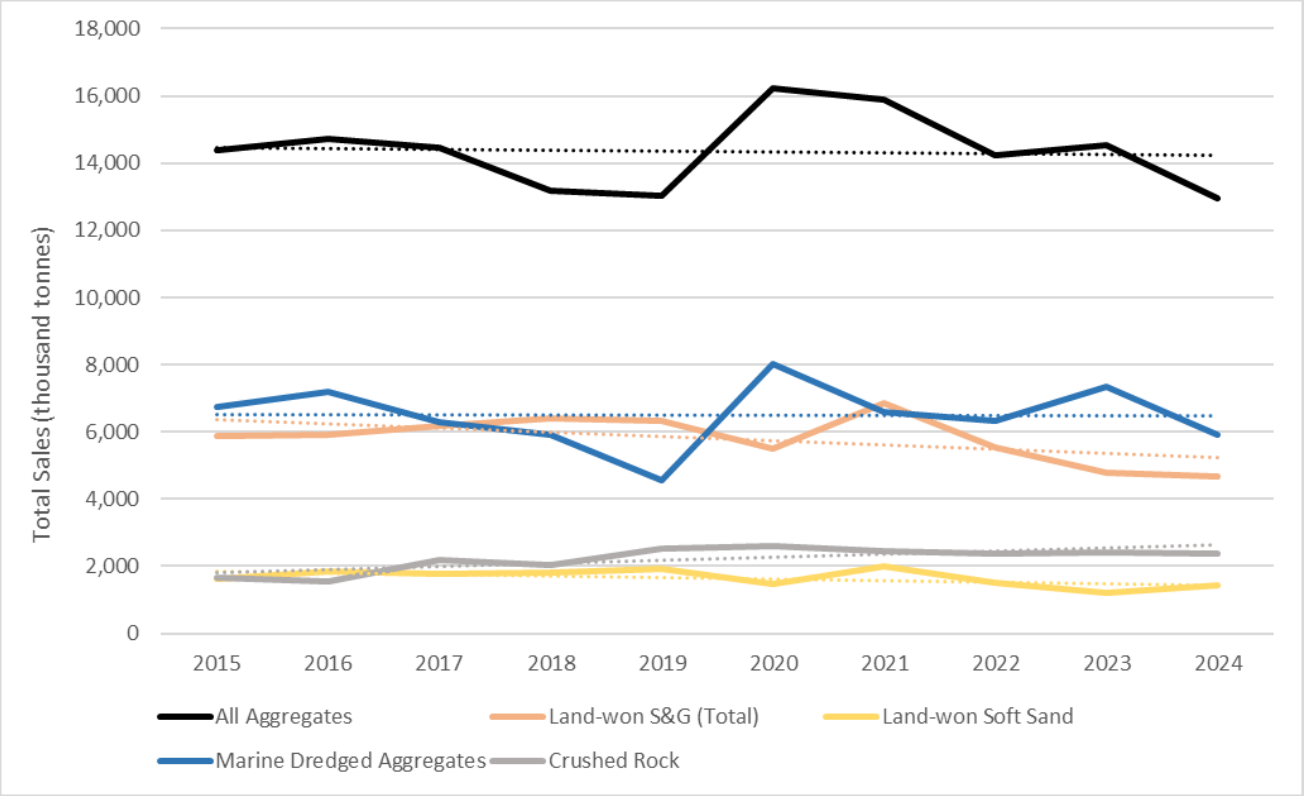
Sales of Primary Aggregates

In 2024, the South East primary aggregate (land won and marine dredged aggregates (MDA)) sales (Fig 3) were 13 Mt. This was lower than the 2023 sales and reflects the trend of the last three years. Over the last decade overall aggregate sales have been around 14 Mt and display a static trend.

Total land won sand and gravel and soft sand both show declining trends whilst that of MDA is steady at just over 6 Mt. On the other hand, crushed rock sales exhibit a strong increasing trend over the past 10-years while being steady over the past 3-years.

Of note is that MDA sales at 5.9 Mt in 2024 are still the dominant aggregate type, despite a decline of over 1 Mt since 2023.

Figure 3: South East Primary Aggregate Sales (2015 – 2024)



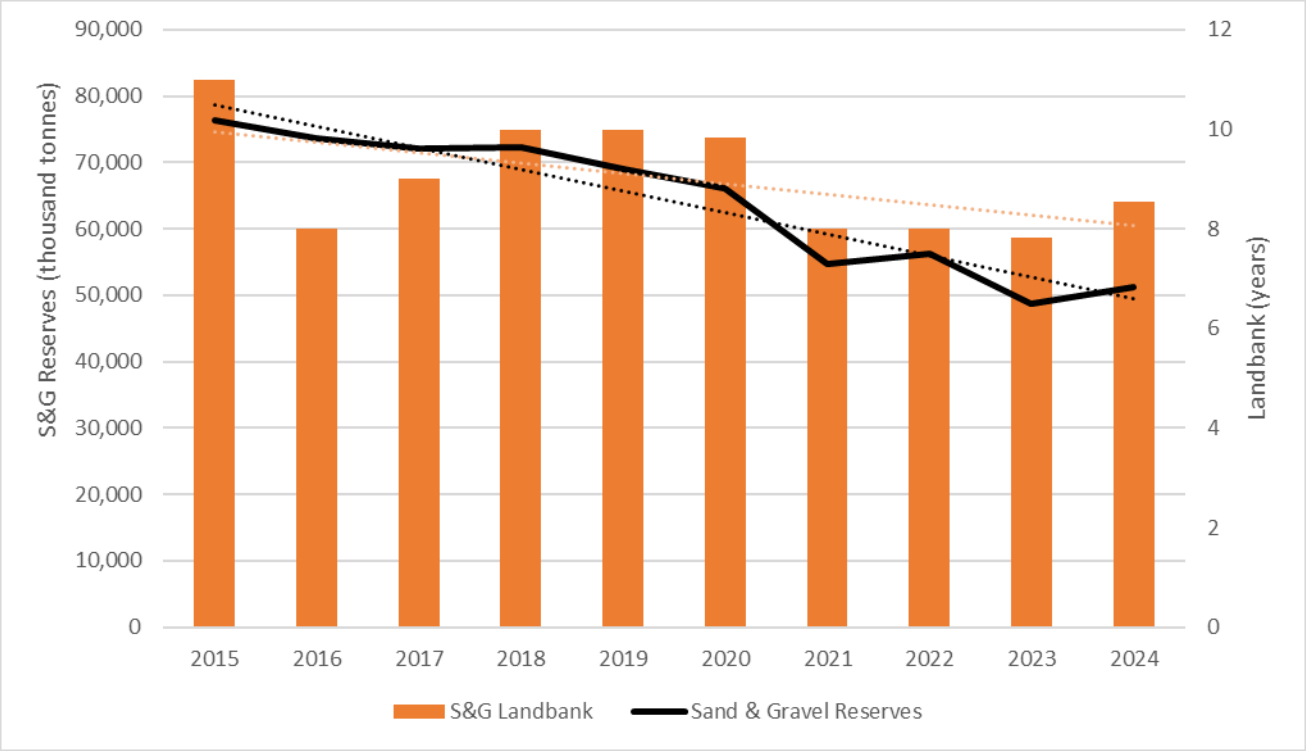
Source: Table 2, Appendix 4
Note: Sales of imports including those from wharves and rail depots are excluded

Primary Aggregate Reserves and Landbanks

Land won sand and gravel aggregate reserves (Fig 4) display a steady declining trend over the last decade from 76.4 Mt in 2015 to 51.3 Mt in 2024. By way of contrast the sand and gravel landbank has remained fairly steady at about 8.5 years. Although within this the soft sand landbank is 10 years and that for sharp sand and gravel 7 years.

On the other hand, the land reserves and land bank for crushed rock have declined and the land bank is 6 years (9 in 2023).

Figure 4: South East Sand and Gravel Reserves & Landbanks (2015-2024)

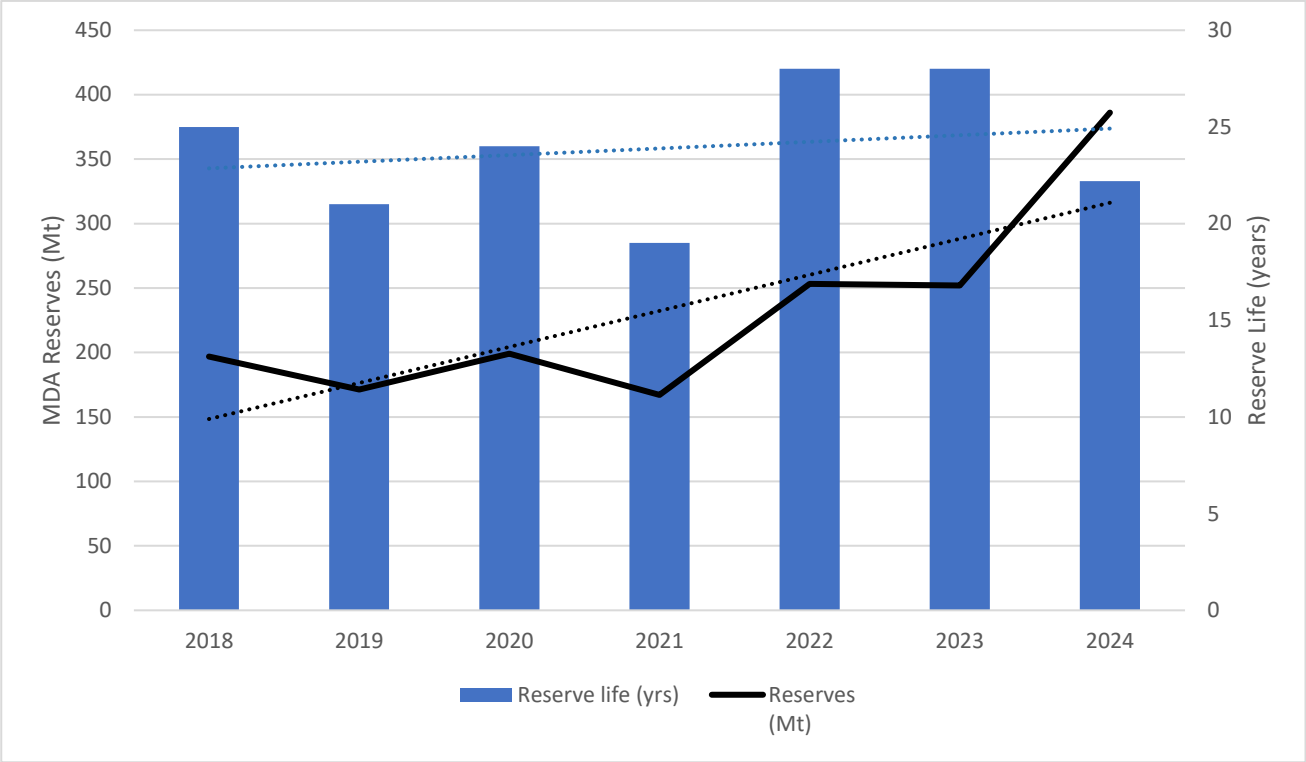


Source: Tables 3 and 4; Appendix 4

The pattern of offshore MDA reserves and 'landbank' data are very different. The Crown Estate dredging regions of Thames Estuary, East English, and South Coast provide virtually all the MDA landed at South East wharves. The regions together in 2024 have 386 Mt of reserves which were more than the 2023 estimate of 252Mt. However, the reserves life has declined to 22 years. This appears to have been caused by an increase in the 10-year average annual offtake of minerals as reported by the Crown Estate[5].

[5] Crown Estate Annual Summary Statistics (2025) - https://www.datocms-assets.com/136653/1746700986-mineral-summary-statistics-2025.pdf

Figure 5: South East Offshore MDA Reserves – (2018 – 2024)



Source: Crown Estate Marine: Aggregates - 2018-2024; Appendix 7

Aggregate Exports, Imports and Consumption

The South-East aggregate imports and exports (Fig. 6) refer to aggregate movements into and out of the region to/from other English regions and Wales. Aggregates from Scotland, Ireland and remainder of Europe are also regarded as imports.

Imports and exports of sand and gravel (land won and MDA) for the South East with other regions and nations were broadly in balance although this contrasts with 2014 and 2019 when there was a positive balance i.e. more exports than imports. A trend that suggests the South East could become a net importer of sand and gravel in due course.

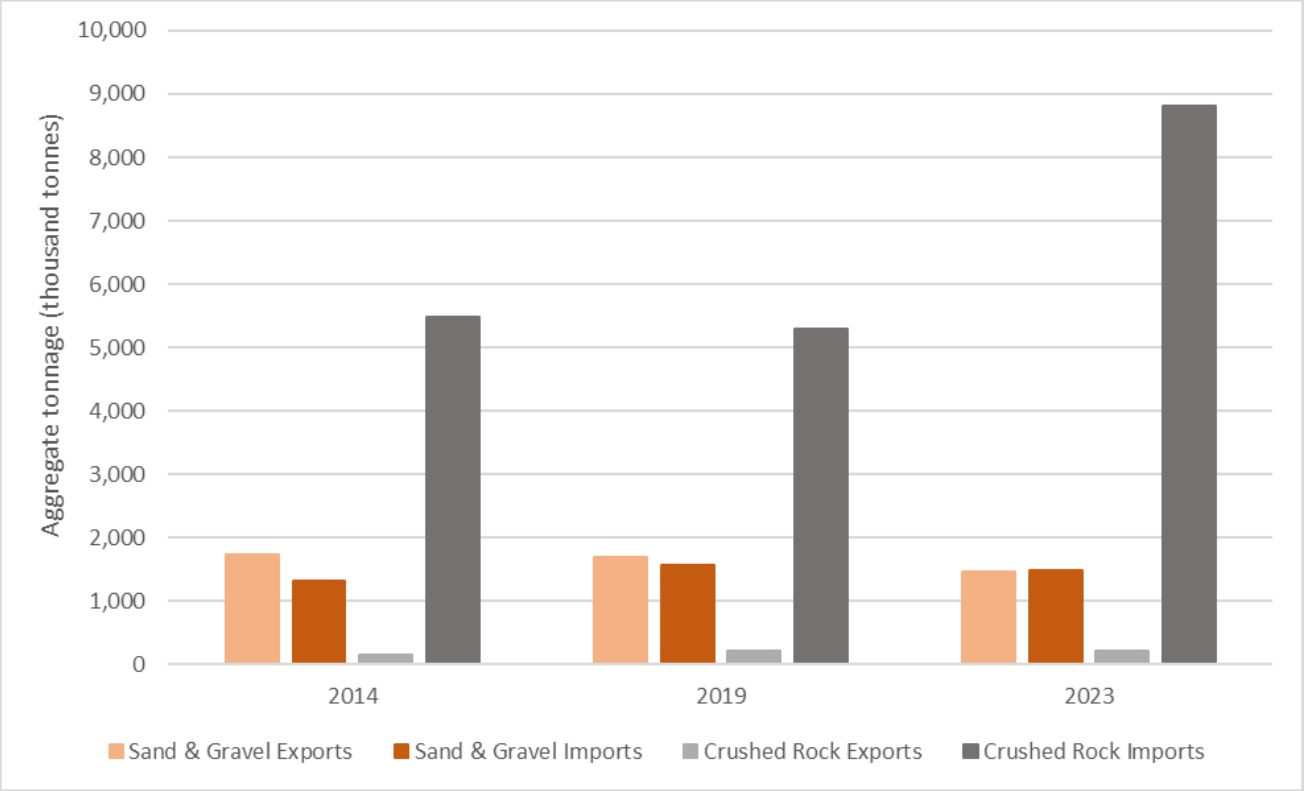
The South East has consistently been a major net importer of crushed rock. Since 2019, imports have increased to 8.8 Mt, a two-thirds increase. The major source of crushed rock imports are the South West (Somerset) - 4.6 Mt; outside England and Wales – 2.1 Mt of which Scotland contributed 1.6 Mt and; East Midlands (Leicestershire) – 1.6 Mt. Sales from all sources have increased, but the South West the most with over an 80% increase. The overall balance of aggregate imports and exports indicates that the South East is even more dependent on imported crushed rock than hitherto.

Regarding the mode of transport of crushed rock[6] imports to the South East, 57% were by rail in 2023 as opposed to 40% in 2019. However, in 2023 almost 80% of crushed rock imports from the South West were by rail, which compares with 60% in 2019. Negligible crushed rock imports are recorded via water, which appears anomalous given 1.6 Mt of

[6] The BGS has shared data on the mode of transport of aggregates imported to the South East for both AM 2019 and 2023. The is not published as some of it discloses company sales.

crushed rock in 2023 was sourced from Scotland (see above paragraph) and would likely be landed in the Kent/Medway ports.

Figure 6: South East Aggregate Exports and Imports – (2014 – 2023)



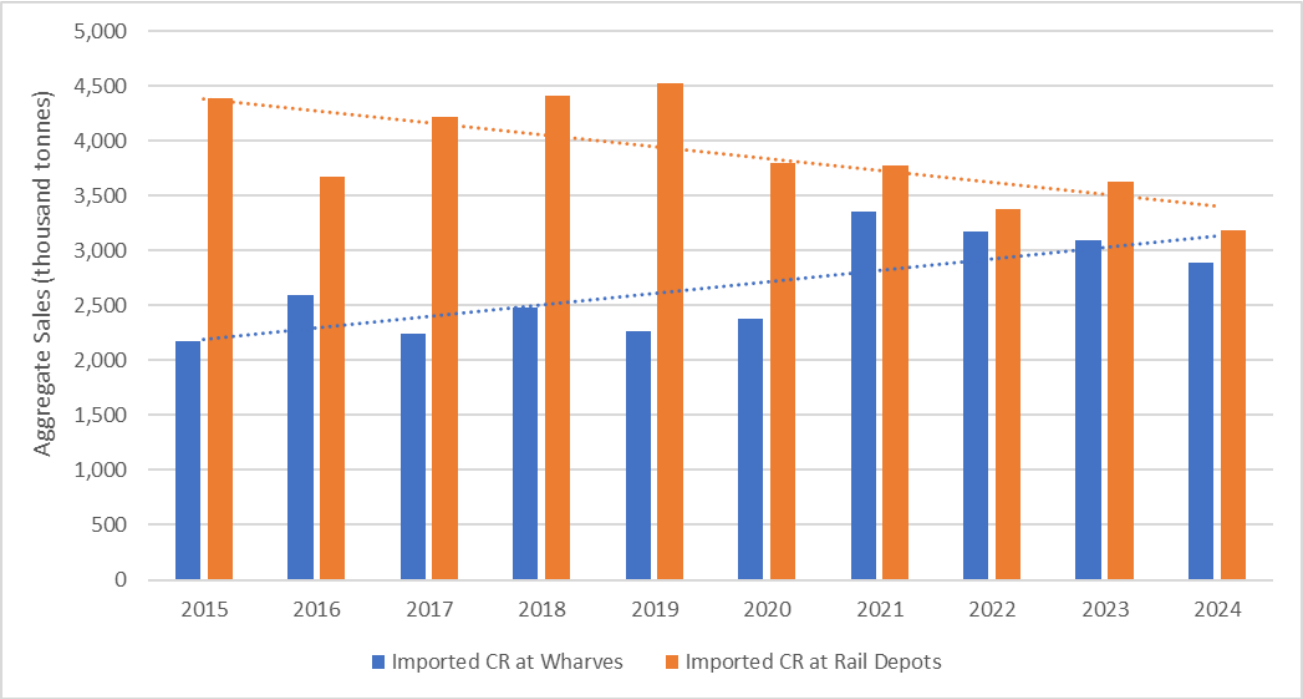
Source: AM (Collations) 2014-2023 Table 3

More detailed time series information on crushed rock imports is available from the SEEAWP surveys of aggregates sales at the South East wharves and rail depots[7] (Figure 7). Although the rail depots import land won sand and gravel and MDA, the bulk of sales are crushed rock. In 2024, rail depot sales of imported crushed rock were over 3 Mt, but nearly 0.5 Mt lower than 2023, which reflects a recent declining trend since 2019. Wharf sales of imported crushed rock in 2024 were 2.8 Mt which since 2021, which was a sales high during the last decade, also show a declining trend.

It should be noted that data from the SEEAWP surveys of crushed rock sales at wharves and rail depots (6.6 Mt) is not readily reconciled with the 8.8 Mt reported in Figure 6.

[7] SEEAWP in undertaking a review of survey methodology for crushed rock sales at rail depots and wharves to reconcile this information with that collated by the BGS for the AM 2019 and 2023 surveys.

Figure 7: South East Imported Crushed Rock Sales at Wharves/Rail Depots (2015 – 2024)



Source: Appendices 5 & 6

The South East consumption of aggregates had changed in a similar manner to the import picture. According to Table 2b in the National Collation for AMSs, in 2014 total aggregate consumption was 19.2 Mt, this declined a little in 2019, but by 2023 it had grown to 22.7 Mt.

The main component in this growth is the consumption of crushed rock, which in 2023 was 10.9 Mt. Though this was lower than sand and gravel at 11.8 Mt, crushed rock consumption grew from 7.1 Mt in 2014/2019, while sand and gravel consumption had remained quite static in the 11 Mt to 12 Mt range during the same period. The effect is that crushed rock consumption had become a much more important element and has led to the overall South East sales to consumption ratio falling from 74% (2014) to 63% in 2023.

Infrastructure Capacity

Imported and marine dredged aggregates are important elements of supply to the South East. Aggregate rail depot and wharf capacities are, therefore, important to continuing aggregate supply. However, data on this is variable and cannot be fully relied upon. However, best estimates (Table 5) show unused capacity for wharves and rail depots is about 50%. This suggests there is sufficient capacity to meet overall foreseeable growth in the South East. It is noted that Medway (Isle of Grain) has the main capacity in the South East to accommodate crushed rock bulk carriers. This capacity is eccentrically located for much of the South East and elsewhere. Options for additional capacity of this type are limited to Southampton Water (Hampshire).

Secondary and Recycled Aggregates

The NPPF places significant emphasis on secondary and recycled aggregates as a major contributor to aggregates supply.

The MPA[8] estimate that about 30% of all UK aggregates in 2022 are from these sources. This, the aggregate industry advise, might be the limit that secondary and recycled aggregate can contribute to total aggregate supply. Rates of development, especially re-development, limits the feed stock, secondary aggregate sources are often not well placed for the market and there are limitations in the quality of the product. The secondary and recycled aggregate contribution to the South East's aggregate sales (excluding imports) is 22%.

There are numerous recycled aggregate sites in the South East but many fewer secondary aggregate sites. The distribution of both types of sites is illustrated below in Figure 8. More information is included in the site list in Appendix 3, and a digital map is planned for the SEEAWP website in due course.

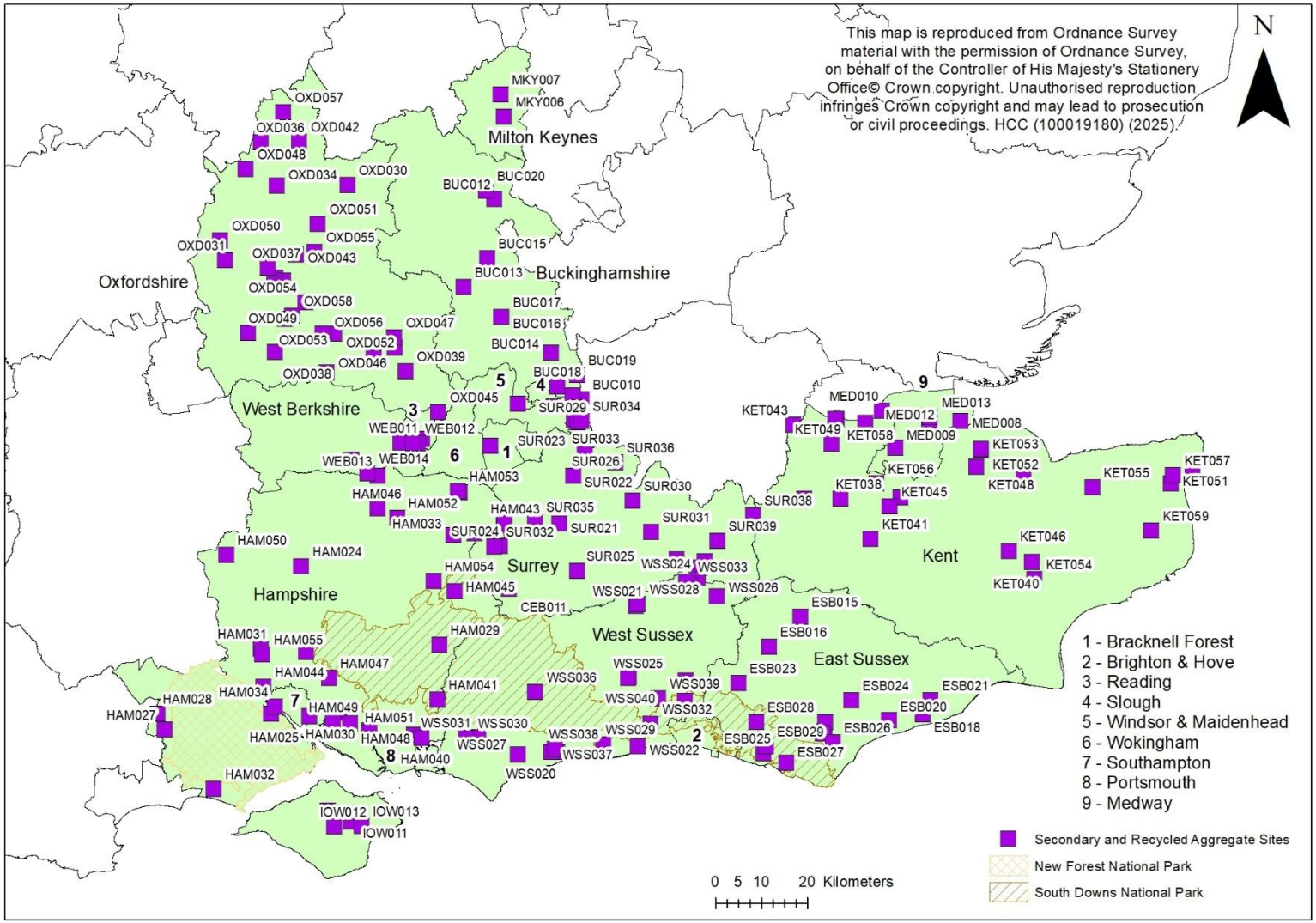
In 2024, approximately 0.4 Mt of secondary aggregate was produced in the South East, which was less than 10% of the recycled aggregate total. The South East does not have the industrial and mineral heritage to source secondary aggregates and a significant proportion of that produced arose from incinerator bottom ash at energy from waste plants.

About 3 Mt of recycled aggregate was produced in 2024, which is at least half million tonnes less than that in 2023. Over the previous decade there has been a distinct declining trend in production, as shown in Figure 9.

Evidence on the capacity of secondary and recycled sites is sparse. Judging by the number of sites and wide distribution there is unlikely to be a capacity limit on growth.

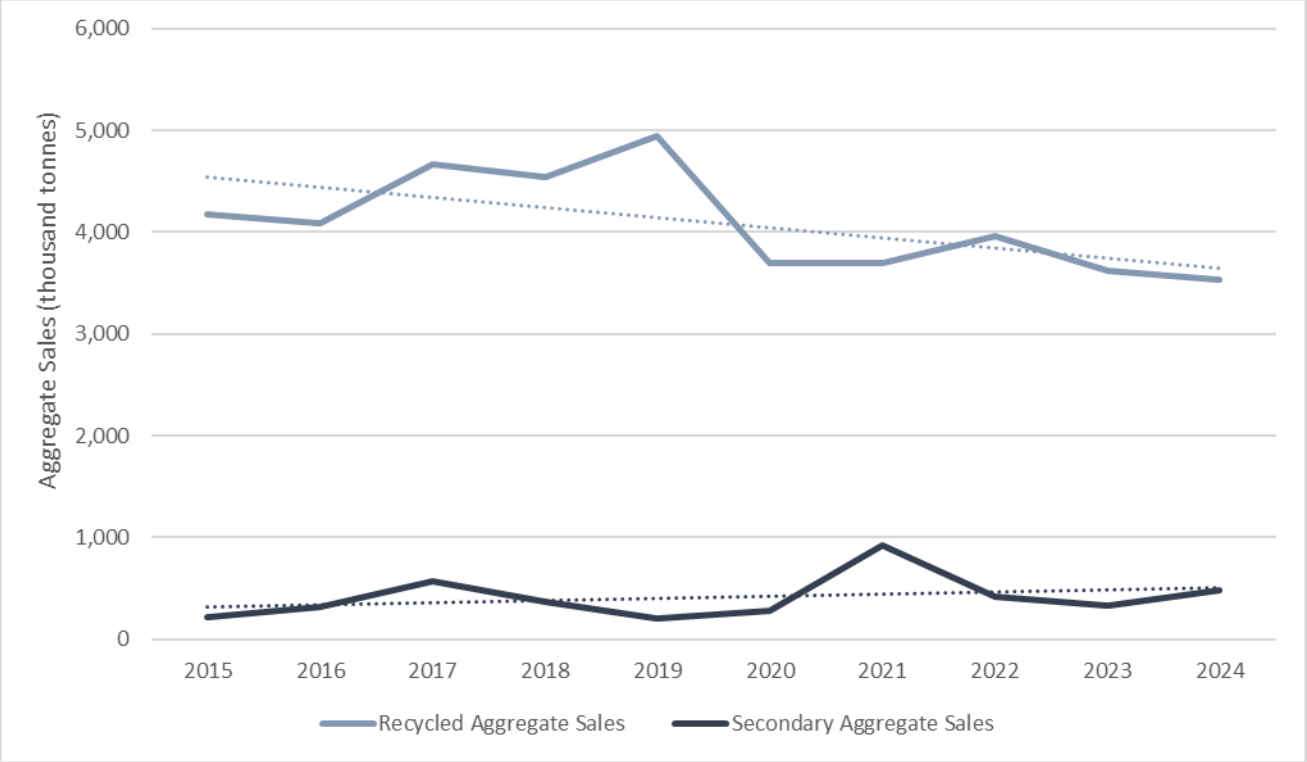
[8] Mineral Products Association (2024): 'Construction Aggregates Supply in Great Britain: Primary, Recycled and Secondary Aggregates in 2022'

Figure 8: Location of secondary and recycled aggregate sites in 2024



Source: Appendix 3

Figure 9: Recycled and Secondary Aggregate Sales in the South East (2015 – 2024)



Source: Tables 6a,6b

Trends and Analysis

- Sales of primary aggregates overall display a flattish trend, although land won sand and gravel show a declining sales trend. Since 2014, MDA sales have become the more important element of aggregate sales in the South East.

- Imported aggregates sales are dominated by crushed rock, as illustrated by the AM 2023 collation, and are a more important element of aggregate supply, which has led to a change in the consumption pattern. Since 2019, an increase in crushed rock from the South West is very noticeable and MPAs have reported that this has been caused by the demands of HS2.

- Although the sand and gravel land bank has increased, reserves are being slowly depleted with a clear downward declining trend. The crushed rock land bank is less than the NPPF requirement of 10 years. Off shore reserves of MDA are significant, although the estimated reserve life has declined to less than 25 years.

- There is infrastructure capacity overall in the South East to accommodate growth in imports and MDA. However, it is noted that capacity for importing crushed rock by sea is concentrated in Medway and Kent

- Secondary aggregate sales have increased although they are a minor supply feature. Recycled aggregates continue to display a downwards sales trend. No constraints on capacity have been reported.

Aggregate Demand

In the past AWPs relied on the 'Aggregate Guidelines' to provide a 'demand' framework for the provision of aggregates at regional and local level. While updated Guidelines are under preparation SEEAWP relies on other information.

The Mineral Products Association publish short term (2024 -2028) forecasts[9] that suggest about a 2.7% per annum growth in construction in the South East. Alongside this some growth scenarios[10] have also been published. These suggest an aggregates demand 'not seen since the 1980s'. Moreover, the Government has committed itself to further infrastructure development and increasing the rate of housing growth by 50% on recent years.

Major Construction Projects

There are several major projects in the South East (Table 7) that could affect aggregates demand over the next 10 years or more to levels above 'business as usual'. Very few of the projects have assessed their aggregate needs, so it is a challenge to quantify the impacts. Some of the projects such as the airport expansions, and as HS2 has demonstrated, could affect aggregate provision over a wide area directly and indirectly.

Projects of note are:

- Heathrow[11] and Gatwick airports expansions,
- Rampion 2 Windfarm (East and West Sussex off shore),
- North Kent /Medway projects including the Lower Thames Crossing, Ebbsfleet Garden City, Project Cavendish Hydrogen Facility (Isle of Grain) and,
- Oxford – Cambridge Arc (including East-West Rail) Growth and other developments).

Mineral Plans

Most South East MPAs have mineral plans (Table 8) adopted in the last 5 years or else committed to preparing replacements. The plans include outstanding i.e. unpermitted allocations for sand and gravel tonnage of 14 Mt, which is equivalent to a two-year landbank. There are no outstanding allocations for crushed rock.

Planning Applications

South East MPAs have determined or are still considering 12 (plus another under appeal) planning applications for aggregates during 2024 (Table 9). The outstanding applications include nearly 4 Mt of sand and gravel although this represents less than 1 year sand and gravel landbank.

[9] Regional overview of construction and mineral products markets in Great Britain – Mineral Products Association 2024
[10] Aggregates demand and supply in Great Britain Scenarios for 2035 – Mineral Products Association 2022
[11] Documentation associated with the Heathrow Expansion indicate it would be more than self-sufficient for sand and gravel and a rail depot would be provided (to replace the existing in Slough) for importing crushed rock and other construction materials

Local Aggregates Assessments

A summary of the submitted LAAs 2024[12] (Table 10) synthesises the sub-regional AM data contained in the Tables and Appendices attached to the Annual Report 2023. The conclusions that can be drawn from the LAAs, are:

Aggregate Demand/Aggregate Provision Rates (APRs)

The Planning Practice Guidance (PPG) advises that LAA should 'forecast the demand for aggregates based on both the rolling average of 10-years sales data and other relevant local information'. SEEAWP refers to this as the provision to be made for extraction each year or as the Aggregates Provision Rate (APR). Many MPAs in the South East have chosen an APR for their LAAs that reflects their local circumstances and higher than average 10 year sales average as advised in the PPG. This effectively allows for a margin of aggregate sales growth.

Most MPAs in their LAAs do examine growth pressures by identifying major projects that could elevate demand beyond any trend based on business as usual scenario. However, it is recognised that there are difficulties in determining the impact of major projects on any MPAs reserves and infrastructure.

Landbank Shortfalls

There are several MPAs with apparent low land banks and these are illustrated in Figure 10. The spatial pattern is like that reported in last year's Annual Report and the following MPAs have landbanks below the 7-year requirement.

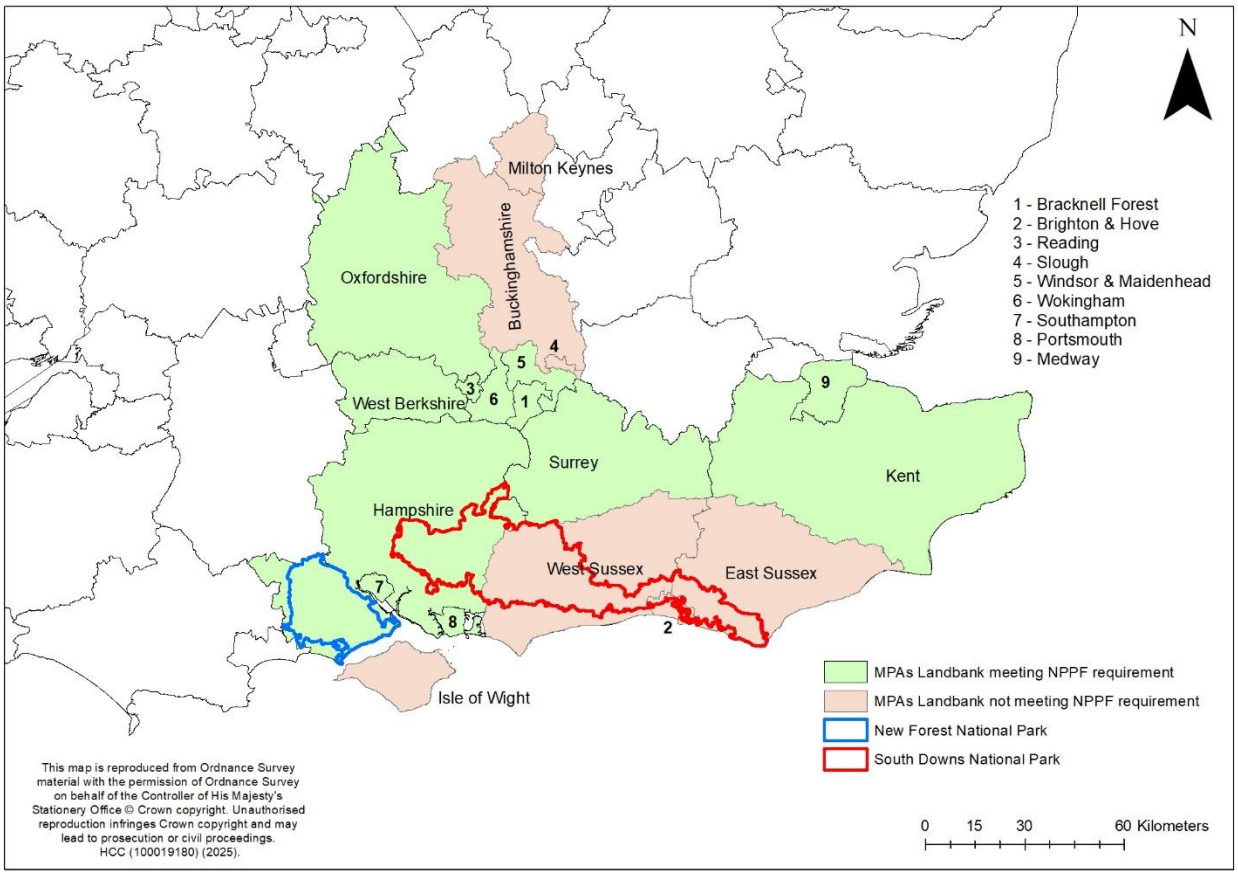
- Milton Keynes
- Buckinghamshire
- Isle of Wight
- West Sussex and,
- East Sussex

Last year's Annual Report noted (SEEAWP AR 2023 - Table 11) how some MPAs reserves are biased to soft sand which effectively compounds landbank shortfalls as this aggregate supplies a minor sector of the aggregates market. This affects Surrey and Kent particularly.

The LAAs address low land banks and medium-term supply issues by discussing potential aggregate supply either from additional land won resources or alternatives. However, the analysis in some of the LAAs is unclear as to how a shortage could be mitigated.

[12] No LAAs 2024 were submitted by East Sussex; Isle of Wight; Kent; Milton Keynes and; Slough and this means the LAA picture is incomplete.

Figure 10: Sand and Gravel Land Banks in the South East – 2024



Infrastructure Capacity

The LAAs, unlike previous years, report limitations to capacity that would limit expected growth. The Medway LAA notes the regional/inter-regional importance of its wharf capacity.

LAA Conclusions

- Some of the South East MPAs, as reported in previous Annual Reports, have aggregate land banks below the NPPF requirement. There are mitigating factors through plan allocations and undetermined applications, but it is not always clear how these could extend the land bank. The longer-term potential for further extraction is not always explained although some MPAs have remarked or implied that beyond the existing or emerging mineral plan periods opportunities are limited.

- In contrast to recent Annual Reports no infrastructure capacity issues have been reported. Indeed, additional capacity sidings at some rail depots have been installed in response to increased crushed rock imports.

- The importing of aggregate to address local land bank shortfalls is often reported although the longer-term implications are not clear. The capacity of neighbouring MPA or MPAs in other regions is sometimes not explained. It is however, noted that some LAAs refer to statements of common ground addressing this issue. It is noted

end dates for the Somerset quarries there is an issue of end dates for their permissions

- Given the general declining trend in secondary and recycled aggregates there is insufficient evidence given in LAAs on how far this supply source can be relied on.

- There are some MPAs without up-to-date mineral plans, but it is noted there are informed reports that opportunities for further sustainable land won reserves have ended.

- There is limited evidence to demonstrate that every MPA ‘is making a full contribution towards meeting …... local aggregate needs’.

Annual Report Summary and Conclusions

- Sales of all primary aggregates in 2024 were 13 Mt. The sales trend, 2015 – 2024, is quite static.

- Land won sand and gravel sales, display a declining trend although that for MDA is steadier and is the dominant local aggregate supply.

- Land won aggregate reserves are being depleted and the land bank for sand and gravel stands at 8.5 years, just above the NPPF requirement. The crushed rock land bank is less than the NPPF requirement of 10 years. In contrast offshore reserves of MDA are significant with 22 years life, although this is a decline since 2023.

- Crushed rock imports in 2023 were 8.8 Mt, a two-thirds increase on 2019. This is a dominant feature of the aggregates situation in the South East. Over half of this is supplied from the South West with almost 80% of it delivered by rail. Negligible imports to the South East in 2023 were by water which is anomalous given that Scotland contributed 1.6 Mt. Moreover, SEEAWP AM 2024 data for crushed rock sales at wharves were 2.8 Mt.

- In contrast to crushed rock, imports and exports of sand and gravel (land won and MDA) roughly balance. However, the trend is towards the South East being a net importer.

- Owing to the change in aggregates imports, consumption of aggregates in the South East in 2023 was 22.7 Mt. This has meant the South East's aggregate sales to consumption ratio has dropped from 74% in 2019 to 63%

- Infrastructure capacity is available to handle growth in imports and MDA. The LAAs note the importance of the Medway wharves and evidence for the development of a further crushed rock terminal for bulk carriers.

- Secondary aggregate sales were in 2024 increasing but they play only a small role in aggregates supply. Recycled aggregate sales in 2024 were under 4 Mt and displayed a declining trend. No constraints on capacity have been reported but output will always be limited by the availability of feedstock.

- Industry forecasts indicate short term growth in aggregates demand and major projects in the pipeline suggest this may continue. There are also longer-term UK growth scenarios for aggregates. However, it is a challenge to estimate amounts of aggregate the South East may need with precision. On the other hand, there are several major construction projects that suggest the recent increase in crushed rock imports and consumption could continue as long as end dates for quarries are extended and rail routes and depot capacity are maintained.

- Evidence from the submitted LAAs show that some MPAs have landbanks below the NPPF requirement. This effectively places more demand on the land won reserves of Hampshire, Oxfordshire and Surrey and the supply from alternatives sources. It is not always clear if these sources are secure.

- Finally, the variations in the local pattern of aggregate supply reinforce the point that MPAs must have up to date minerals plans kept under continual review by their LAAs to demonstrate that there is a steady and adequate supply of aggregate.

In the absence of Government aggregate guidelines for aggregate provision in the South East is challenged in determining if the South East is meeting national and local aggregate needs. However, there is evidence 'national' needs are being met but evidence at the local level is unclear.

It is apparent from the evidence the South East is facing some changes to its aggregates framework and planning decisions should be made accordingly.

- Although sand and gravel will continue to have a role it is more likely the emphasis will be on MDA and reserves and infrastructure need securing. In many areas MPAs are advising that there are no further options for sustainable local extraction.

- MDA will continue as the more important sand and gravel source so offshore reserves should be maintained and wharves safeguarded for landing and sales.

- Crushed rock imports are growing in importance and several major construction projects indicate the higher level of consumption recorded in 2023 could continue. Accordingly, import infrastructure needs to be safeguarded and developed. The later includes the planning for a further aggregate bulk carrier facility in Southampton Water. Furthermore, crushed rock reserves in regions and Nations outside the South East need to be identified and 'secured'.

- Although secondary and recycled aggregates have a role to play, they cannot be relied as being a dominant contributor to supply.

Finally, without Aggregate Guidelines it is unclear whether SEEAWP can make a full judgement on whether the South East is making a full contribution to aggregate needs. Nevertheless, evidence from AM 2024 surveys and the LAAs submitted by MPAs the South East overall is making a full contribution to aggregate supply in the national context in that the regional sand and gravel land bank is above the NPPF requirement and there is adequate capacity to accommodate marine dredged aggregates and imported crushed rock.

However, some LAAs are unclear whether a full local contribution is being made in. Landbanks may be under NPPF requirement and there are insufficient explanations how further reserves can be realised from contributions from undetermined applications, outstanding allocations or potential for developing aggregate resources. Moreover, there are cases where alternative aggregates sources from neighbouring MPAs and those outside the South East are not fully substantiated by Statements of Common Ground or Duty to Cooperate information.

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(See associated Excel Work book)

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