mpa
essential materials
sustainable solutions

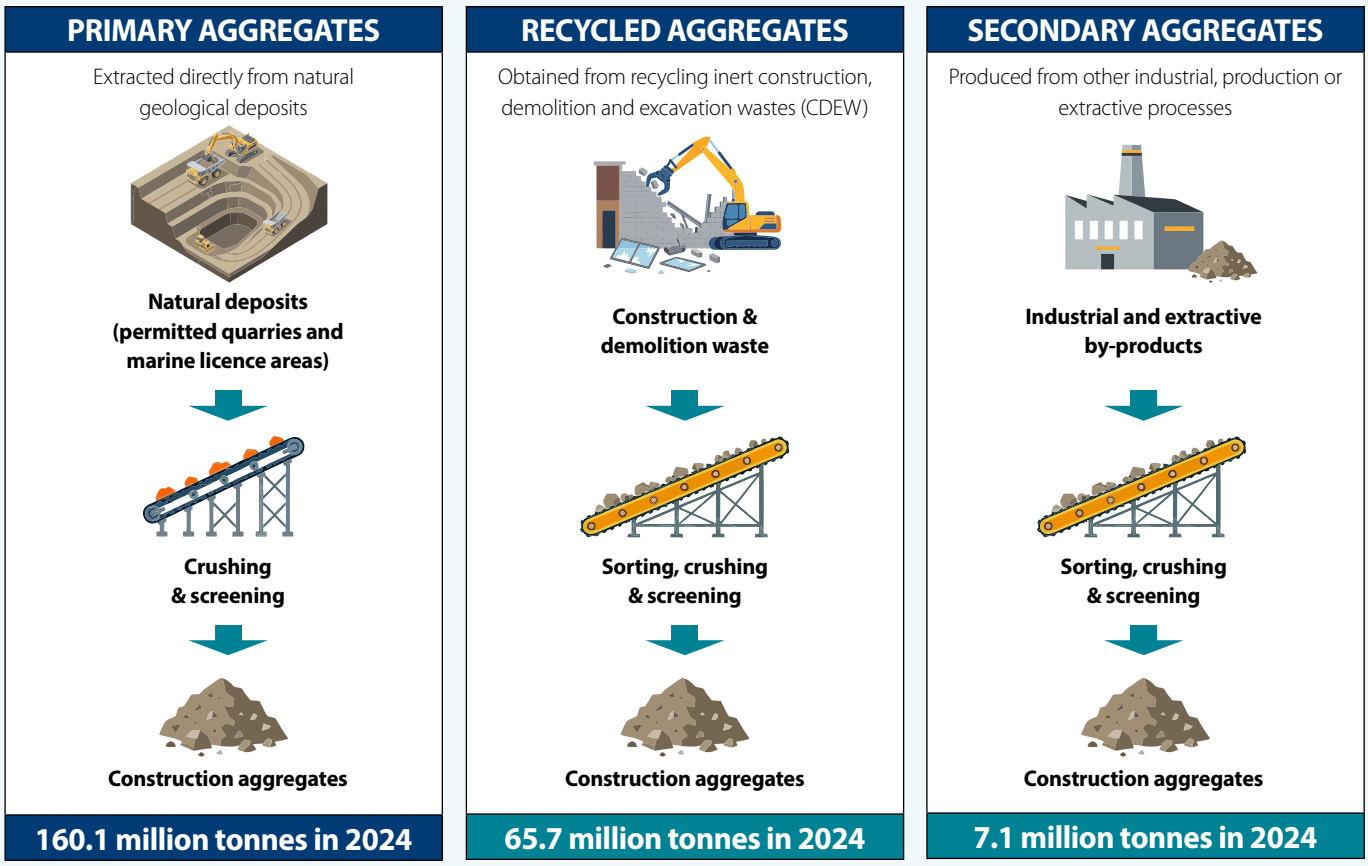
Construction Aggregates Supply in Great Britain:

Primary, Recycled and Secondary Aggregates in 2024

Mineral Products Association

Overview of the Aggregates Market

Figure 1: Sources of aggregates supply, Great Britain



2024 total aggregates supply
232.8 million tonnes[1]

Recycled and secondary aggregates
31% of total aggregates supply

Construction aggregates form the backbone of the mineral products industry. They are essential to build homes, infrastructure including transport and energy networks, commercial and industrial buildings, utilities, schools, and hospitals, and more. They represent the largest material flow in the UK economy.

Aggregates are used in all facets of construction and are essential in the manufacture of asphalt, ready-mixed concrete, cement, lime, and mortar.

Primary aggregates are the leading source of supply, consisting of quarried crushed rock, and land-won and marine-dredged sand and gravel. In 2024, Great Britain produced 160.1 million tonnes of primary aggregates (Figure 1), of which 109.4 million tonnes were crushed rock and 50.6 million tonnes sand and gravel (see Primary Aggregates, pages 5-6). Additionally, an estimated 17 million tonnes were produced in Northern Ireland. Primary aggregates are locally sourced across the UK, with international imports limited. As geological resources are unevenly distributed, aggregates are transported by road, rail and sea to meet demand across the country.

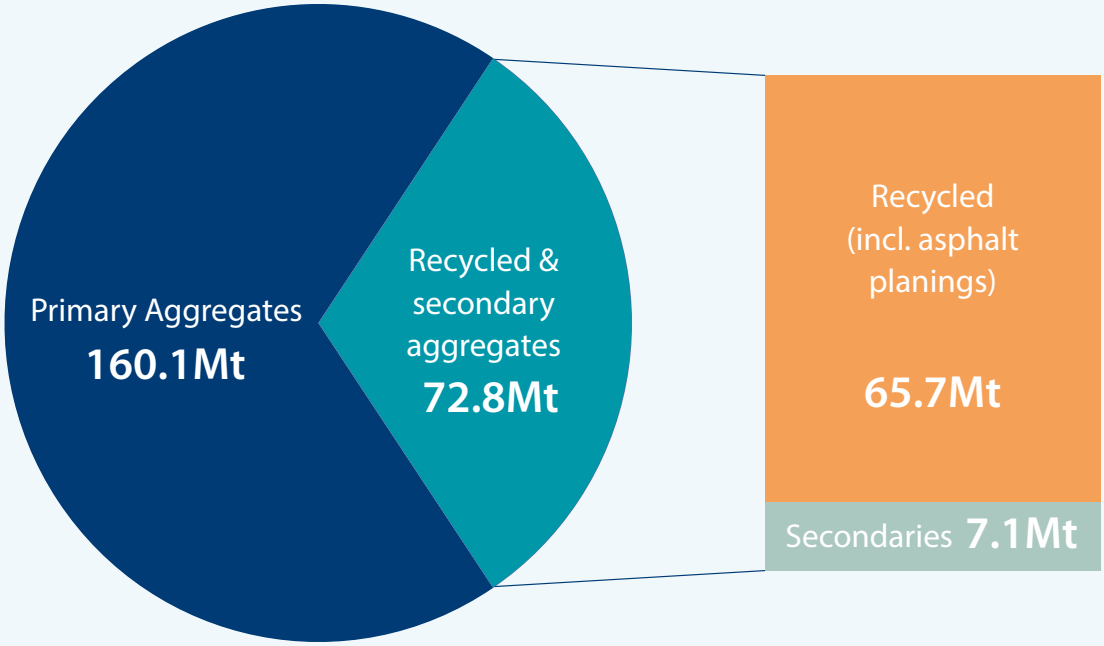
Construction aggregates can also be supplied from the recycling of inert Construction, Demolition and Excavation Wastes (CDEW), or materials derived from other industrial, production or extractive processes, referred to as secondary aggregates. This includes waste materials derived from china clay, ball clay and slate extraction. It also comprises furnace ash and slag from iron and steel production, which are referenced as 'manufactured aggregates' in line with the BS EN aggregate product standards.

Recycled and secondary aggregates can be substituted for primary aggregates in many applications, making a substantial contribution to overall supply and the circular economy. Their usage reduces the need for primary aggregates and helps to reduce waste, and can lower energy consumption and transport costs in local markets, underpinning a more resource-efficient construction sector. Understanding the scale of the recycled market, as well as its limitations, are vital for assessing resource efficiency, monitoring progress towards a more circular economy, and informing future policy and investment planning.

[1] Total may not sum exactly due to rounding.

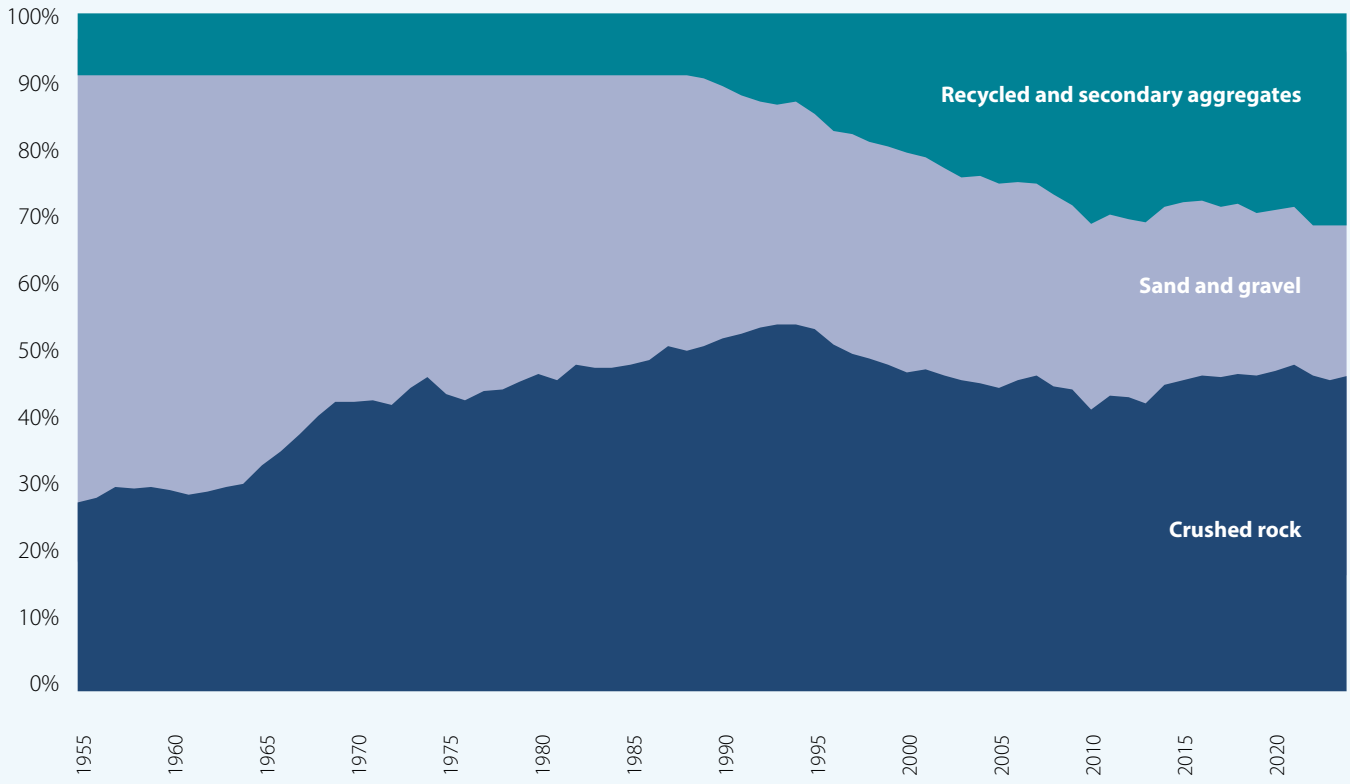
Overview of the Aggregates Market

Figure 2: Constituents of aggregates supply (million tonnes) in Great Britain, 2024



2024 total aggregates supply = **232.8 Mt**

Figure 3: Share of total aggregates supply in Great Britain, 1955-2024



Overview of the Aggregates Market

MPA estimates fill an important evidence gap on recycling

In the absence of comprehensive official data on the availability and re-use of hard construction and demolition waste since the former Department for Communities and Local Government (DCLG) survey in 2007, the Mineral Products Association (MPA) has developed a methodology to estimate the supply of recycled and secondary aggregates. This approach, which draws on third-party statistics wherever available and applies tested, material-specific assumptions (see Definitions and Methodology, page 5), provides the most complete picture of the scale of recycling in the aggregates sector across Great Britain.

Collectively, recycled and secondary aggregates production was estimated at 72.8 million tonnes in 2024 (Figure 2), representing 31% of total aggregates supply. This share has been broadly stable in recent years (Figure 3), and places Great Britain among the leading countries in Europe for the use of recycled and secondary aggregates (Figure 4).

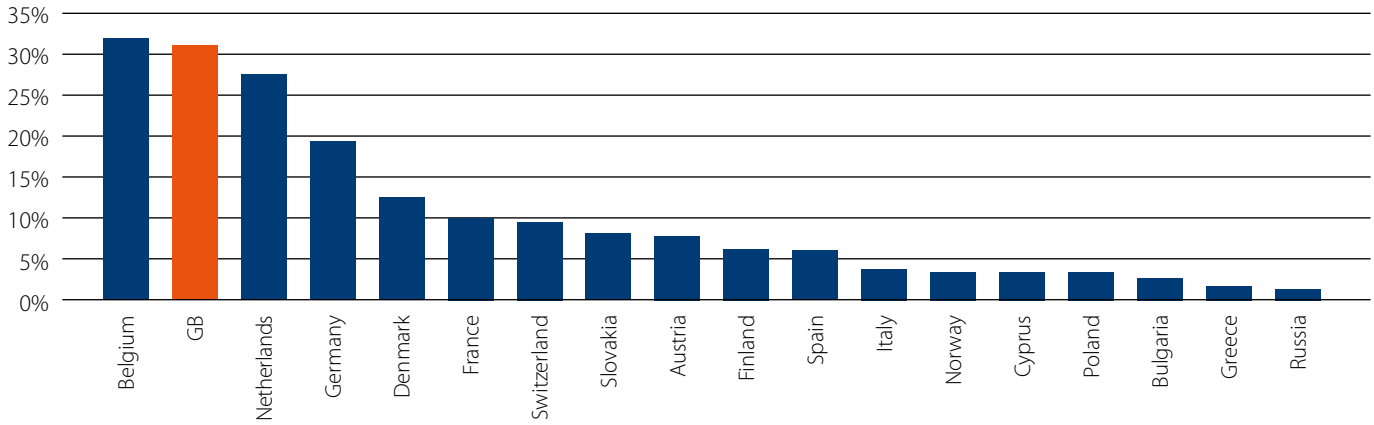
New government statistics are needed to enable more robust monitoring of industry progress towards circularity, sustainability and decarbonisation, while helping businesses make informed investment decisions in recycling facilities, technology and machinery. Environment Agency waste data[2] has limited value since it excludes material that is reused or recycled at source, such as that processed directly on construction sites. It also excludes sites operating under a waste exemption, although these are subject to volume limits. Elsewhere, UK-wide digital waste reporting will be mandatory by January 2027, yet its scope to better track construction, demolition and excavation waste remains uncertain.

A real-world view of the recycled aggregates market

The contribution of recycled aggregates presented in this report is considered to be conservative. The MPA analysis assumes a broadly consistent market for recycled aggregates over time, but this does not reflect new technologies and capacity to convert waste into valuable resources. Therefore, the estimates likely understate the contribution recycled aggregates make to the overall construction aggregates supply mix, albeit the lack of national data makes this difficult to quantify. Aggregates, hardcore, fill, crushed brick etc. used or supplied outside regulatory frameworks (e.g. crushed on small-scale construction sites) are also unlikely to ever be officially recorded.

The growing importance of resource circularity has fundamentally shifted the way recycled aggregates are viewed and used. Changes to landfill tax obligations and the exemption of recycled aggregates from the aggregates levy mean there are strong financial incentives to recover, process, and re-use hard construction and demolition materials. So while the MPA analysis offers a conservative assessment, a combination of regulatory and commercial forces mean that the vast majority of suitable materials are being re-processed back into use.

Figure 4: Share of recycled and secondary sources in total aggregates supply, 2024 (Aggregates Europe, MPA)



Primary aggregates will remain critical to satisfy future demand

Recycled and secondary aggregates play a crucial role in meeting Great Britain's demand for construction materials. While recycled aggregates can meet quality standards that allow them to be used in higher specification end-uses, constraints relating to durability, consistency of availability and feed stock, and technical standards mean a large proportion is used in less onerous specifications such as sub-base, fill and in ready-mixed concrete for domestic settings. Recycled aggregates will continue to be an important part of the overall construction aggregates supply mix, freeing up primary materials for higher specification uses, but will never fully replace the need for new land won and marine supplies.

There are also limits on how much additional recycling might be possible, since the availability of material suitable for recycling is reliant on waste arisings from construction and demolition. For example, a policy focus on retrofit and refurbishment of existing buildings rather than new build where possible may constrain the availability of demolition waste.

A separate MPA report estimates that between 3.8 and 4.1 billion tonnes of aggregates will be required in the period 2022 to 2035, under a range of scenarios (MPA, 2022). Primary aggregates would continue to supply over two-thirds of overall demand to meet the UK's long-term plans for housing, transport, energy, defence and other nationally significant infrastructure. However, the long-term decline in permitted reserves of primary aggregates identified by MPA (MPA, 2024) raises serious concerns about the sector's ability to ensure a sufficient and timely supply of essential aggregates. Effective planning, monitoring and resource management are critical to ensure that the right minerals are available in the right place at the right time.

[2] Waste Material registered under the CL:AIRE Definition of Waste : Code of Practice is also excluded.

Constituents of Aggregates Supply

Definitions and Methodology

Primary aggregates are minerals extracted directly for use as aggregates (BS EN Aggregate product standards "Natural"). In 2024, crushed rock accounted for 69% of total primary aggregates production, with the remainder supplied by land-won and marine-dredged sand and gravel. Whilst local and regional markets may be highly dependent on a particular type of aggregates due to geological availability or the need for specific construction products, the total market is mostly supplied from domestic sources. Aggregates imports account for less than 5% of total supply[3].

Recycled aggregates are materials derived from inert Construction, Demolition and Excavation Wastes (CDEW), which are reprocessed and re-used as aggregates for construction purposes whenever possible. This includes the hard inert materials which would generally be suitable for recycling into aggregates. This definition includes railway ballast, but excludes asphalt planings, which are accounted for separately. Suitable soft CDEW recovered as recycled soils are also excluded, though these materials are often used for land restoration (MPA, 2019).

Secondary aggregates are by-products of other industrial, production or extractive processes, which can be used as aggregates for construction purposes. These include blast furnace iron and steel slags, incinerator bottom ash (IBA), fly ash, furnace bottom ash (FBA), china clay, ball clay, slate and chalk waste and colliery spoils. Collectively, these materials make an important contribution to the total aggregates supply and, depending on their quality and composition, can be used as replacement construction aggregates in the manufacture of concrete and concrete products and a range of other construction applications. Certain secondary aggregates are defined as manufactured aggregates within the BS EN aggregate product standards.

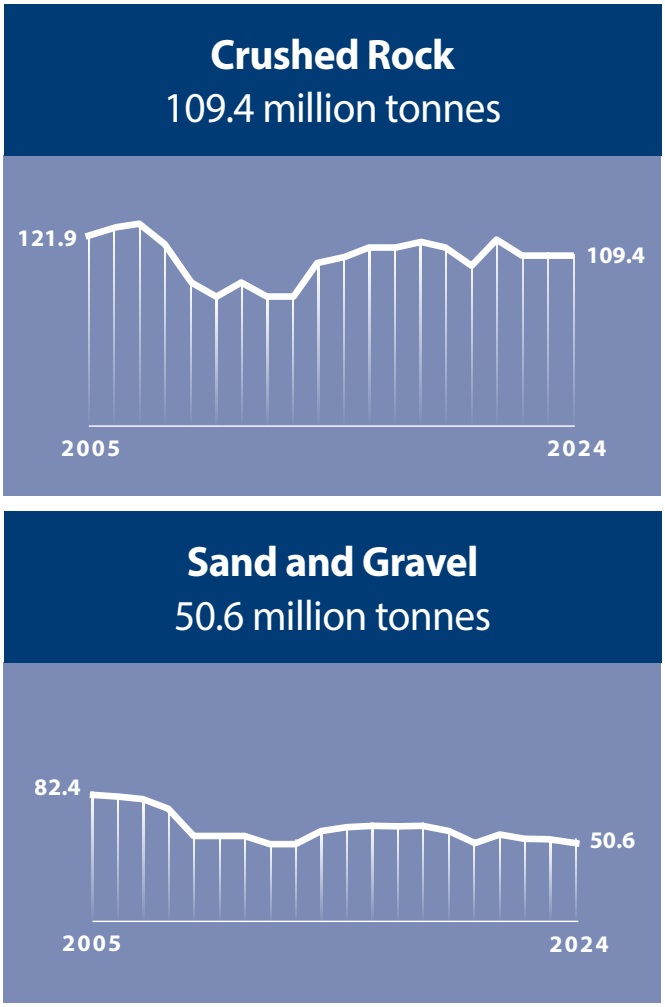
In the absence of up-to-date Government data, estimates of CDEW and secondary aggregates use rely on construction and sales data combined with statistics from historical research for the years 2005 and 2008 (DCLG, 2007a; DCLG, 2007b; WRAP, 2010). Based on this previous research, it is assumed that all CDEW which can be recycled as aggregates is being used, with limited scope for a significantly higher share of CDEW in aggregates markets. Research by the former DCLG (now MHCLG) indicated that this was already the case in 2005, finding little evidence of hard construction and demolition waste which could be recycled into aggregate being landfilled as waste (DCLG, 2007a). With businesses increasingly focused on circularity and sustainability, in addition to rising landfill costs, it is likely that all resources are being recycled and used as aggregates where practicable.

Using the information available, MPA estimates the contribution of recycled and secondary aggregates to total aggregates supply from 2009 onwards using a range of material-specific assumptions, which are detailed in the following sections[4].

[3] In 2023, just 4.6 million tonnes of primary aggregates were imported into Great Britain principally from Norway, but with small quantities from France and Northern Ireland (BGS, 2025).

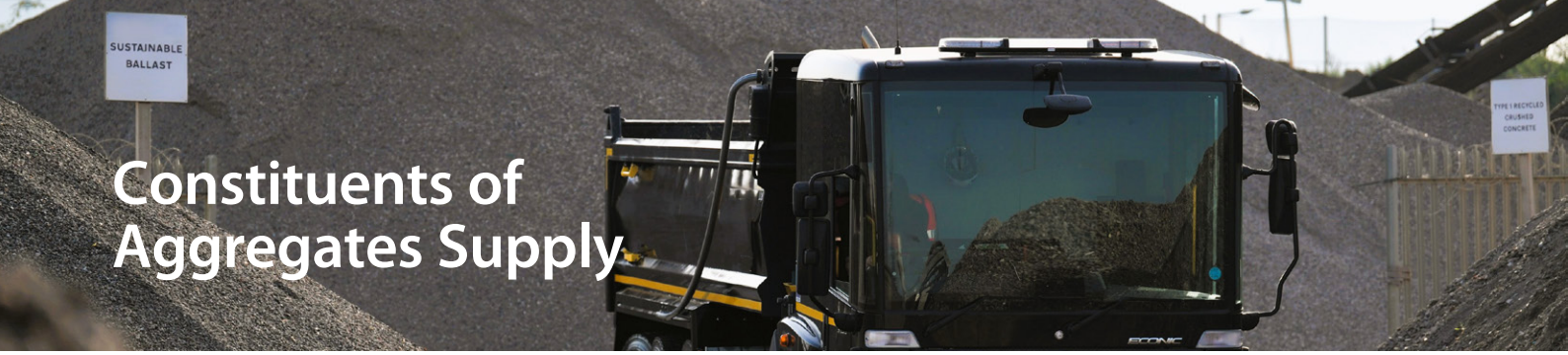
[4] The devolved administrations may publish recycling data based on activities in their jurisdictions, which may differ from the estimates for Great Britain presented in this document.

Primary Aggregates



Historical statistics on all non-energy mineral production in Great Britain are available from the AMRI Survey, previously carried out by the Office for National Statistics (ONS). This includes data on extracted sales of chalk, clays, crushed rock, dolomite, granite, limestone, peat, ore minerals, salt, sandstone, sand and gravel, slate and other minerals, together with employment for each quarry type. The last annual survey available provides data for 2014, after which the government withdrew funding. The discontinuation of the AMRI survey removed a comprehensive source of production data at both regional and national level, weakening the evidence base available to local authorities and Aggregate Working Parties in England for planning and monitoring future aggregate supply.

More recent statistics on primary aggregates sales only in England and Wales (BGS, 2016; 2021) and in Scotland (BGS, 2023a) are available from the Aggregate Minerals Surveys (AM survey). The 4-yearly survey provides national and regional sales patterns, inter-regional flows, transportation, consumption and permitted reserves for primary aggregates. The latest report covers the whole of Great Britain, with data up to 2023 (BGS, 2025).

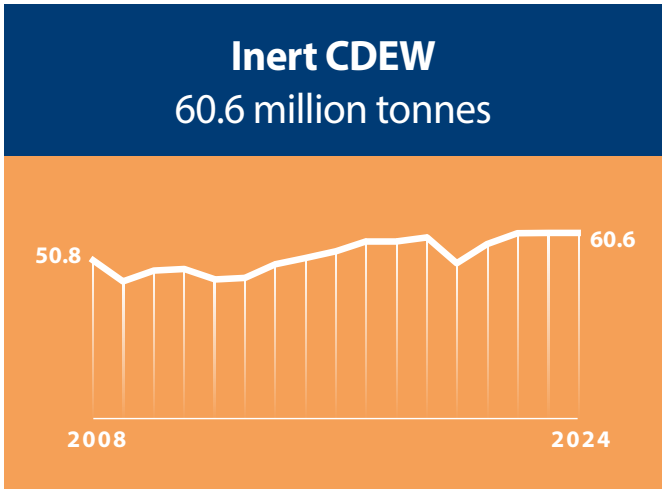


Constituents of Aggregates Supply

There are no other official sources of statistics for primary aggregates production at a national scale. Thanks to its wide industry representation, MPA can use information collected from its producer members to fill the gaps in the data. MPA collects sales statistics for a range of construction materials, including primary aggregates. In 2024, the MPA Sales Volumes Survey (MPA, 2026) represented 70% of total sand and gravel, and 75% of total crushed rock sales in Great Britain when compared to the most recent AM survey. Overall, the sizable market representation makes it possible to use the MPA data trends as a reliable proxy for changes in total primary aggregate sales in Great Britain for more recent years.

MPA estimates that 160.1 million tonnes of aggregates were produced in Great Britain in 2024, comprising 109.4 million tonnes of crushed rock and 50.6 million tonnes of sand and gravel (see Appendix 1). The methodology is based on the total primary aggregates sales as published in the AMRI surveys up to the year 2013, and a combination of the AM survey data, data from the Crown Estate, and the trends in MPA producer members' sales to estimate the total primary aggregates market in Great Britain over 2014-24. The MPA estimates are also provided to the British Geological Survey (BGS) for the annual publication of the UK Minerals Yearbooks (BGS, 2026).

Recycled Aggregates



Recycled aggregates mainly originate from waste generated during construction, demolition, and excavation activities. CDEW arisings are processed into marketable aggregates at either fixed recycling sites (often located on quarries) or directly at construction sites using mobile equipment. The resulting aggregates can then be used directly on-site or offsite.

Historical data for England for the years 2005 and 2008 are available from the former DCLG and WRAP. According to these two reports, the total production of recycled aggregates in England was 42.1 million tonnes in 2005 and 43.5 million tonnes in 2008 (DCLG, 2007a; WRAP, 2010). These tonnages include hard inert CDEW, i.e. materials which would generally be suitable for processing into aggregates (Table 1). This definition includes railway ballast, which can be reused on the track, or in land reclamation or for other construction purposes. It excludes asphalt planings which are accounted for separately. Recycled soils are also excluded.

Table 1: European waste codes for hard inert CDEW include:

EWC code	Description
17.01.01	Concrete
17.01.02	Bricks
17.01.03	Tiles and ceramics
17.01.07	Mixture of concrete, bricks, tiles and ceramics
17.05.08	Track ballast
17.02.02	Glass waste
19.12.09	Minerals (incl. sand, stones from waste treatment)

Based on the England data, MPA assumed a further 4 million tonnes of recycled aggregates produced in Scotland and 3 million tonnes in Wales, resulting in a total of 49.1 million tonnes of recycled aggregates in 2005 in Great Britain. The estimate for Great Britain in 2008 is obtained using the England trend recorded over 2005-08, leading to a total production of recycled aggregates of 50.8 million tonnes in 2008. There has been no further information published on recycled aggregates at the national level since the WRAP report.

Meanwhile, robust data on the arisings of CDEW also remains difficult to obtain and a standard methodology has yet to be adopted nationally. Available information includes:

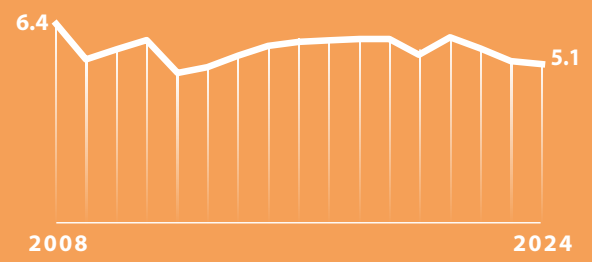
- In England, The Environment Agency publishes annual data from regulated waste management facilities as part of its Waste Data Interrogator (Environment Agency, 2026b). Whilst this will include waste material that is suitable for use as a recycled aggregate, it excludes materials processed by mobile plants directly on construction sites, which is likely to result in significant underestimation of total tonnages of recycled aggregates.
- In Scotland, data from Scottish Environment Protection Agency (SEPA) showed a total of 4.3 million tonnes of construction and demolition waste in 2023, with significant variations from year to year[5] and little scope for trend identification.
- A survey from Natural Resources Wales showed that the Welsh construction and demolition sectors generated an estimated 3.4 million tonnes of waste in 2019, including mixed wastes (45%), soils (38%), segregated aggregates (7%) and other non-metallic wastes (3%) (Garrett, Armstrong, Fogarty, & Fry, 2022).

Without further information, the MPA methodology to project the volume of recycled aggregates to 2024 is based on the assumption that the trends in construction activity (ONS, 2026) should be a reasonable indicator for the trend in demolition work, and therefore of the generation of CDEW. On that basis, MPA conservatively estimates that 60.6 million tonnes of inert CDEW waste were produced in 2024 (Appendix 1).

[5] As low as 3.7 million tonnes in 2012 and as high as 5.8 million tonnes in 2018 (SEPA, 2026).

Constituents of Aggregates Supply

Asphalt Planings
5.1 million tonnes



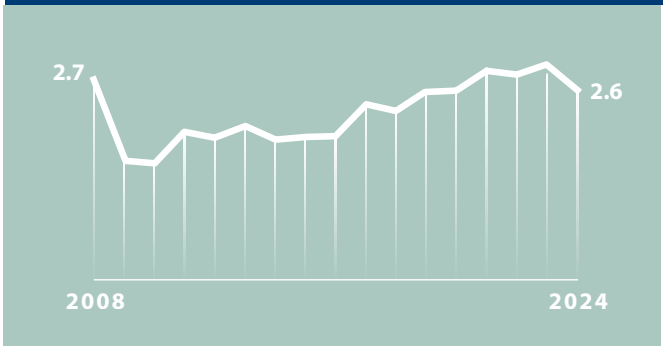
According to the European Asphalt Pavement Association (EAPA), asphalt materials are almost unique among construction products in that they can be 100% recycled, and in many cases reused directly back into the application and even the site from which they have been extracted (EAPA, 2014). The availability of asphalt planings is therefore closely linked to general road maintenance.

A total of 8 million tonnes of asphalt planing arisings were available in the UK in 2005, 5.6 million tonnes (70%) of which occurred in England (DCLG, 2007b). To obtain a Great Britain estimate, MPA assumed an equal split of the difference between the UK and England to represent Scotland, Wales and Northern Ireland (0.8 million tonnes each), meaning total arisings of 7.2 million tonnes in 2005.

No further direct sources of information on the size of the asphalt planings market at the national level could be identified. As a result, from 2008 onward, MPA assumed total asphalt planings to follow the trend in MPA asphalt sales, a proxy for general road maintenance activity. MPA estimates that 5.1 million tonnes of asphalt planings were recycled as construction aggregates in 2024 (Appendix 1).

Secondary Aggregates

China and Ball Clay Waste
2.6 million tonnes



A major source of secondary aggregates is the by-products derived from the extraction and processing of china and ball clay. To obtain one tonne of saleable china clay, up to nine tonnes of other materials are generated (KaBCA, n.d.). Most of this waste can be used as general fill material for both engineering purposes and site restoration, or in other aggregate uses after crushing and screening, such as in concrete or as building sand.

In 2005, china clay quarries in Devon and Cornwall produced 19.6 million tonnes of waste arisings, 2.6 million tonnes (13.4%) of which were used as aggregates (DCLG, 2007b). After 2005, data availability is limited. There are nonetheless annual statistics on sales volumes of china and ball clay sales in Great Britain, which show a total of 1.2 million tonnes in 2024 (BGS, 2026)[6]. As this data is for total sales, not just for waste materials, an estimation of china and ball clay waste production is needed.

According to the Kaolin and Ball Clay Association (KaBCA), each tonne of china clay typically produces up to nine tonnes of waste arisings, whilst the ratio of waste to production for ball clay is variable but generally in the order of 1 to 1.5. Whilst using these ratios should make it possible to estimate the size of china and ball clay waste produced each year, in practice this is complicated by the fact that the production of secondary aggregates from clay waste also involves the processing of large historic stockpiles. Consequently, a direct relationship between the rates of primary clay production at any one time and the production of secondary aggregates cannot be assumed. Furthermore, not all of the waste will necessarily be suitable for use as aggregates.

Nearly all clay arisings in Great Britain occur in only two counties in South-West England, in Devon and Cornwall[7]. Annual Local Aggregate Assessment reports for these counties include published sales volumes for secondary aggregates produced from china and ball clay waste. For instance, in Devon, an estimated 0.5 million tonnes of secondary aggregates were sold in 2024, 87% of which originated from china and ball clay workings (Devon County Council, 2026)[8]. Cornwall recorded sales of 2.2 million tonnes, nearly all of which were derived from china clay waste (Cornwall Council, 2025)[9]. Overall, this indicates that approximately 2.6 million tonnes of clay waste were used as aggregates in Great Britain in 2024 (Appendix 1).

[6] BGS estimate for the UK. There are no china or ball clay workings in Northern Ireland (BGS, 2026).

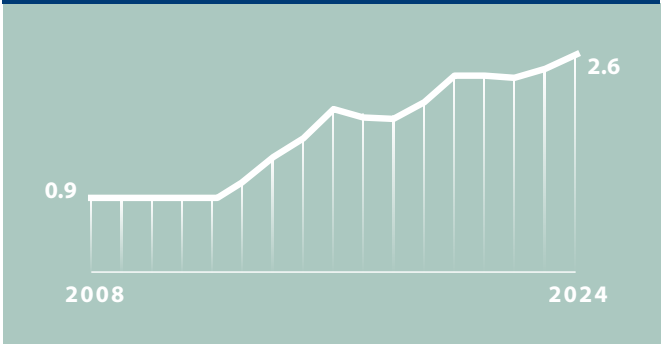
[7] Sand is produced alongside ball clay in Dorset, albeit it is classified as primary aggregate, not secondary.

[8] The draft report indicated 65% but Devon County Council have confirmed 87% as the correct share.

[9] Whilst mainly used within Cornwall, some material is delivered into London by sea.

Constituents of Aggregates Supply

Incinerator Bottom Ash (IBA)
2.6 million tonnes



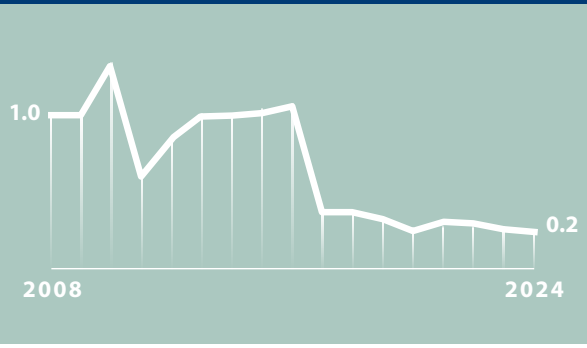
IBA is the output of municipal solid waste incineration. It may contain glass, ceramics, bricks, concrete, grit, and stone in addition to ash and metals. It is commonly recycled as a substitute for primary aggregates in construction, for example as fill material, in road paving, or in concrete or construction blocks.

In England and Wales, approximately 1.0 million tonnes of IBA were produced each year according to the Environmental Services Association (ESA). In 2011, about 86% of IBA was reused as aggregates, with the remainder including the recovery of metals and hazardous materials (ESA, 2016). With no further information available, this volume is carried over for the years 2005-12.

From 2013, more comprehensive data have been available through the Environment Agency's reporting on waste transferred offsite for recovery or disposal. Consolidating figures for inert bottom ash and slag shows that 1.2 million tonnes of IBA were produced in 2013 (Environment Agency, 2026a), of which 1.1 million tonnes (86%) are assumed to have been reused as aggregates. Applying the same methodology across 2013-24 indicates a total of 2.6 million tonnes of IBA reused as aggregates in 2024 (Appendix 1).

This is broadly consistent with an industry estimate from the Manufacturers of IBA Aggregates Association (MIBAAA), which reports that roughly 3 million tonnes of IBA are used in construction each year across the UK (MIBAAA, 2026).

Fly Ash
0.2 million tonnes



Fly ash is the output from the combustion process at coal-fired power stations. As a fine material, fly ash can be used in the manufacture of cement and concrete, as well as an unbound secondary fill material, such as for the construction of embankments.

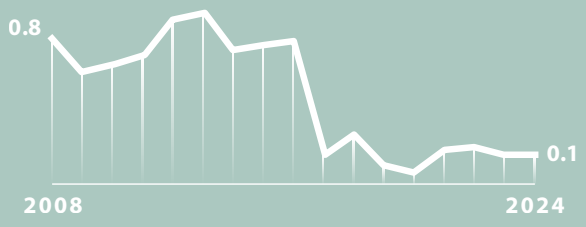
Between 4 and 7 million tonnes of fly ash were produced in Great Britain each year between 1999 and 2014 according to the UK Quality Ash Association (UKQAA). The latest information available on fly ash end-use shows that in 2014, out of a total of 4.6 million tonnes of fly ash sold, 1 million tonnes (21.2%) was used as secondary aggregates in the manufacture of concrete blocks, AAC blocks and as engineering fill.

More recent survey data from the UKQAA for sales and utilisation in Great Britain shows that some 1.1 million tonnes of fly ash were sold in 2024. Assuming the same end-use share as in 2014 would indicate a total of 0.2 million tonnes of fly ash used as secondary aggregates in 2024 (Appendix 1).

The UK's last operational coal-fired power station was closed in September 2024. However, there are significant stockpiles of this material located adjacent to these sites. These legacy deposits represent a potentially significant future source of fly ash, with new processing technologies being explored to support their extraction and use (UKQAA, n.d.).

Constituents of Aggregates Supply

Furnace Bottom Ash (FBA)
0.1 million tonnes



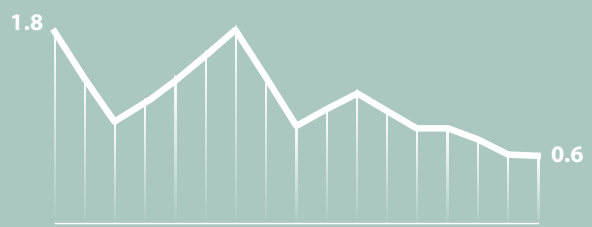
FBA originates from the combustion process at coal-fired power stations. It can be used as a lightweight aggregate in the manufacture of building blocks and structural lightweight fill material.

There were approximately 1.2 million tonnes of total FBA arisings in Great Britain in 2005, 90% (1.1 million tonnes) of which were used as aggregates (DCLG, 2007b). More recent data for total sales of FBA in Great Britain[10] is provided by the UKQAA, to which we apply the same 90% ratio for aggregates use. Where annual volumes are missing, MPA provided an estimate based on the general trend in construction activity (ONS, 2026).

In recent years, declining FBA production in Great Britain reflects the shutdown of coal power stations. In 2024, a total of 138,000 tonnes of FBA were sold in Great Britain, mainly from imports (UKQAA, 2025). Assuming 90% was reused as aggregates would indicate 124,200 tonnes of FBA reused as aggregates in 2024 (Appendix 1).

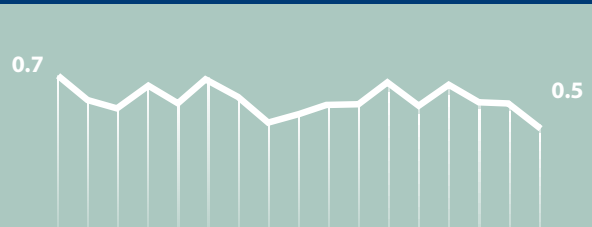
[10] Whilst this data is for the UK rather than Great Britain, the survey does not identify any operational coal-fired power stations based in Northern Ireland.

Iron and Steel Slag
0.6 million tonnes



In 2005, 1 million tonnes of iron and steel slag were used as aggregates in England, which represented two-thirds of total UK production (DCLG, 2007b). More recent data is available as part of an industry survey carried out by Euroslag, for which the MPA collects data from its members. The survey provides information on the total production of iron and steel slag as well as on end uses, including slag used as aggregates for road construction and other end uses such as cement production, hydraulic engineering, fertilisers, uses in metallurgy and other uses such as for glass making. All numbers provided are for the UK rather than Great Britain, but there are no significant steelmaking works in Northern Ireland. Data for 2023 indicated that 0.6 million tonnes of iron and steel slag were reused as aggregates. In the absence of an update at the time of writing, it is assumed that this was unchanged in 2024. (Euroslag, n.d.) (Appendix 1).

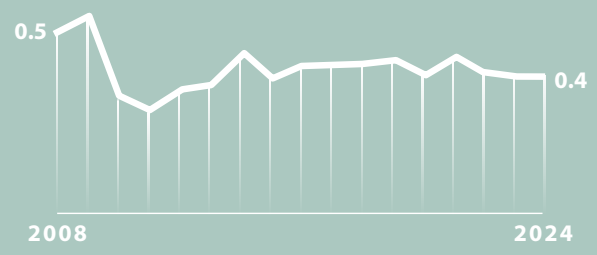
Slate Waste
0.5 million tonnes



Historical information is available on slate deliveries for fill and other construction uses in Great Britain as published by the Department for Business and Trade (DBT, 2026). Since 2019, declining numbers of survey respondents have resulted in increasing suppression of this data to preserve confidentiality. Estimates of slate waste reused as aggregates are now derived from trends in total slate production. This would indicate a total of 0.5 million tonnes of slate waste reused as aggregates in 2024 (Appendix 1). This closely aligns with the information from the North Wales Regional Aggregates Working Party and Local Aggregate Assessments prepared for Cornwall and Cumbria, which together estimate a total of 495,000 tonnes of slate waste sales took place during 2024.

Constituents of Aggregates Supply

Chalk
0.4 million tonnes

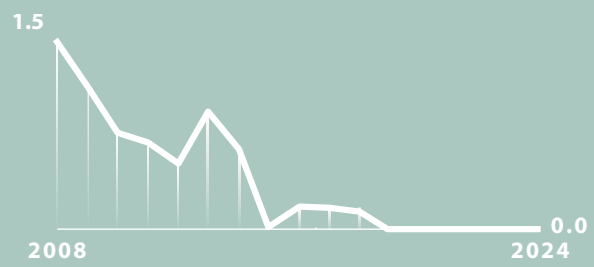


The AMRI surveys, which ceased in 2014, included data on the annual volumes of chalk for construction use excluding cement in Great Britain, after which funding was withdrawn. The last survey available shows that a total of 3.3 million tonnes of chalk were produced in 2014, 423,000 tonnes of which were used for construction purposes other than cement (ONS, 2016). Historically, the share of chalk for construction use excluding cement was relatively stable, ranging from 7% to 13% over 2002-14 (average: 10%).

With no other information from 2015, estimates have been derived from alternative sector data produced by the BGS. A total of 118.8 million tonnes of chalk, igneous rock, limestone, dolomite and sandstone were produced in the UK in 2024 (BGS, 2026). Historically, chalk production represented on average 3.2% of this total between 2008-14. Assuming a similar share, total chalk production in the UK is estimated at 3.8 million tonnes in 2024, with the tonnage for Northern Ireland thought to be relatively small. England accounted for 40 of the 44 mineral workings identified across the UK (BGS, 2026).

Of these 3.8 million tonnes, a long-term average of 10% for construction use (excluding cement) points to a total of 0.4 million tonnes of chalk used as secondary aggregates in 2024 (Appendix 1).

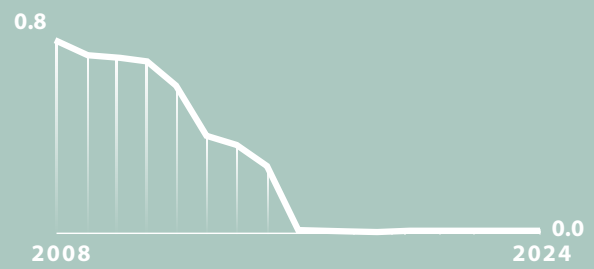
Clay and Shale
Zero (since 2019)



Historical information on clay and shale production by end-use is available from the BGS (BGS, 2023b). In 2005, Great Britain produced 10.9 million tonnes, of which 9.7 million tonnes were for the production of bricks, pipes and tiles and the manufacture of cement. The remainder (1.2 million tonnes) was used for construction and other uses.

The tonnage of clay and shale for construction and other uses peaked at 1.5 million tonnes in 2008, before falling to 0.6 million tonnes in 2014. From 2015, a change in data source coincided with a further drop, reaching just 116,000 tonnes in 2018. Since 2019, production has been zero (Appendix 1).

Colliery Spoils
Zero (since 2016)



Colliery spoil has historically been used as a source of secondary aggregates, mostly as fill material for engineering purposes or to reclaim land. It is generally obtained from deep coal mining.

An estimated 1 million tonnes of colliery spoil were used as aggregates in England in 2005 (DCLG, 2007b). Thereafter, volumes were estimated based on the trend in deep-mined coal production, as published by the DBT (DBT, 2025). Production of deep-mining coal ceased in 2015, suggesting that the use of colliery spoils as construction aggregates is now minimal (Appendix 1).

Appendix 1: Estimates of total aggregates supply in Great Britain, 2005-24																					
(Million tonnes)		**2005**	**2006**	**2007**	**2008**	**2009**	**2010**	**2011**	**2012**	**2013**	**2014**	**2015***	**2016***	**2017***	**2018***	**2019**	**2020***	**2021***	**2022***	**2023***	**2024**
TOTAL PRIMARY AGGREGATES		**204.3**	**207.1**	**208.1**	**187.2**	**146.8**	**136.6**	**145.9**	**132.9**	**134.4**	**161.9**	**170.0**	**176.4**	**175.8**	**179.5**	**170.9**	**152.4**	**176.7**	**162.7**	**164.0**	**160.1**
Crushed rock	(a)	121.9	126.9	129.6	115.1	91.1	82.3	90.9	82.9	82.4	102.3	108.1	113.8	114.4	117.4	112.9	102.1	119.2	109.9	109.7	109.4
Sand & gravel	(b)	82.4	80.2	78.5	72.1	55.7	54.3	55.0	50.0	51.9	59.6	61.9	62.6	61.4	62.1	58.0	50.3	57.5	52.8	54.3	50.6
TOTAL RECYCLED AGGREGATES		**56.3**	**-**	**-**	**57.2**	**49.3**	**53.4**	**54.1**	**49.7**	**50.6**	**55.4**	**57.6**	**59.9**	**63.3**	**63.3**	**64.5**	**55.6**	**62.5**	**65.8**	**65.7**	**65.7**
Non-hazardous CDEW (incl. track ballasts)	(c)	49.1	-	-	50.8	44.1	47.8	48.3	44.8	45.5	50.0	51.9	54.1	57.4	57.4	58.6	50.2	56.5	60.1	60.5	60.6
Asphalt planings	(d)	7.2	-	-	6.4	5.3	5.6	5.8	4.8	5.0	5.4	5.7	5.8	5.9	6.0	5.9	5.4	6.0	5.6	5.2	5.1
TOTAL SECONDARY AGGREGATES		**11.8**	**-**	**-**	**10.6**	**8.5**	**7.8**	**7.8**	**8.0**	**9.1**	**8.9**	**7.9**	**7.7**	**7.0**	**7.1**	**7.1**	**7.1**	**7.6**	**7.4**	**7.4**	**7.1**
China and ball clay waste	(e)	2.6	-	-	2.7	1.6	1.6	2.1	2.0	2.1	1.9	2.0	2.0	2.4	2.3	2.6	2.6	2.9	2.8	3.0	2.6
Incinerator bottom ash (IBA)	(f)	0.9	-	-	0.9	0.9	0.9	0.9	0.9	1.1	1.3	1.6	1.9	1.8	1.8	2.0	2.3	2.3	2.3	2.4	2.6
Fly ash	(g)	1.8	-	-	1.0	1.0	1.3	0.6	0.8	1.0	1.0	1.0	1.1	0.4	0.4	0.3	0.2	0.3	0.3	0.3	0.2
Furnace bottom ash (FBA)	(h)	1.1	-	-	0.8	0.6	0.6	0.7	0.9	0.9	0.7	0.7	0.8	0.1	0.2	0.1	0.0	0.2	0.2	0.1	0.1
Iron and steel slag	(i)	1.5	-	-	1.8	1.4	0.9	1.1	1.3	1.6	1.8	1.4	0.9	1.1	1.2	1.1	0.9	0.9	0.8	0.6	0.6
Slate waste	(j)	0.9	-	-	0.7	0.6	0.6	0.7	0.6	0.7	0.6	0.5	0.6	0.6	0.6	0.7	0.6	0.7	0.6	0.6	0.5
Chalk	(k)	0.8	-	-	0.5	0.5	0.3	0.3	0.3	0.3	0.4	0.4	0.4	0.4	0.4	0.4	0.4	0.4	0.4	0.4	0.4
Clay and shale	(l)	1.2	-	-	1.5	1.1	0.8	0.7	0.5	0.9	0.6	0.0	0.2	0.2	0.1	0.0	0.0	0.0	0.0	0.0	0.0
Colliery spoil	(m)	1.0	-	-	0.8	0.8	0.8	0.8	0.6	0.4	0.4	0.3	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0
TOTAL AGGREGATES SUPPLY		**272.3**	**-**	**-**	**255.0**	**204.6**	**197.8**	**207.8**	**190.5**	**194.0**	**226.1**	**235.5**	**244.0**	**246.1**	**249.9**	**242.5**	**215.0**	**246.8**	**235.8**	**237.2**	**232.8**
Share of recycled and secondaries		25%	-	-	27%	28%	31%	30%	30%	31%	28%	28%	28%	29%	28%	30%	29%	28%	31%	31%	31%
OTHER INDUSTRY INDICATORS																					
Construction output (annual %)	(n)	-2.4%	0.8%	2.2%	-2.6%	-13.2%	8.5%	1.0%	-7.2%	1.6%	9.9%	3.8%	4.1%	6.1%	0.0%	2.1%	-14.3%	12.5%	6.5%	0.6%	0.1%
MPA Asphalt sales (annual %)	(o)	3.6%	-7.8%	0.3%	-4.0%	-17.5%	6.0%	4.2%	-16.9%	3.9%	6.9%	5.9%	2.4%	1.1%	1.2%	-1.0%	-8.5%	11.5%	-6.4%	-6.9%	-2.5%
Deepmined coal output (annual %)	(p)	-23.8%	-1.2%	-18.7%	5.5%	-7.1%	-1.7%	-1.1%	-15.9%	-33.6%	-9.9%	-24.5%	-	-	-	-	-	-	-	-	-

Sources and notes:

Figures may not sum precisely due to rounding.

– not available.

* Include marginal revisions of previous estimates.

(a) BGS (2026), MPA estimates.

(b) BGS (2026), MPA estimates.

(c) 2005, 2008: England totals from WRAP (2010). MPA estimates for Scotland and Wales. From 2009: MPA estimates based on construction trends.

(d) 2005: England total from DCLG (2007b). MPA estimates for Scotland and Wales. From 2008: MPA estimates based on asphalt sales.

(e) 2005: DCLG (2007b). From 2008: Data from Devon County Council and Cornwall Council.

(f) 2005-12: ESA. From 2013: Data for England and Wales from the Environment Agency (2026). Include EWC 10 01 01 ; 10 01 15; 19 01 12.

(g) UKQAA. Where data is missing (2015-2016), it is assumed to follow construction trends.

(h) 2005: England total from DCLG (2007b). 2008-24: UKQAA.

(i) 2005: England total from DCLG (2007b). From 2008: Euroslag.

(j) 2005: England total from DCLG (2007b). 2009-24: DBT (2026).

(k) 2005-14: BGS (2026). Includes chalk for other construction uses (excl. cement). 2015-24: MPA estimates.

(l) 2005-24: BGS (2026).

(m) 2005: DCLG (2007b). From 2008: Follows deepmined coal production trends.

(n) ONS (2026).

(o) MPA (2026).

(p) DBT (2025).

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The Mineral Products Industry At A Glance

Key Metrics (UK, 2023)

397 million tonnes

Over 1 million tonnes every day, the UK's largest material flow across the economy.

95% used in construction

Mineral products are the backbone of construction, while also essential for key industrial processes.

2,200 sites and plants nationwide network

A nationwide network to meet local and national needs.

£6.7 billion Gross Value Added (GVA)

Direct contribution to the UK economy, building the foundation of future growth.

£253 billion indirect GVA

Equivalent to 11% of the UK economy supported through the supply chain.

5.8 tonnes per capita

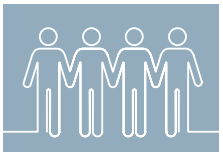
Average mineral products use per person each year.

89,000 jobs directly generated

Highly productive, well paid local jobs, nationwide.

£75,000 productivity per job

35% higher than the national average.



3.4 million jobs supported in supply chain

In construction, manufacturing, chemicals, food, pharmaceuticals and more.

The Mineral Products Association is the trade association for the aggregates, asphalt, cement, concrete, dimension stone, lime, mortar and industrial sand industries.

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essential materials
sustainable solutions