



AMPS 2023

11th Annual Mineral Planning Survey Report



EXECUTIVE SUMMARY

The long-term reserve base upon which the aggregates sector and its customers are so dependent remains under pressure, with annual sales continuing to exceed the rate that new reserves are being permitted or ‘replenished’.

This report is published as a new Government gets to work, with planning reform focused on housing and infrastructure at the top of their agenda. As the Government seeks to build more houses and infrastructure, MPA’s members are working to supply the essential mineral resources – sand, gravel and crushed rock - needed to deliver these ambitions.

Unless there are significant reforms to planning, permitting and the investment environment, these mineral reserves will not be fully replaced. This includes reserves of sand and gravel, which is a major ingredient of concrete and other construction products. The availability and supply of these essential minerals cannot be taken for granted any longer.

The survey shows total GB aggregate sales by MPA members declining by 5.35% (after an 8.9% fall in 2022), with volumes the lowest since 2013. Notwithstanding the reduced sale volumes, the report identifies that the long-term reserve base upon which the aggregates sector is so dependent remains under pressure, with annual sales continuing to exceed the rate that new reserves are being permitted or ‘replenished’ (see Figures 1 and 2). The continuing decline in the reserve base was confirmed in the Aggregate Minerals Survey for England and Wales, AM2019.

Analysis of the relationship between reserve replenishment rates and annual sales illustrates the continued trend emerging across Great Britain, particularly in regions that traditionally have been responsible for supplying aggregates to other regions in order to meet market demand. The 10-year average sales and reserves for each region (see Figures 3 and 4) for both sand and gravel and crushed rock continue to illustrate the challenge that many regions, including those responsible for the strategic national supply of rock, are facing in maintaining their reserve base.

Over the latest 10-year period (2014-23), the volume of sand and gravel sales volumes exceeded the volumes of new permitted reserves in two thirds of the geographic data sets reported. In the South East (the biggest producing region), the volumes of sand and gravel sales during 2014-23 was almost three times higher than the volume of new permitted reserves.

Over the latest 10-year period (2014-23), the volume of crushed rock sales exceeded the volumes of newly permitted reserves across all of the nine geographic regions for which data was reported. Compared to the previous 10 year period (2012-2021), the replenishment rate deteriorated most noticeably in the South West. In the East Midlands (the largest producing region by sales), the volumes of crushed rock sales during 2014-23 was almost 18 times higher than the volume of new permitted reserves.

In 2023, the average time taken to determine a mineral planning application (pre-application through to a permission being issued) was 22.6 months for sand and gravel and 36.6 months for crushed rock. However, the overall mineral development cycle, from application preparation through to implementing a consent will be significantly longer. Typically, it can take between 5 to 15 years to convert a new site from exploration into an active, operational concern. The continued absence of a strategic approach to forecasting future demand requirements is increasingly resulting in tensions between mineral planning authorities, and hindering the Aggregate Working Parties in England to effectively monitor whether adequate provision is being made, which is fundamental to the effective functioning of the Managed Aggregate Supply System (MASS). This in turn creates unnecessary uncertainty for industry in committing to investment and long-term developments. An increasing number of planning applications appear to be being refused against officer recommendations. Consequently, the industry is increasingly having to plan by appeal, as was the situation in the 1990s. This situation is not unique to mineral development, with planning decisions for new housing being similarly affected.

Minerals are a key foundation sector that enables economic activity across the wider economy. Given this role, the future supply of essential minerals cannot be assumed. It requires effective planning, monitoring and management to ensure the right minerals are available in the right place and at the right time. There is a continued desire from both local authorities and from the minerals industry for the National and Sub-national Guidelines for aggregates provision in England to be updated to provide a much-needed forecast of need and to support the delivery of MASS. To this end, it is encouraging that the mineral planning function within MHCLG continue to hold National Aggregates Coordination Meetings, after a hiatus, from which a Task & Finish Group has formed to consider a refresh of the Guidelines and how levels of national provision required might be apportioned to the local level. The outputs from the latest Aggregate Mineral Survey for England, Wales and Scotland (AM2023) will be used to help inform a refresh the National and Sub-national for aggregate provision in England. AM2023 would also provide a sound platform for the devolved nations to consider aggregate future provision, in particular, a third review of the Regional Technical Statement in Wales.

The latest MPA report “Aggregates demand and supply in Great Britain: Scenarios for 2035” indicates that between 3.8 and 4.1 billion tonnes of aggregates will be required between 2022 and 2035 to support our construction needs. This compares to a total of 3.2 billion tonnes of aggregates supplied in the previous 14-year period, between 2008 and 2021. Securing the supply of these materials will require active management, planning and investment, supported by regular survey and up to date data to monitor performance.

If the long-term trend of diminishing reserves continues, it is inevitable that the tensions involved in maintaining future supply will increase. In turn, this will result in increased costs and less sustainable supply – as essential minerals have to be transported over ever-growing distances to fulfil demand.



THE KEY FINDINGS OF THE REPORT ARE:

- **Sales** – Land won aggregates sales in 2023 by MPA members were 13.7% lower than in 2021 down from 141.9Mt to 122Mt.
- **Replenishment of sand and gravel reserves** – The rolling 10-year average replenishment rate for sand and gravel reserves was 61% (63% in 2021) indicating that sales continue to exceed the tonnage of new reserves permitted.
- **Replenishment of crushed rock reserves** – The 10-year average replenishment rate of crushed rock reserves was 33% (52% in 2021).
- **Number of planning applications** – There were 52 new minerals applications submitted in 2023. This is in line with long-term average of 50 applications per annum. Out of this total, 8 were for land-won sand and gravel, 4 for crushed rock and 2 for soft sand.
- **Number of planning decisions** – 11 applications were determined for sand and gravel extraction in 2023 (8 in 2021), with 8 being approved (4 in 2021), 1 refused (2 in 2021) and a further 2 withdrawn (2 in 2021). For crushed rock in 2023, 4 applications were approved (6 in 2021), with no refusals or withdrawals.
- **Time taken to obtain permission** – In 2023 it took on average 22.6 and 36.6 months respectively to secure permission (from the commencement of pre-application discussions to the permission being issued) for sand and gravel and crushed rock reserves.
- **Plan Allocations** – Over the past 10 years, at least 51 (32%) of all new permissions issued were for sites that had not been allocated in a mineral plan.

Figure 1. Land-won sand & gravel: Difference between new permitted reserves and sales volumes (GB)

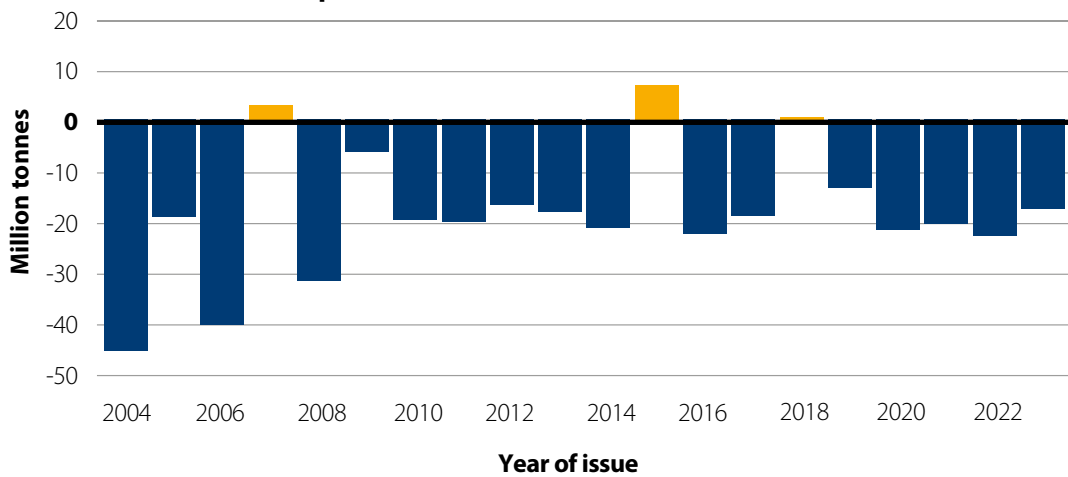
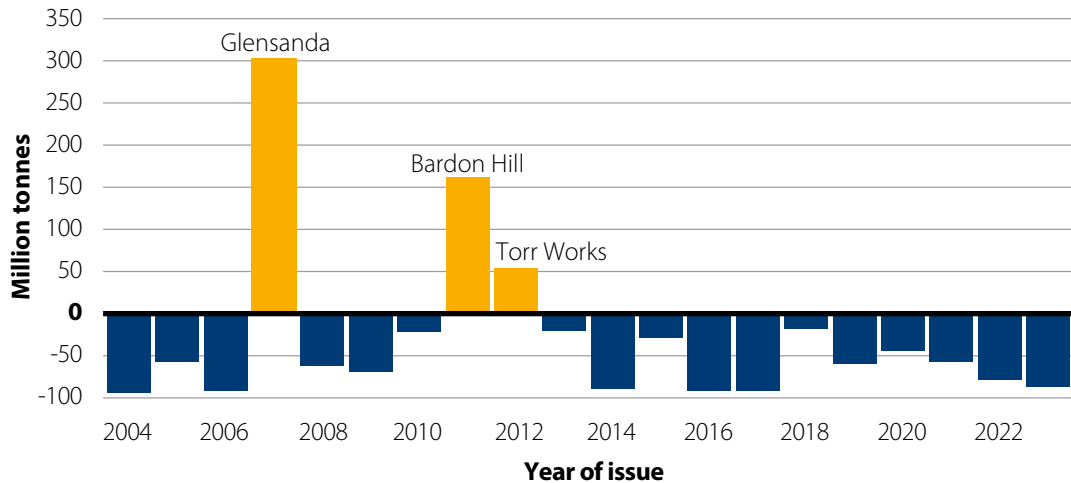
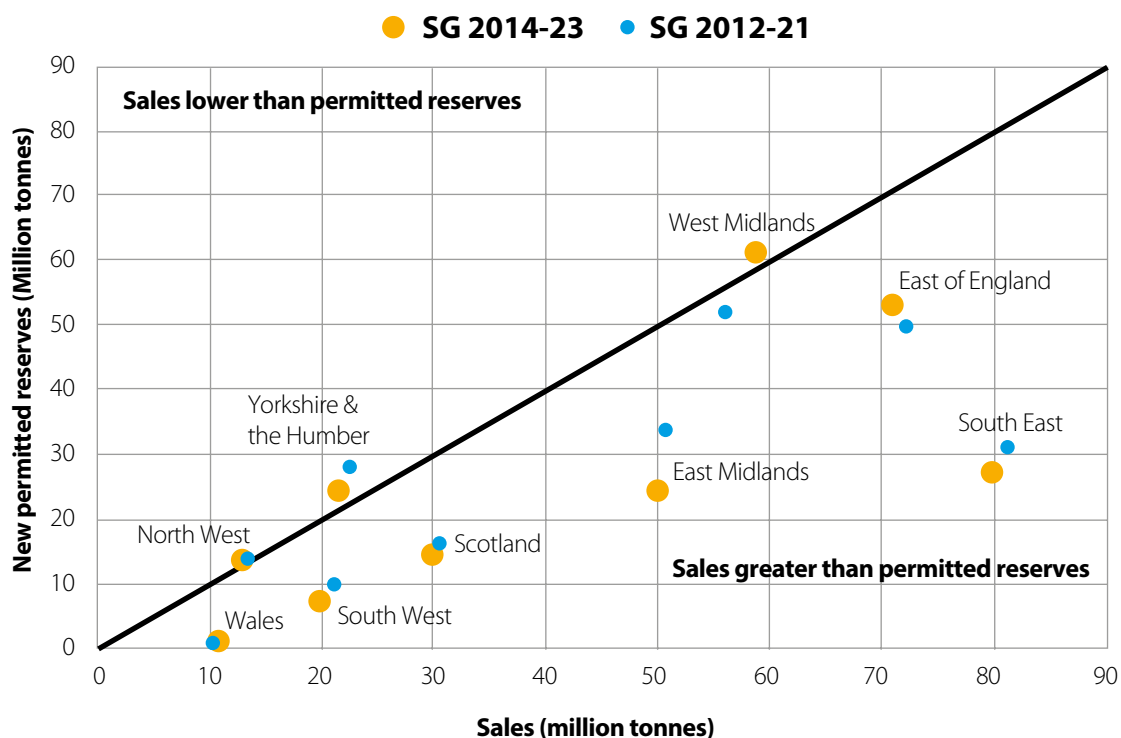


Figure 2. Crushed rock: Difference between new permitted reserves and sales volumes (GB)



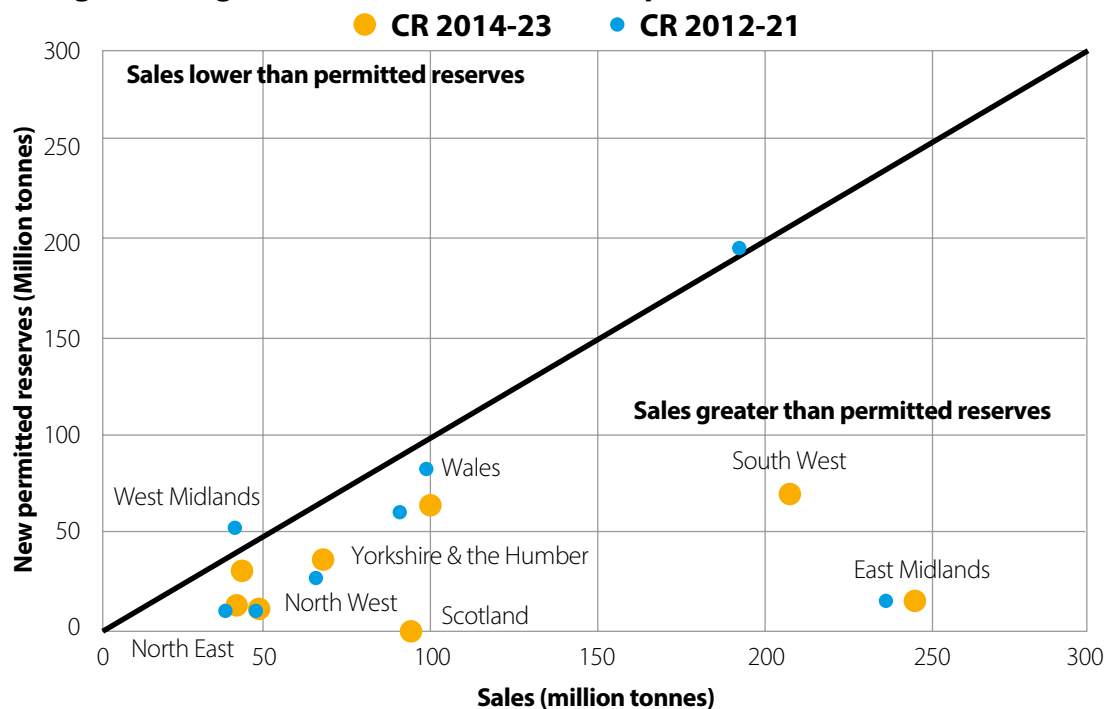
Note: 2007, 2011 and 2012 dominated by major individual consents

Figure 3: Regional sales volumes and new permitted reserves of sand & gravel



- New permitted reserves include land-won aggregates only. The sales data include marine sand & gravel. This difference primarily affects the comparability in the South East, and to a lesser extent, the South West.
- Tonnes for the North East have been removed for confidentiality.
- London has been removed from the comparison due to marine sand & gravel landings dominating sales.

Figure 4: Regional sales volumes and new permitted reserves of crushed rock



- Tonnes for London, the South East and the East of England have been removed for confidentiality.



SURVEY SCOPE AND BACKGROUND

AMPS 2023 is the latest in a series of reports produced by the Mineral Products Association (MPA), informed by a survey of the planning activities of the membership across Great Britain during 2023.

The objective of the survey is to provide a regular overview of the performance of mineral planning processes across Great Britain. These support the delivery of the permitted reserves which ultimately underpin and sustain the minerals industry and those activities that rely on it, primarily construction and manufacturing. Other reports produced by the MPA evidence the sustainable development performance of the industry, the contribution it makes to the UK economy, the contribution of recycled and secondary materials to aggregates supply, and other industry achievements in relation to quarry restoration and biodiversity.

Some of the data reported relate only to construction aggregates, which represent by

far the largest element of mineral extraction and supply in Great Britain.

The planning application statistics relate to all planning applications submitted by MPA members for aggregates and other minerals including high PSV roadstone, and industrial materials such as industrial limestone, industrial clay, dimension stone and industrial sand. It includes mineral-bearing applications (for new sites and extensions of area or depth), ROMP applications and Section 73/42 including time extensions to existing sites.

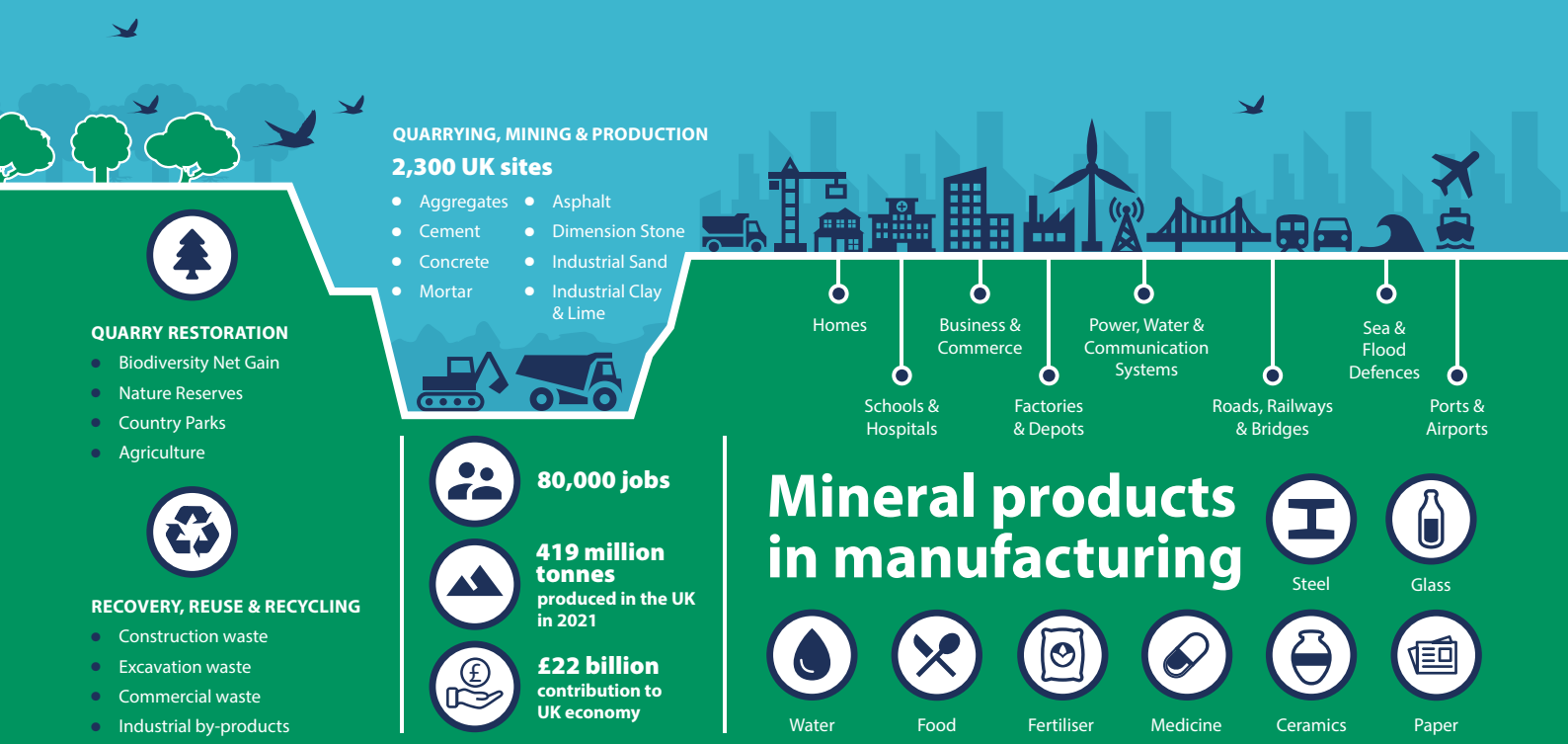
Each figure sets out the scope of the information that is presented and the variations between the topics reflect the historical data that can be drawn upon.

This is principally because the AMPS report is continually evolving in response to feedback received and what information is available. Consequently, some data has only been collected relatively recently, whilst other data goes back to the 1990s. The overall objective is to produce a document which is useful to all those involved in planning for minerals, primarily aggregates.

Further reading

- <https://mineralproducts.org/Sustainability/Reporting.aspx>
- <https://mineralproducts.org/Publications/Communicating-Industry-Value.aspx>
- <https://mineralproducts.org/Publications/Resource-Use.aspx>
- <https://mineralproducts.org/Publications/Natural-Environment.aspx>

Mineral products in construction





MINERAL PLANNING OVERVIEW

The Managed Aggregate Supply System in England is still struggling to perform in the absence of updated National and Sub-national Guidelines for aggregates provision that provide a clear and strategic statement of future demand and needs for construction aggregates.

The Department for Levelling Up Housing and Communities (DLUHC) – recently renamed the Ministry of Housing, Communities and Local Government (MHCLG) – has organised two National Aggregate Co-ordinating Group (NACG) meetings in the past 6 months, after a multi-year hiatus. From this, a task and finish group has been formed to consider the refreshing of National and Sub-National Guidelines on future provision and how they might be disseminated to mineral planning authorities.

From an industry perspective, accurate and up-to-date data is essential for planning and ensuring a steady and adequate supply of materials, and thus the effectiveness of the MASS.

The most recent Guidelines for aggregates provision in England, which were published in 2005 and subsequently updated in 2009, covered the period 2005 to 2020. These set out overarching figures for provision for land-won mineral production over this period, alongside assumptions for the contributions from other sources of supply, including marine sand and gravel, secondary and recycled sources, and imports. Without up to date Guidelines, there is an absence of any strategic assessment of future needs and

benchmarks against which local planning, including Local Aggregates Assessments (LAAs), can be measured. This creates a risk of under-provision arising from local subjectivity and interpretation around what constitutes future 'need'.

The reliance on LAAs to determine local needs remains flawed, given that many LAAs do not include projections of demand (as required by national planning guidance), instead relying on past trends in sales. This results in an approach that looks backward to plan forward and creating uncertainty for industry that is required to commit to significant long-term investment for new mineral developments. There remains an urgent need to produce revised National and Sub-national Guidelines for aggregates provision, effectively providing a clear, forward-looking national 'statement of need' for aggregates.

A key consideration for effective mineral planning remains the intra- and inter-regional supply of material – given the location of geological resources can often be distant from the main centres of demand and consumption. Although LAAs are meant to try to address these issues, the absence of data and resource constraints within mineral

planning authorities mean that in practice this cannot be done on a consistent or comparable basis. As a default, it is generally assumed by local planning authorities that historic supply patterns will continue despite evidence suggesting otherwise.

The AMPS 2023 report has examined reserves and sales for both sand and gravel and crushed rock, on a regional basis, using the 10-year average (see Figures 3 and 4). This clearly shows that reserves in the traditional supply areas, such as the East & West Midlands, North West, South West and South East, continue to be under increasing pressure as the quantity of new reserves permitted remains below sales, resulting in the reserve base of available aggregate minerals continuing to reduce.

A sound and consistent evidence base approach to aggregate minerals is essential to realise the ambitions around housing delivery of the new incoming Government as well as support the delivery of wider green energy and wider infrastructure plans. Given the characteristics of both the minerals that are produced and the construction sector that is being supplied, the basic premise of 'plan, monitor and manage' to ensure a steady and adequate supply of minerals requires long term coordination and support from central Government.

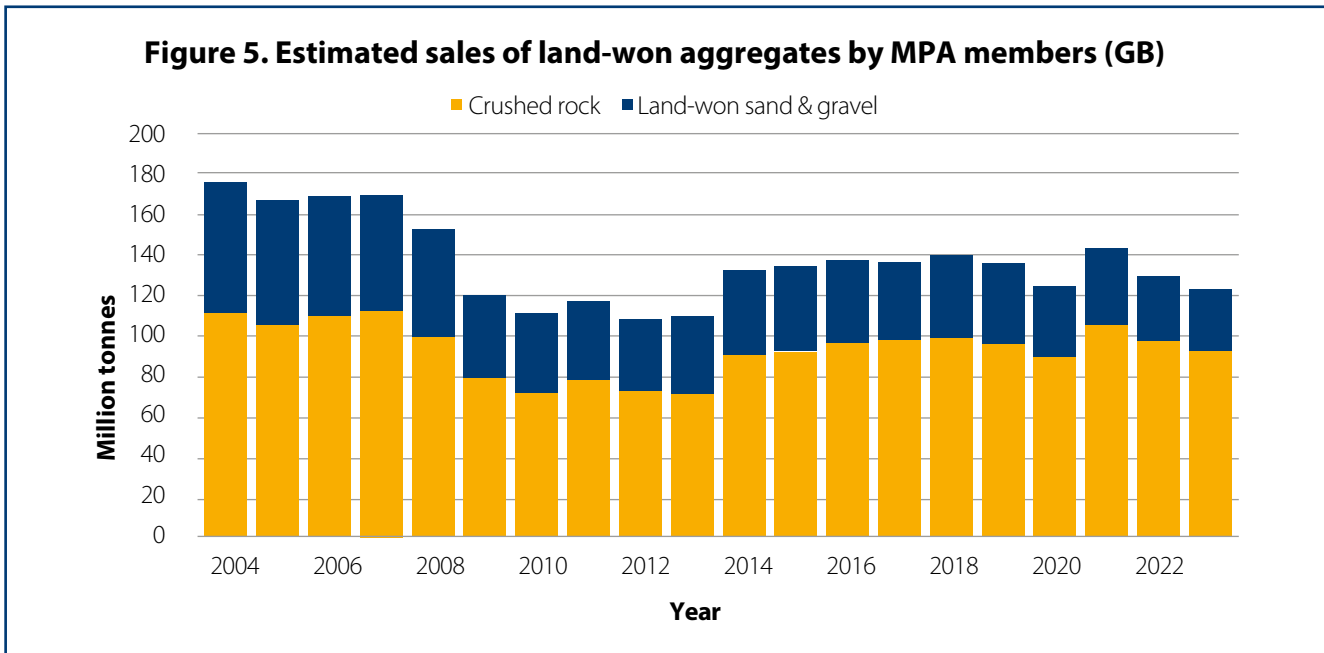
The availability and supply of essential minerals must not be assumed.



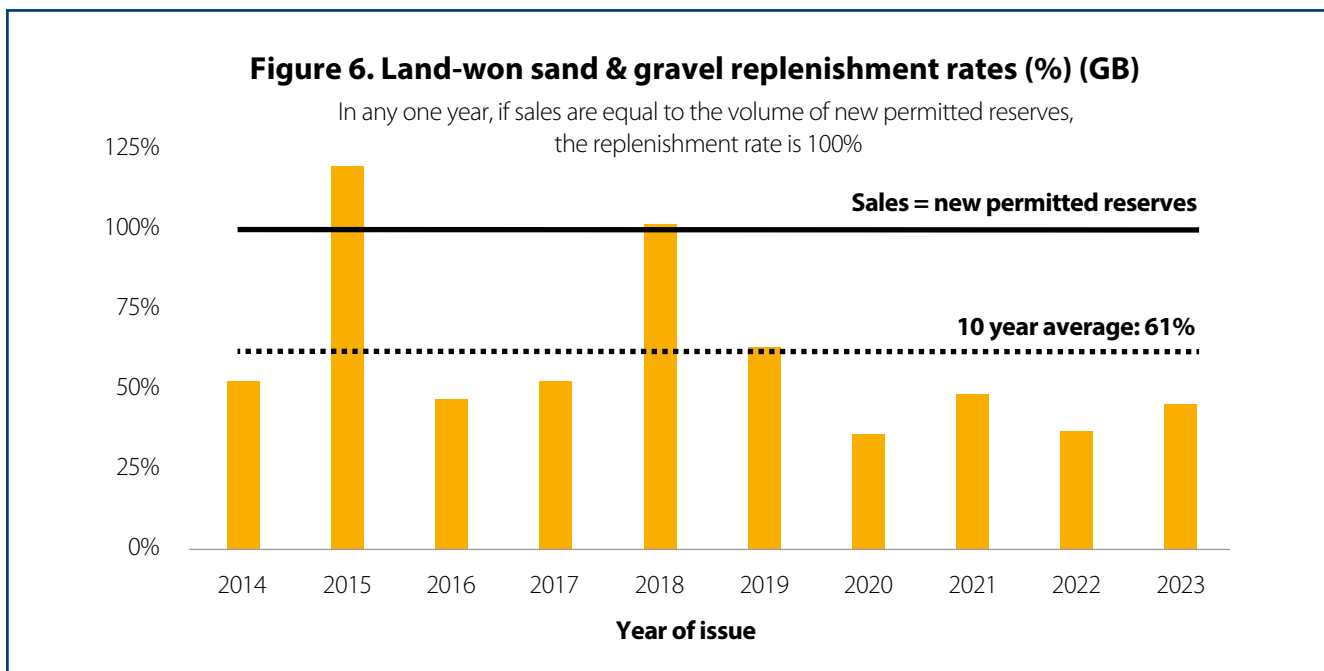


1. SALES

Figure 5 has been derived from land-won sales data provided by MPA members. MPA producer members typically represent 90% of the total GB primary aggregates market, including both land-won and marine aggregates. The chart shows that land-won primary aggregate sales decreased by 5.3% in 2023 following on from an 8.9% fall in 2022. Sales in 2023 were 13.7% lower than in 2021, down from 141.9Mt to 122.4Mt. Sales volumes in 2023 were the lowest since 2013.



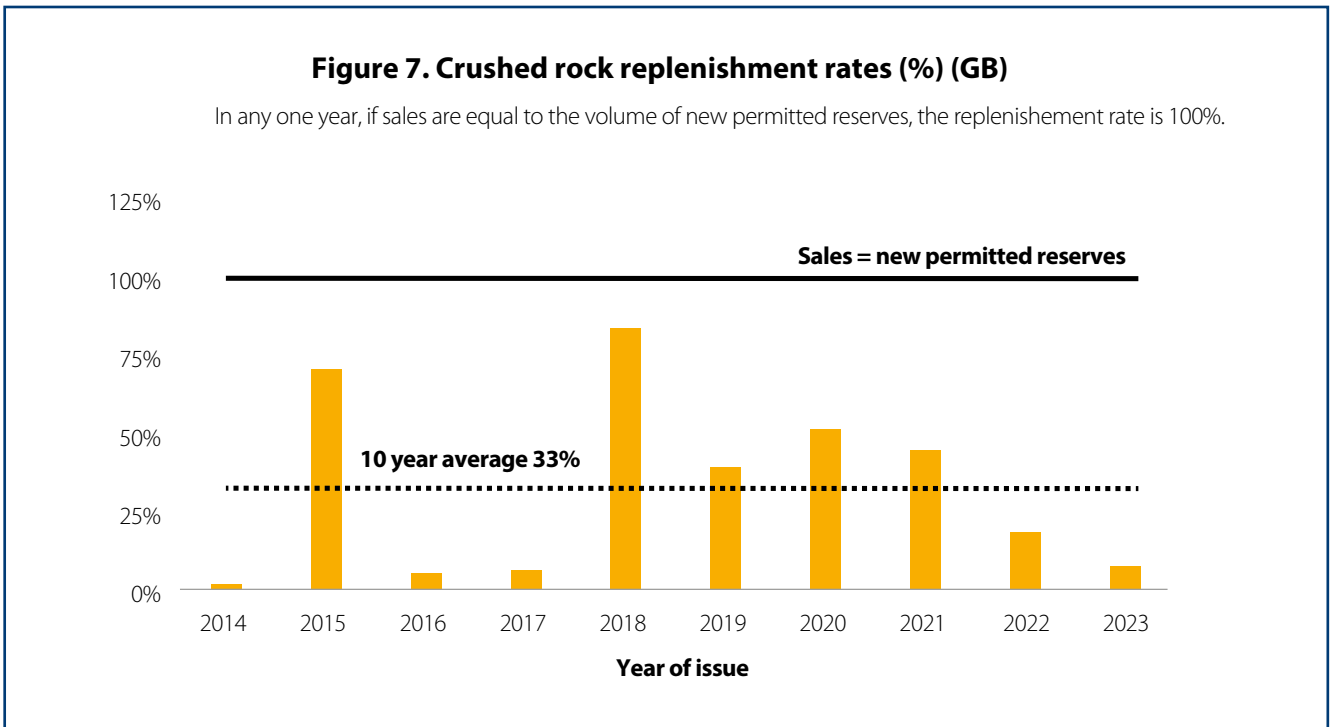
During 2023, only 45% of annual land-won sand and gravel sales were replaced by newly permitted reserves. Long-term replenishment rates for land-won sand and gravel also continue to be of concern, with the latest 10-year average remaining at only 61% (see Figure 6). This means that, in the past 10 years, for every 100 tonnes of land-won sand and gravel sold, only 61 tonnes have been replaced with new permitted reserves.





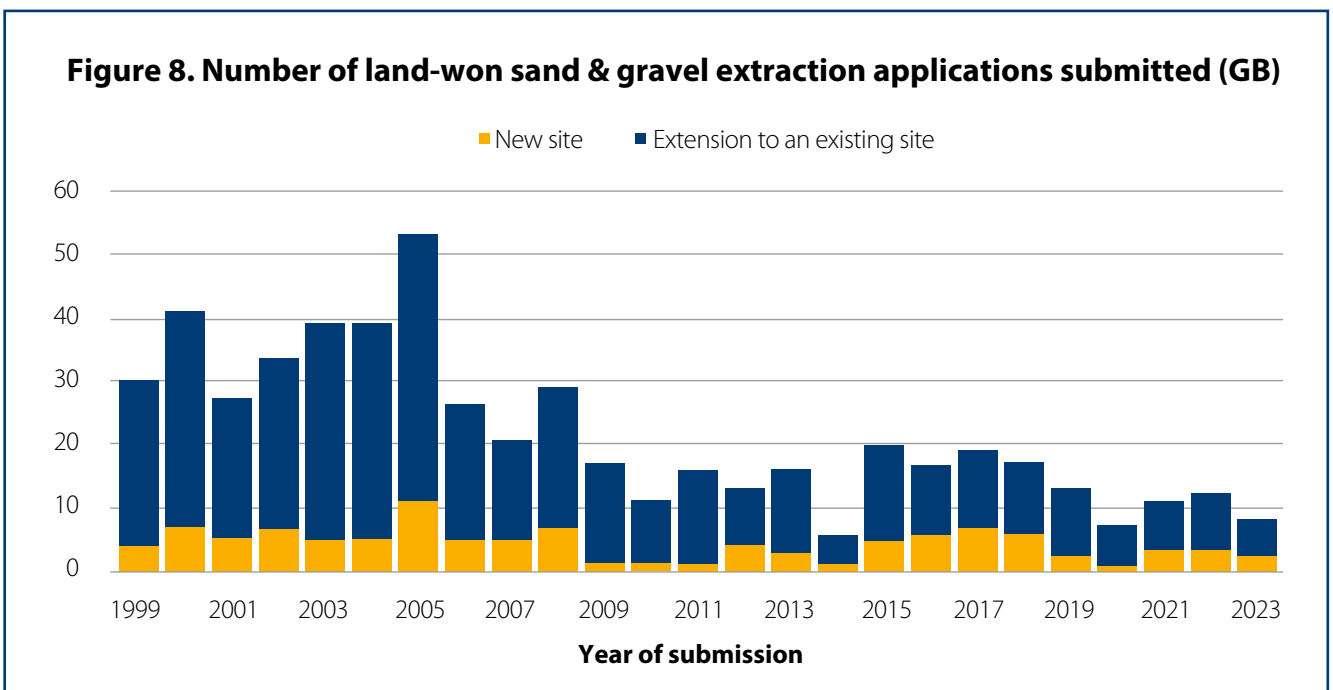
In 2023, 7.4 million tonnes of new crushed rock reserves were permitted, representing 8% of annual sales.

Survey results show that for the tenth year running, annual sales of crushed rock have continued to exceed the replenishment rates reserves. Consequently, the 10-year average replenishment rate for crushed rock currently stands at 33% (see Figure 7).



2. NUMBER OF PLANNING APPLICATIONS

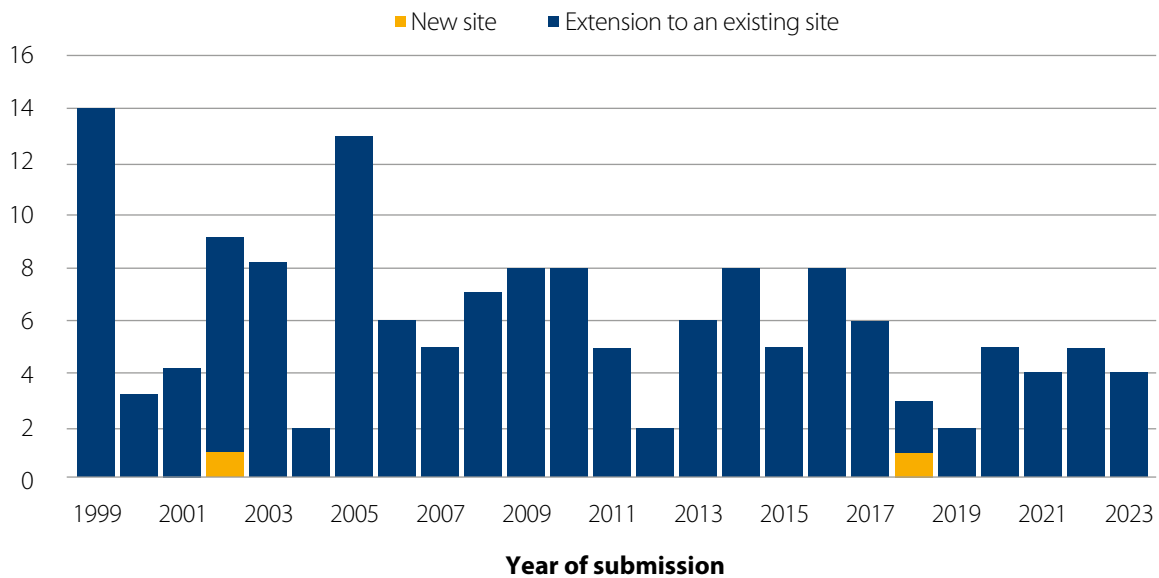
In 2023, 2 applications were submitted for sand and gravel extraction on new greenfield sites, while 6 planning applications were submitted to physically extend existing quarries.





In 2023 there were 4 planning applications to extend existing crushed rock operations submitted. There were no applications for new greenfield sites.

Figure 9. Number of crushed rock extraction applications submitted (GB)



3. NUMBER OF DETERMINATIONS

In 2023, 8 sand and gravel planning applications were approved and 1 refused with 2 withdrawals. For crushed rock, 4 applications were approved in 2021 with no refusals or withdrawn applications.

4. REGIONAL RESERVES AND DEMAND

An analysis of sales versus newly permitted reserves has been undertaken for both sand and gravel and crushed rock using the latest 10-year average data for each region (see Figures 3 and 4). The outputs continue to illustrate the challenge that some of the regions responsible for national supply are facing in maintaining their reserve base despite recent reductions in the levels of ongoing demand. Over the latest 10-year period (2014 -23) the sales of sand and gravel exceeded the volumes of newly permitted reserves in six of the nine geographic areas for which data is reported (seven English regions, Wales and Scotland). In the South East, the largest producing region, the volume of sand and gravel sales during 2014-23 was almost three times higher than that of new permitted reserves. Over the same period the volume of crushed rock sales exceeded the volume of permitted reserves in all nine geographic areas for which data has been reported, with the replenishment rate deteriorating most noticeably in the South West. In the East Midlands, the largest producing region by sales, over the latest 10-year period of 2014-2023 the volume of crushed rock sales was almost 18 times higher than that of new permitted reserves.

Given the continued demands required to support the delivery of the nationally significant infrastructure programme, housing and commercial developments this situation needs to be urgently addressed by government. Alongside the need to revise the Guidelines for aggregates provision to incorporate the additional demands that exist, the transparency and visibility of the material demands created by infrastructure projects and major housing developments should require projects to prepare an upfront mineral resource assessment and supply audit as part of the planning and consenting process for the scheme. In turn, this would support both mineral planning authorities and the mineral industry to forward plan for future demand requirements, as well as increasing awareness of the material demands required to support major projects within central Government.



5. TIME TAKEN TO OBTAIN PLANNING PERMISSION

Figures 10 and 11 show the time taken to complete each stage of the overall planning process required to secure a mineral planning permission. In 2023 it took on average 22.6 months for a sand and gravel application to be approved and issued and 36.6 months for crushed rock.

The average time (2014-2023) for a permission to be issued is 28.5 months for sand and gravel and 28.8 months for crushed rock. It is important to note, though, that the determination phase represents just one part of a wider site development process that can take 10 to 15 years to complete.

Figure 10. Average time to obtain a sand & gravel extraction planning permission (GB)

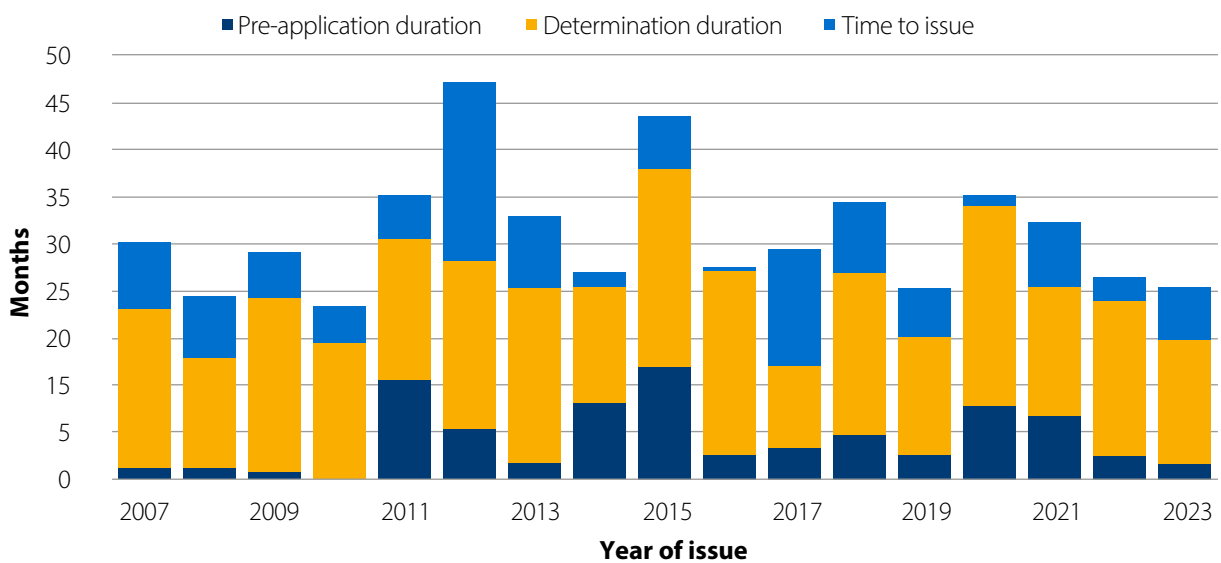
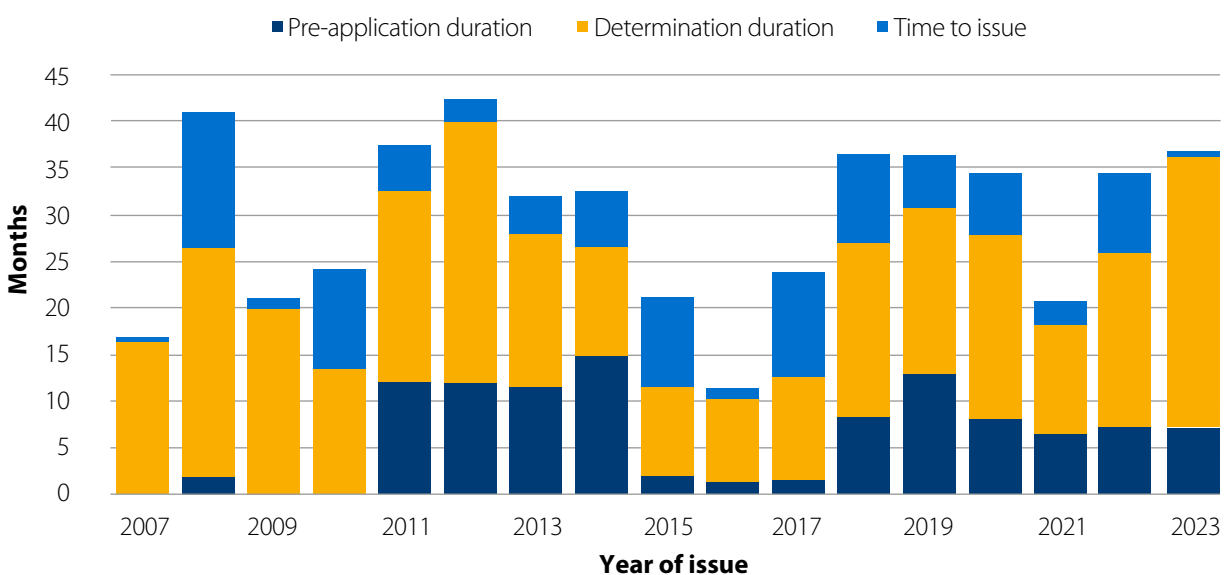


Figure 11. Average time to obtain a crushed rock extraction planning permission (GB)





6. ALLOCATED VERSUS UNALLOCATED SITES

Figure 12 shows that for the period 2014 to 2023, 32% of the permissions granted for extraction of minerals were not identified/allocated sites in an adopted Minerals Local Plan.

7. PLANNING OFFICER RECOMMENDATIONS

For planning permissions issued over the period 2014-2023, 88% were issued following an officer's recommendation for approval. It is likely that a high proportion of the remaining balance may also have had officer support.

Figure 12. Local plan status for land-won aggregates permissions issued, 2014-23 (GB)

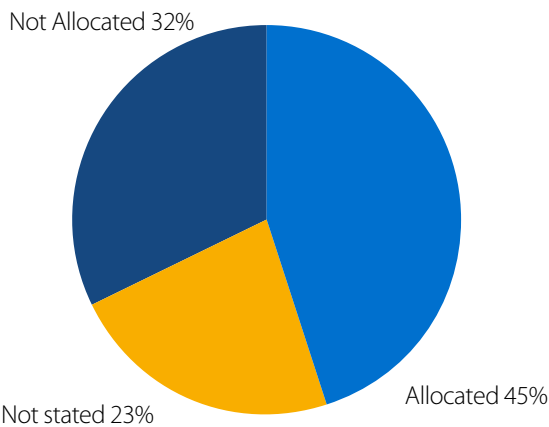


Figure 13. Officer recommendation for land-won aggregates permissions issued, 2014-23 (GB)

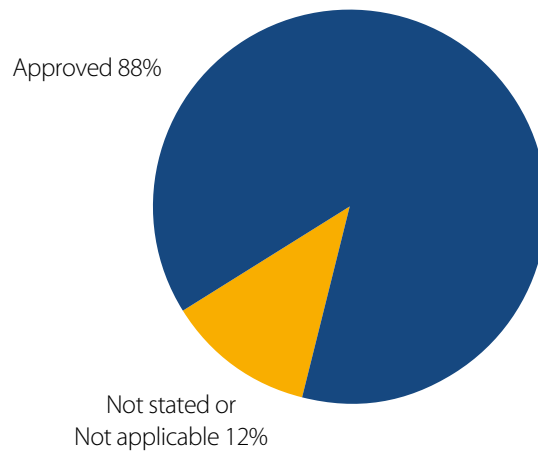
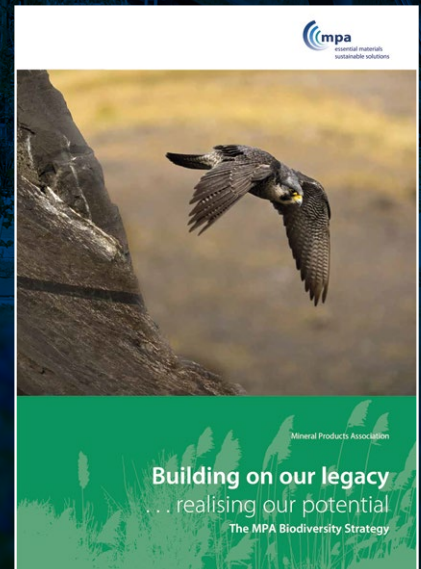
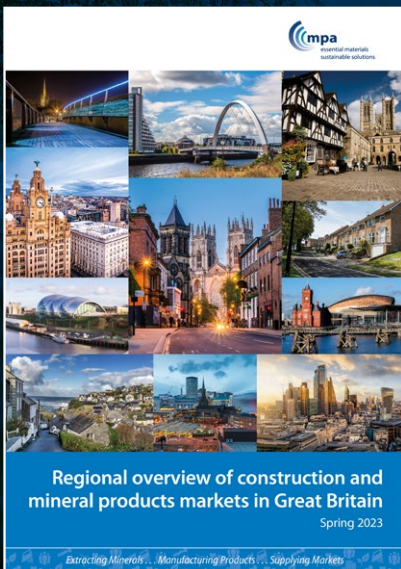
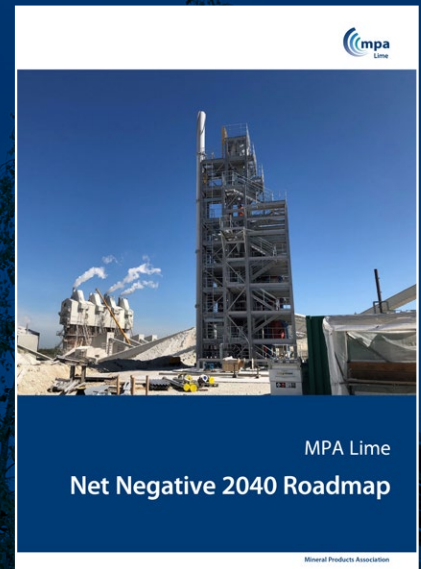


Table 1: Metrics for planning authority approvals, permissions issued only, during 2014-23

Material	SAND & GRAVEL		CRUSHED ROCK		Total
	New	Extension	New	Extension	
Type of site	New	Extension	New	Extension	All
No. of approvals	19	87	1	39	146
% of total GB	13%	60%	1%	27%	100%
Tonnage approved ('000t)	36,625	181,250	2,100	293,495	513,470
% of total GB	7%	35%	0%	57%	100%
Area covered (Ha)	948	4,498	32	1,526	7,004
% of total GB	14%	64%	0%	22%	100%
Tonnage ('000t) per approval	1,928	2,083	2,100	7,526	-
Tonnage ('000t) per Ha approved	20	19	32	26	-

Note: Computations are based solely on MPA members' returns where both the tonnage and the area information were provided.



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

For further MPA information visit www.mineralproducts.org

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