



AMPS 2025

12th Annual Mineral Planning Survey Report



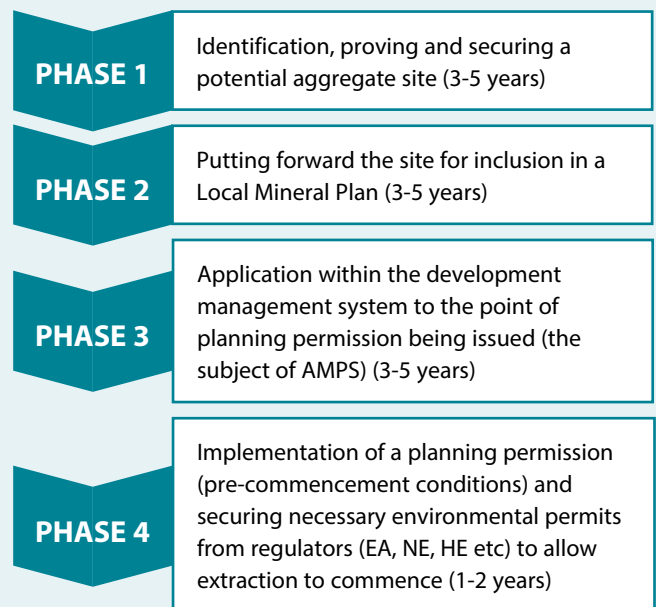
Introduction

The 2025 Annual Mineral Planning Survey (AMPS 2025), reports on mineral planning data for 2024 and 2025 collected from producer members of the Mineral Products Association.

This document sets out how Britain's mineral planning is failing to plan ahead for a sufficient and timely supply of minerals. The analysis shows that the rate at which new reserves of sand, gravel and crushed rock are being permitted or replenished to replace sales continues to fall across Great Britain. This ongoing reduction in the long-term reserve base upon which the minerals industry and downstream sectors depend means that, even at a time of lower sales, the industry will continue to need new permissions to maintain a sufficient and timely supply of minerals which are essential for delivering the housing, infrastructure, manufacturing and industrial developments that society needs.

The survey also confirms that, in spite of some small improvements in determinations in 2025, the 10 year average determination period for mineral planning applications remains at over two years while for ROMPs¹ the average is over 3 years. It must also be remembered that the determination phase is just one of a number of stages that needs to be completed to get to a point where a new site is operational and producing mineral. These can include surveys and economic analyses, land assembly/agreements, local plan allocation, pre-application

discussions, preparation of the application, discharge of conditions, legal agreements, and implementation of the permission. Consequently, it can take 10-15 years to bring forward new reserves – reinforcing the point that mineral planning is a long-term issue that has to be strategically managed in order to ensure a sufficient and timely supply.



THE KEY FINDINGS OF THE REPORT ARE:

Sales

- Sales of crushed rock and land-won sand and gravel declined by 1% in 2025, following a 1.4% fall in 2024.
- At 122Mt, sales of primary aggregates in 2025 were the lowest since 2013, and even below Covid-impacted 2020 levels.
- In 2025, 12.2Mt of new sand and gravel reserves were permitted, well below the long-term average of 26Mt since 1999.

Replenishment rates for 2016-25

The long-term replenishment rate is a key indicator of the resilience of domestic mineral reserves and compares the relationship between sales which reduce the reserve base and new permissions which replenish it.

- Sand and gravel sales have exceeded new permissions every year over the past decade, resulting in the replenishment rate falling to 49% (down from 57% in 2023).
- Crushed rock sales have now exceeded new permissions for 13 consecutive years resulting in a replenishment rate of 32% (down from 36% in 2023).
- The last decade (2016-25) has seen sand and gravel sales exceed new permitted reserves in all GB regions and devolved administrations.

- Over the same period, crushed rock sales exceeded new permitted reserves in all regions except the North West.
- In the East Midlands (the largest producing English region), crushed rock sales were almost 24 times higher than new permitted reserves.

Planning applications

- There were 53 planning applications submitted in 2025, in line with the long-term average of 52 per annum.
- Of these, 15 were for new reserves: 6 for sand and gravel, 5 for crushed rock, 2 for High Specification Aggregate², and 2 for soft sand.
- Of the 6 sand and gravel applications: 3 were new applications and 3 were for site extensions.
- All crushed rock applications were for extensions to existing sites rather than new sites.
- Over 2016-25, the average time required for determining individual planning applications remained steady at 26.8 months for sand and gravel and 27.1 months for crushed rock. The 10-year average for determining a crushed rock Review of Old Mineral Permission (ROMP) application was 38.3 months.



1. Mineral planning overview

Minerals supply is a strategic matter and needs to be planned for as such. Minerals can only be extracted where they occur and the underlying geology of Great Britain will determine the local availability. As such resources are not distributed evenly so some inter-regional movement is necessary to ensure that minerals can be supplied to where they are needed.

Crushed rock represents the largest inter-regional flow, reflecting the overall demand for these versatile materials and the absence of significant hard rock resources in London, the South East and East of England.

The East Midlands is the largest mineral producing English region at 31.9 Mt which is 22% of total land sourced crushed rock sales in England and Wales, closely followed by the South West with 26.4 Mt and 18% respectively. This highlights the nationally important role these two regions play in minerals supply; they are also the leading regions for exporting crushed rock (13.2 Mt and 8.3 Mt respectively). London, the South East, East of England, West Midlands and the North West are the regions most heavily dependent on imports³.

For land won sand and gravel, whilst the production tonnages are smaller, high levels of inter-regional movements still take place alongside the significant role that imports of marine sand and gravel play in supplying London and the South East.

The significance of these inter-regional flows, particularly into urban areas, reinforces the importance of safeguarding minerals infrastructure, such as rail depots and wharves: 22.5 Mt (13.5%) of primary aggregates were brought to Great Britain by sea, and 25 Mt (15%) of all primary aggregates were distributed within Britain by rail or water to their point of use⁴.

Mineral planning is therefore of relevance to all areas whether that is as producers or consume

Given nearly 80% of domestic aggregate sales in GB originate from England, the continuing absence of any progress or commitment from Government to update the *National and Sub-national Guidelines for aggregates provision*, which expired in 2020, coupled with local government reorganisation in England moving to system of unitary councils, means the mineral planning system is at a crossroads.

Without updated *National and sub-national Guidelines*, there is an absence of any strategic assessment of future demand for

minerals and benchmarks against which local planning delivery in England, including Local Aggregates Assessments (LAAs), can be prepared and measured. This creates the significant risk of under-provision arising from local subjectivity and interpretation around what constitutes future demand and need, particularly when this may arise outside of the mineral planning authority area. This is important as the MPA report on *Aggregates Demand and Supply in Great Britain: scenarios for 2035*⁷ identified that between 3.8 and 4.1 billion tonnes of primary, secondary and recycled aggregates will be required between 2022 and 2035 to meet construction demand in Great Britain. This will require the planning for new land won resources, as the report also identified that imports, recycled and secondary aggregates are unlikely to be able to fill the gap.

With local government reorganisation, experience would suggest there is a serious risk that specialist minerals planning teams will become more fragmented or even lost altogether.

This all impacts on the ability of both the industry and mineral planning authorities to plan strategically for the new mineral reserves that will be needed to meet future demand and to halt and reverse the decline in the long-term reserve base. Added to this is the current backdrop of weak short term construction markets, rising operating costs, a rising cumulative tax and regulatory burden on the industry, and a mineral planning service which still has a long-term average of over two years to deliver a mineral planning permission.

The minerals industry has an essential role to play in delivering the Government's ambitions, from house building to clean energy, but Government action is needed to make sure the mineral planning service is fit for purpose with the following steps:

1. The adoption of positive national mineral planning policies in the new National Planning Policy Framework (NPPF) which require plans and decisions to facilitate the extraction and processing of all minerals;
2. Updated National and Sub-national Guidelines for aggregates provision to be in place by 2028; and
3. The creation of specialist regional or sub-regional hubs for mineral planning to retain and strengthen specialist mineral planning teams and support the delivery of strategic planning for minerals in a cost-effective manner.

References:

¹ ROMP means Review of Old Mineral Permission.

² High Specification Aggregates (HSA) used in the construction and maintenance of road surfaces with the need for higher levels of skid-resistance are specialised products available from a limited number of sources.

³ Collation of the Results of the 2023 Aggregates Minerals Survey for Great Britain, British Geological Survey 2025.

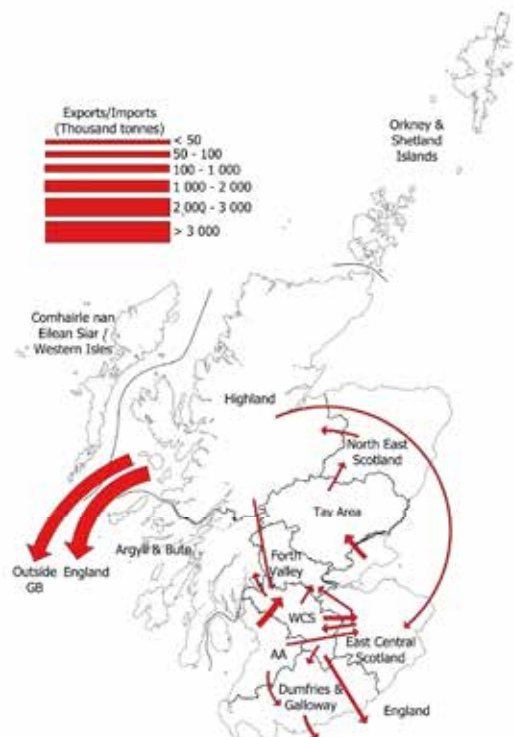
⁴ Collation of the Results of the 2023 Aggregates Minerals Survey for Great Britain, British Geological Survey 2025.

⁵ Collation of the Results of the 2023 Aggregates Minerals Survey for Great Britain, British Geological Survey 2025.

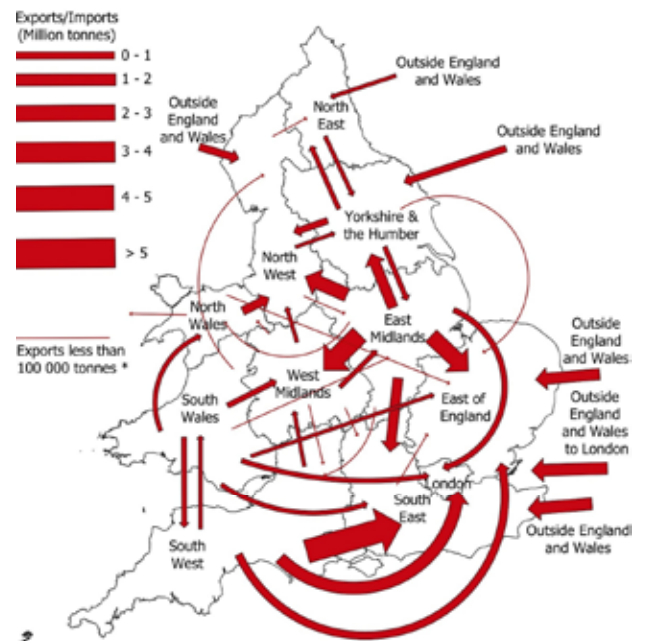
⁶ Collation of the Results of the 2023 Aggregate Minerals Survey for Great Britain, British Geological Survey (2025).

⁷ https://mineralproducts.org/MPA/media/root/Publications/2022/Aggregates_demand_and_supply_in_GB_Scenarios_for_2035.pdf

Inter-regional flows of crushed rock across GB, 2023 (BGS, 2025⁵)

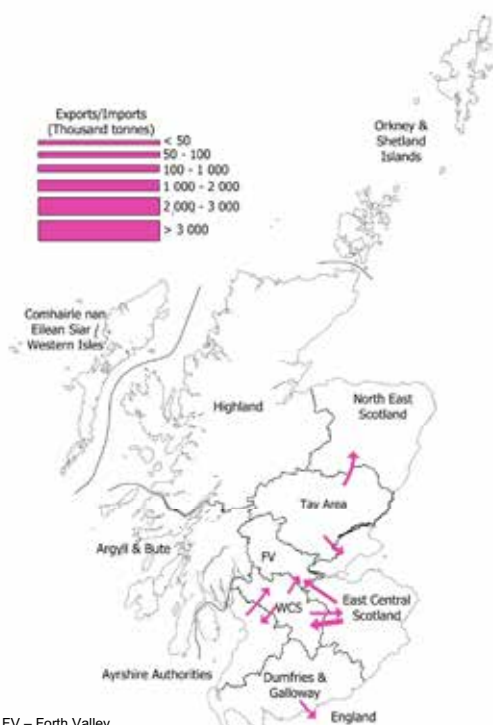


AA – Ayrshire Authorities
WCS – West Central Scotland
For clarity exports/imports less than 25 000 tonnes are not shown.

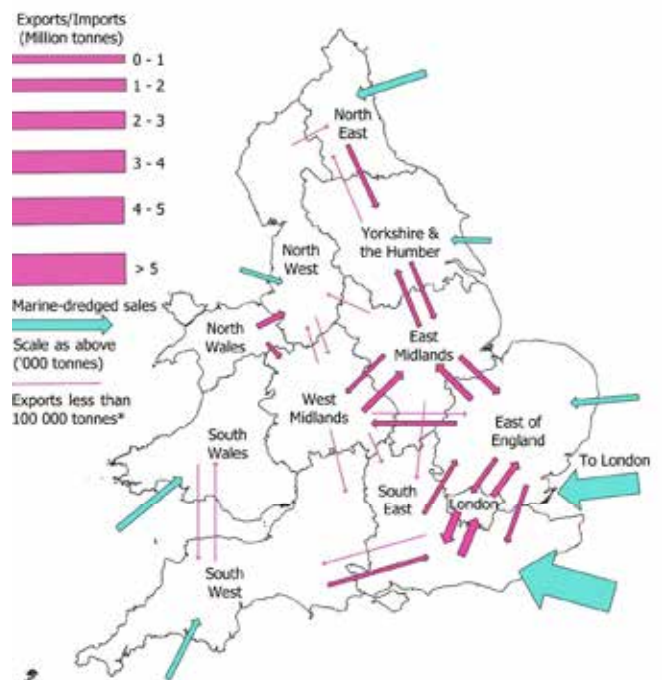


*For clarity exports/imports less than 25 000 tonnes are not shown.

Inter-regional flows of sand & gravel across GB, 2023 (BGS, 2025⁶)



FV – Forth Valley
WCS – West Central Scotland
For clarity exports/imports less than 25 000 tonnes are not shown.



*For clarity exports/imports less than 25 000 tonnes are not shown.



2. Survey scope and background

The **2025 Annual Mineral Planning Survey (AMPS 2025)** and is the latest in a series of reports produced by the **Mineral Products Association (MPA)** and is informed by a survey of the planning activities of the membership across **Great Britain** during **2024/5**.

The objective of the AMPS survey is to provide an overview of the performance of the mineral planning processes taking place across Great Britain. These support the delivery of the permitted reserves which ultimately sustain the minerals industry and those downstream industries and activities that rely on it, primarily construction and manufacturing. AMPS 2025 compliments other reports produced by the MPA which 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 wider planning application statistics relate to **all** planning applications submitted by MPA members for aggregates (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, Section 73/42 and time extensions to existing sites.

Each figure sets out the scope of the information that is presented, this is 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.





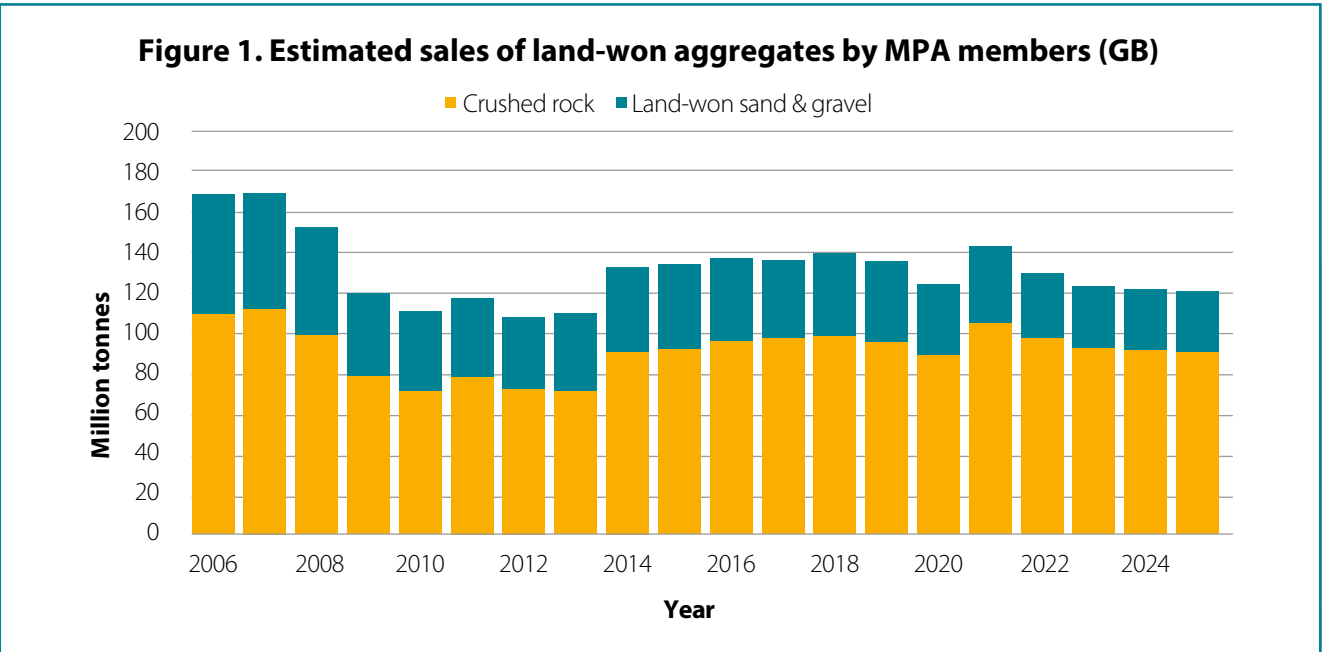
3. Reserve replenishment rates

3.1 Sales

Despite the current low levels of demand, it is clear that new reserves need to come forward as the data on replenishment rates confirm a long-term trend of annual sales exceeding new permissions by a significant margin. If this continues, the ability of the industry to respond quickly to increases in demand in the future may be compromised. Obtaining a mineral permission takes time (10-15 years potentially) and requires significant upfront investment from the applicant. **At times of low demand, the approach to look backwards and rely on the last 10 years of sales to calculate the landbank drives lower LAA production rates which fails to plan for the future economic growth which is the central policy aim of the current Government.** The lack of updated *National and Sub National Guidelines for aggregates provision* to help the industry and mineral planning authorities to plan ahead compounds this problem. This all serves to deter investment in new reserves. The key to breaking this cycle is for the Government to commit to updating the *National and Sub National Guidelines* so they take into account the economic growth that they want to deliver and provide a robust and strategic assessment of need.

Figure 1 has been derived from land-won sales data provided by MPA members. MPA producer members represent c.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 1.4% in 2024 and then by a further 1% in 2025 to 122Mt, which is down from the most recent high of 141.9Mt recorded in 2021. Whilst the rate of decline is slowing from the larger falls seen in 2022/3, sales volumes in 2025 are now at their lowest since 2013, reflecting the depressed state of the construction market and the wider economy more generally.

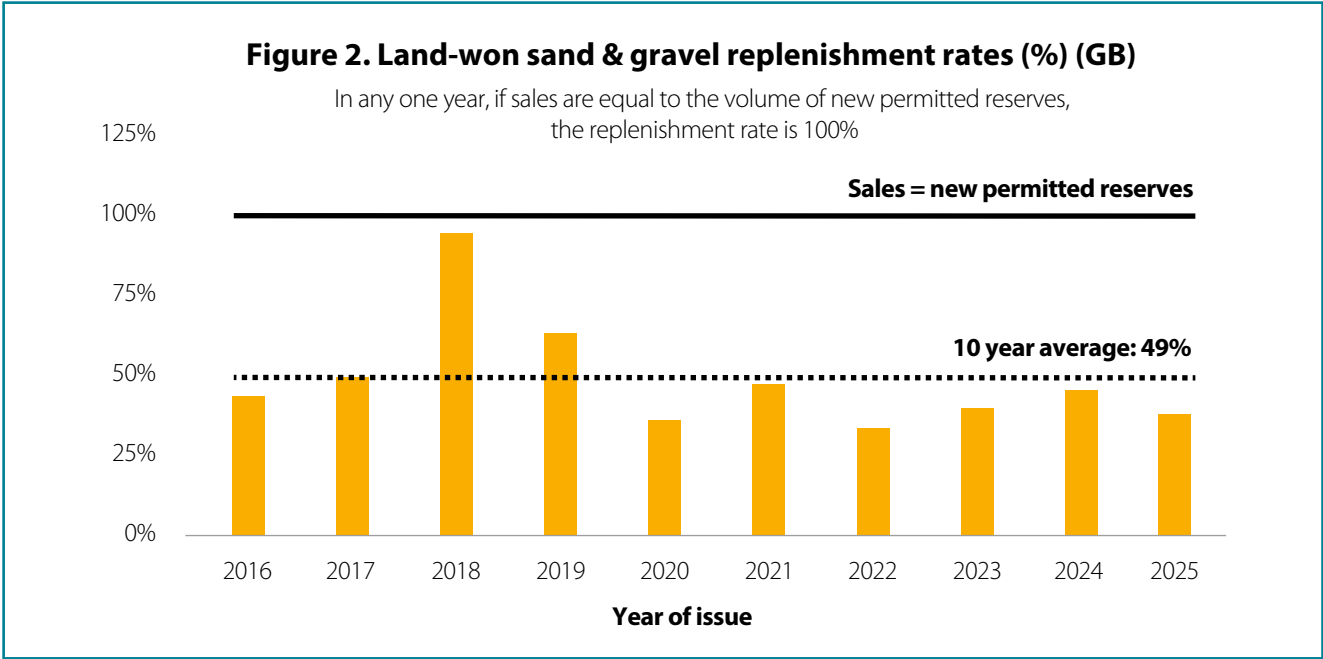




3.2 Sand and gravel reserve replenishment rates

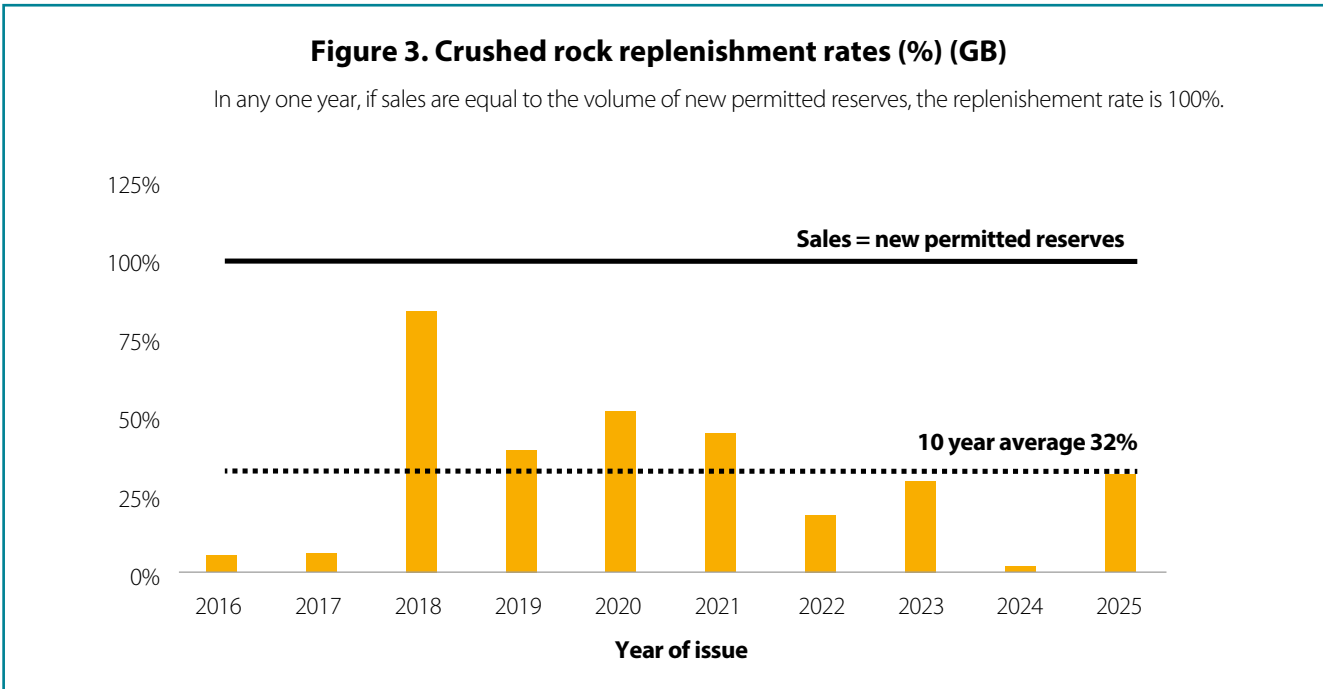
As noted above, even though sales fell during 2025, only 38% of land-won sand and gravel annual sales were replaced by newly permitted reserves and the 12.2Mt of new sand and gravel reserves that were permitted were well below the long-term average of 26Mt a year. As a result, long-term replenishment rates for land-won sand and gravel reserves have now fallen below 50%, with the 10-year average now being only 49% (see Figure 2).

This means that, in the past 10 years, for every 100 tonnes of land-won sand and gravel extracted and sold, only 49 tonnes have been replaced with new permitted reserves.



3.3 Crushed rock reserve replenishment rates

The situation with crushed rock is even more challenging with the replenishment rate for 2025 standing at only 31%, which has further reduced the 10-year rolling average to 32% (down from 36% in 2023). Sales of crushed rock have now exceeded new permissions for 13 consecutive years.





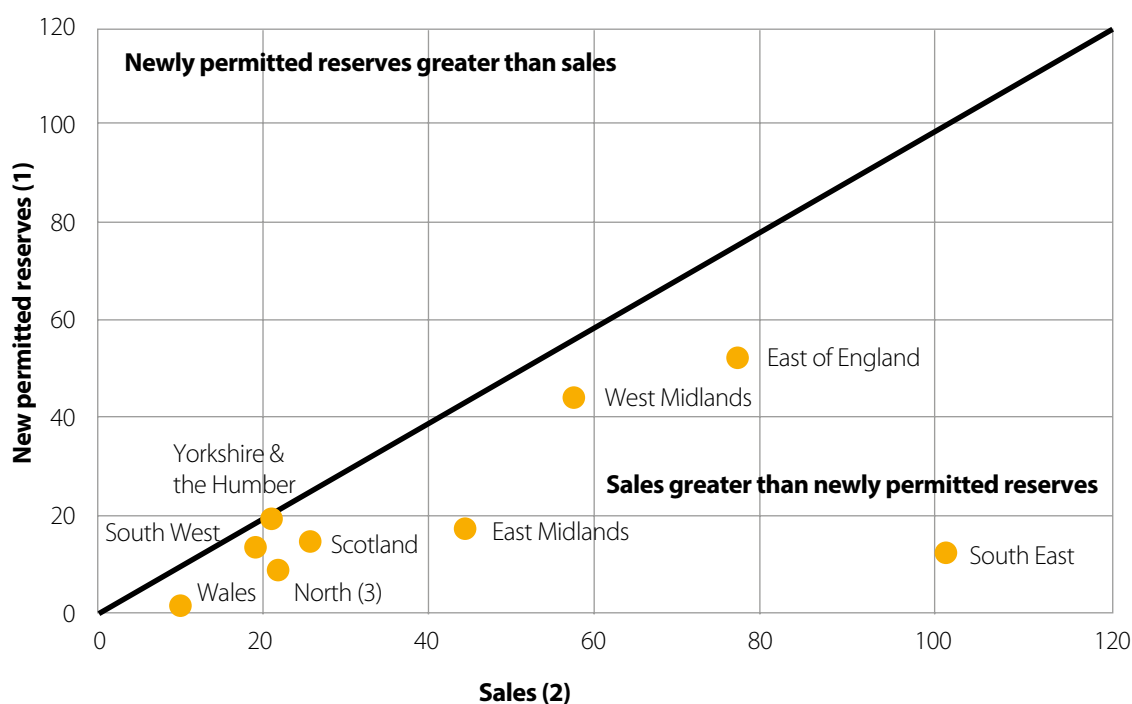
3.4 Regional reserves and demand

Minerals are a strategic resource and flows between regions are needed to ensure the demands from society can be met. Reflecting this, an analysis of sales versus newly permitted reserves has been undertaken for both sand and gravel and crushed rock using the 10-year average data for each region (see Figures 4 & 5).

The outputs continue to illustrate the challenge that many of the regions responsible for national supply are facing in maintaining their reserve base, even with the lower levels of demand being experienced. Over a 10-year period (2016-25) the volumes of sand and gravel sold exceeded the volumes of newly permitted reserves in all regions and devolved administrations in GB. In South East England, the biggest producing region, sand and gravel sales during 2016-25 were almost 9 times higher than the new reserves that were permitted.

In the same period the volume of crushed rock sales exceeded the volume of permitted reserves in all regions and devolved administrations in GB, except the North West, with the replenishment rate deteriorating most noticeably in the East Midlands and the South West. This is important as these two regions are the biggest exporters of crushed rock across the country and are of national importance for minerals supply. In the East Midlands, which is the biggest producing region by sales, crushed rock sales during 2016-25 were almost 24 times higher than the new reserves permitted.

Figure 4. Sales volumes and new permitted reserves of sand & gravel by region and devolved administration in Great Britain, 2016-25 Million tonnes



(1) 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.

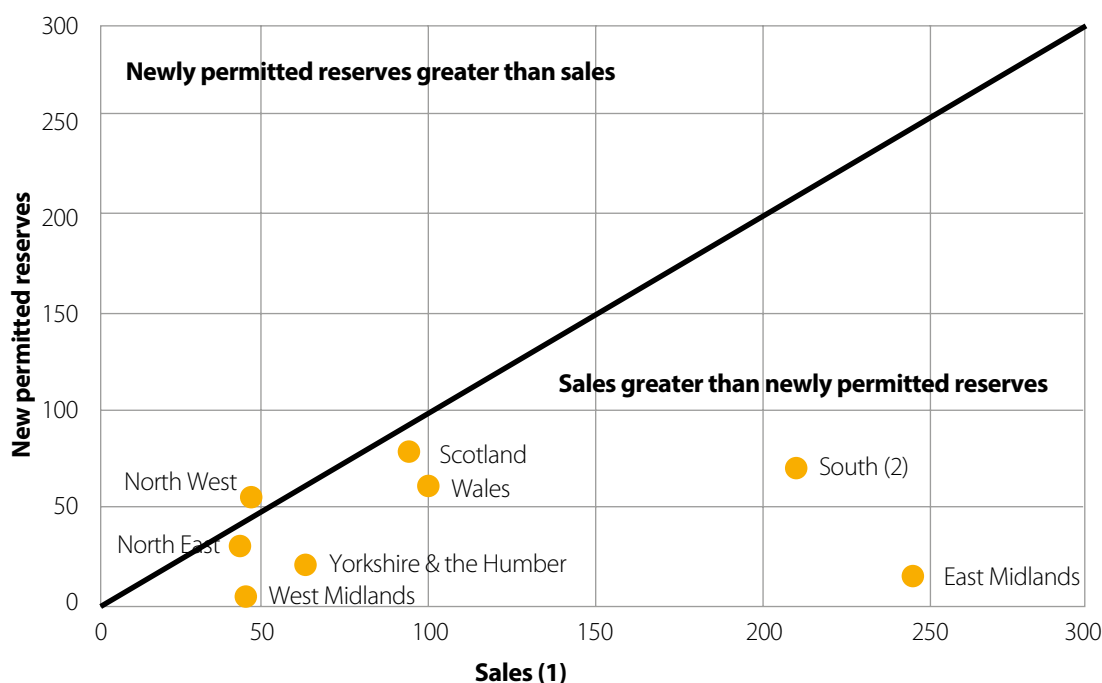
(2) Sales from MPA aggregates producers. Whilst the sample of producers reporting the new permitted reserves cover all MPA members, the sales sample is smaller, marginally under-representing total sales from MPA producers.

(3) Volumes for the North East and North West are combined for confidentiality.

(4) London has been removed from the comparison due to marine sand & gravel landings dominating sales.



Figure 5. Sales volumes and new permitted reserves of crushed rock by region and devolved administration in Great Britain, 2016-25 Million tonnes



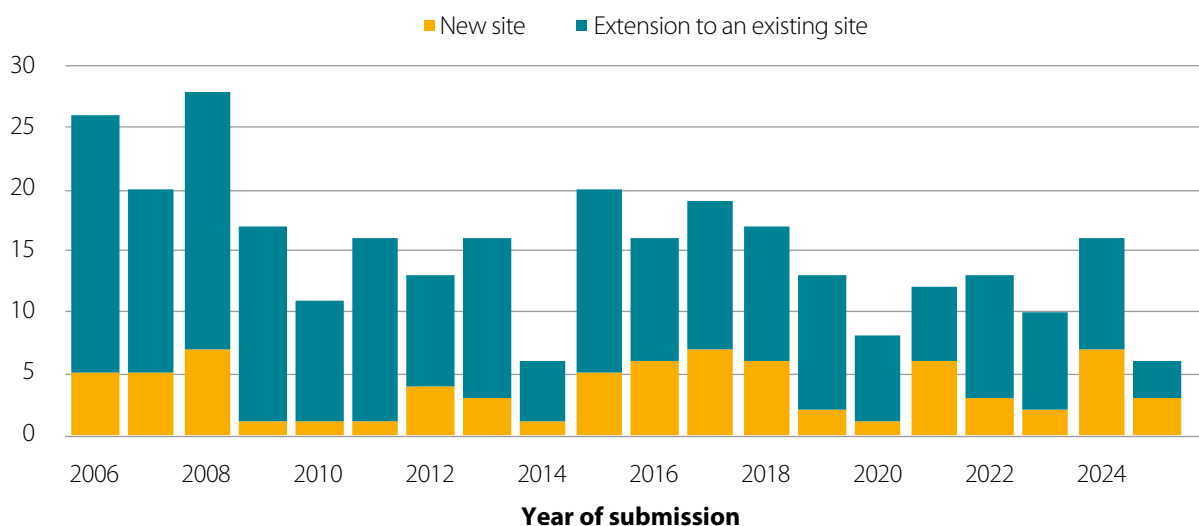
(1) Sales from MPA aggregates producers. Whilst the sample of producers reporting the new permitted reserves cover all MPA members, the sales sample is smaller, marginally under-representing total sales from MPA producers.
 (2) Volumes for the East of England, London, the South East and the South West are combined for confidentiality.

4. Planning applications

4.1 Sand and gravel applications

Over the course of 2024 and 2025, 10 sand and gravel applications were made for new/'greenfield' sites, and 12 applications were made to physically extend existing quarries, see Figure 6.

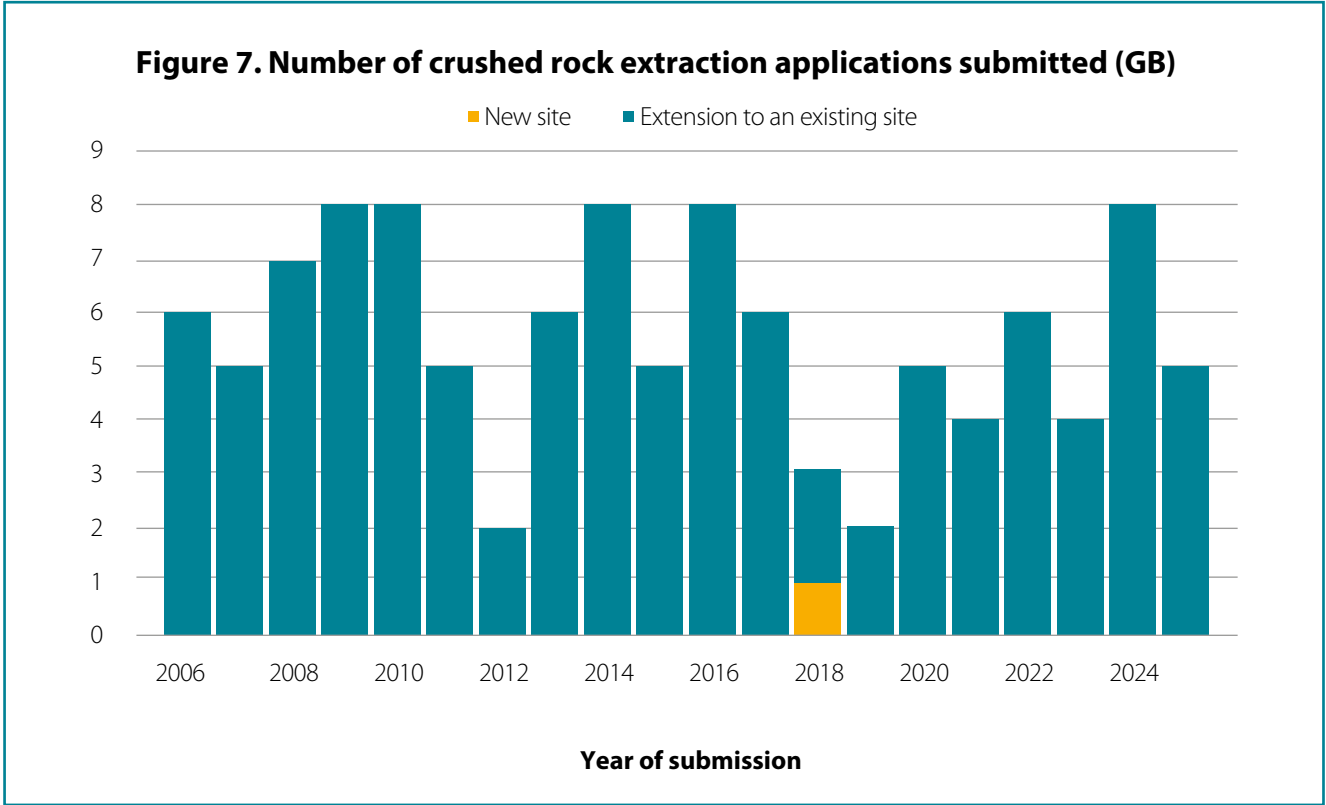
Figure 6. Number of land-won sand & gravel extraction applications submitted (GB)





4.2 Crushed rock applications

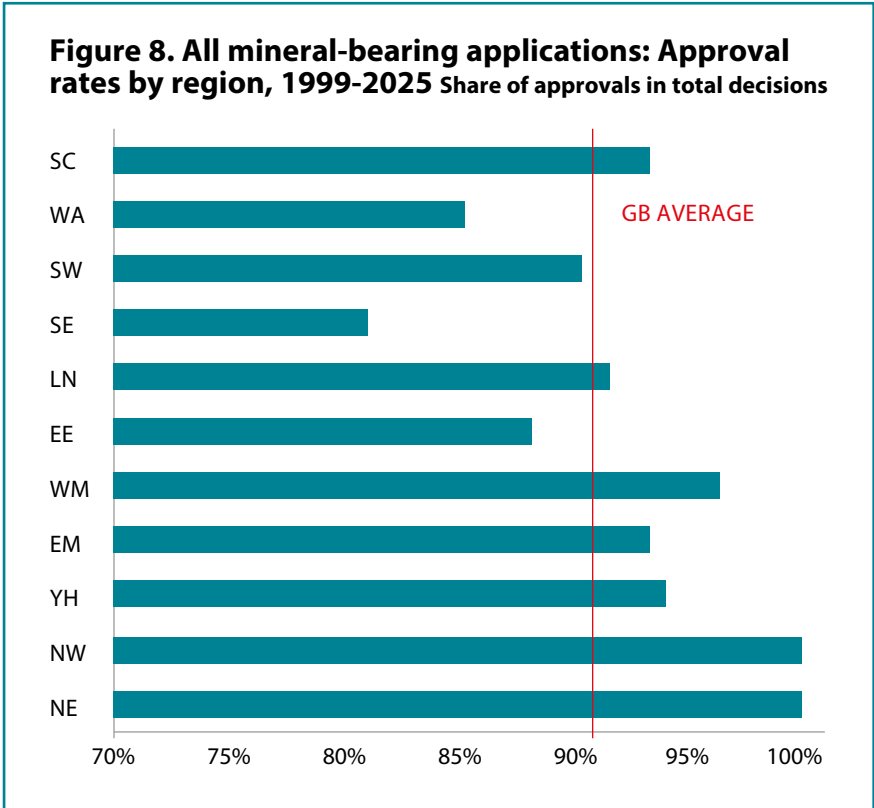
In 2024/5 there were 13 crushed rock extension applications submitted. There were no applications for new sites, see Figure 7.



4.3 Number of determinations

For the two years 2024 and 2025, 16 sand and gravel applications were approved and 1 refused with 1 withdrawal. In respect of crushed rock, 8 applications were approved and 2 were refused.

On average, 90.8% of mineral applications determined between 1999 and 2025 in GB were approved, although there are some significant differences between the regions with the South East only having an approval rate of 81% for example, see Figure 8.





4.4 Time taken to obtain permission

Figures 9 and 10 show the average time taken to complete the overall planning process required to secure a mineral planning permission and also shows the current average determination period over the 10-year period 2016-25. Whilst there has been a slight improvement in handling times in 2025 the 10-year average for both sand and gravel and crushed rock remains over two years.

The 10-year rolling average time (2016-2025) from the commencement of pre-application discussions through to a permission being issued is 26.8 months for sand and gravel and 27.1 months for crushed rock. Breaking this down further shows that the average time from submission of an application to a committee resolution is 16.6 months for crushed rock applications and 17.2 months for sand and gravel and then from resolution to the issuing of a decision the current 10-year average is 5 months for crushed rock and 5.3 months for sand and gravel. This indicates a planning system under pressure not only in the determination phase of the application but also post committee with the completion of legal agreements.

It must also be remembered that the above determination phase is just one of a number of stages that needs to be completed to get to a point where a new site is operational and producing mineral. These include surveys and resource assessments, land assembly/agreements, local plan allocation, preparation of the application, discharge of conditions, legal agreements and implementation of the permission. This is why it can take 10-15 years to bring forward new reserves.

Greater certainty and efficiency in dealing with mineral applications would give the industry greater confidence to invest in what is a long-term process which requires substantial upfront investment.

In addition, the determination timescales are significantly longer than those the Government have set out in their Planning Guarantee, which is the government's policy that no application should spend more than a year with decision-makers, including any appeal. In practice this means that major planning applications should be decided in no more than 26 weeks (6 months).

With a further significant fee increase being consulted on in 2026, it is essential that application fees are spent on improving the planning service as a long-term average of over 2 years to secure a mineral permission is too long and undermines business confidence and deters investment in new mineral planning applications.

Figure 9. Average time to obtain a sand & gravel extraction planning permission (GB) In months

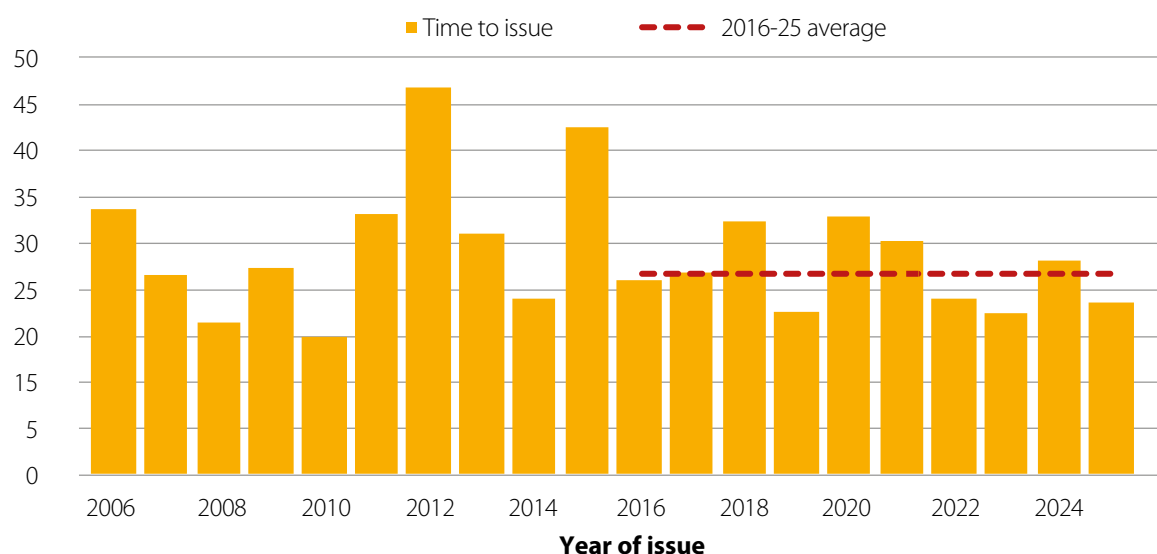
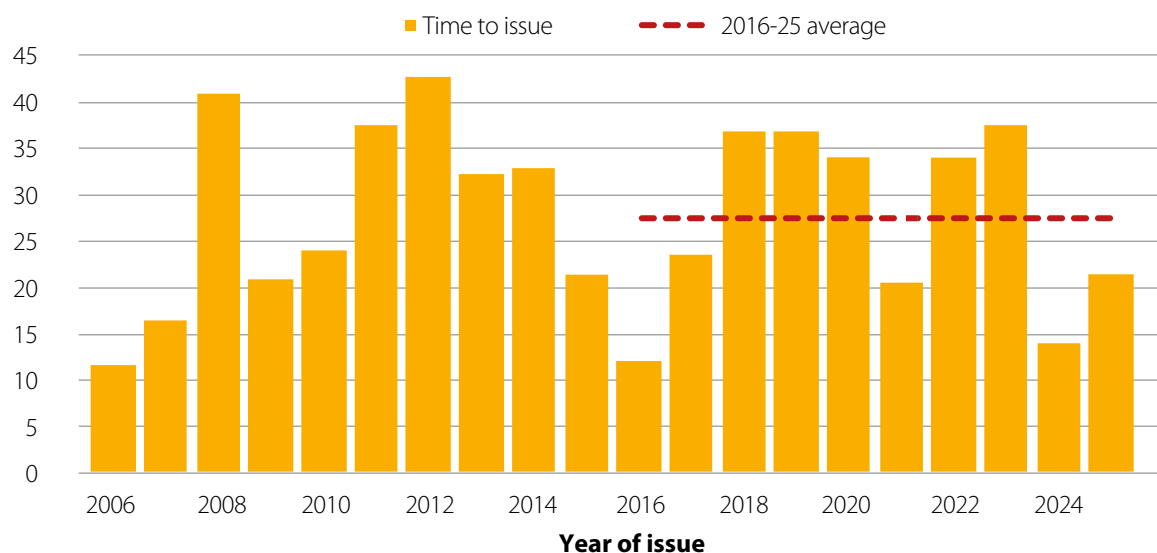




Figure 10. Average time to obtain a crushed rock extraction planning permission (GB) in months

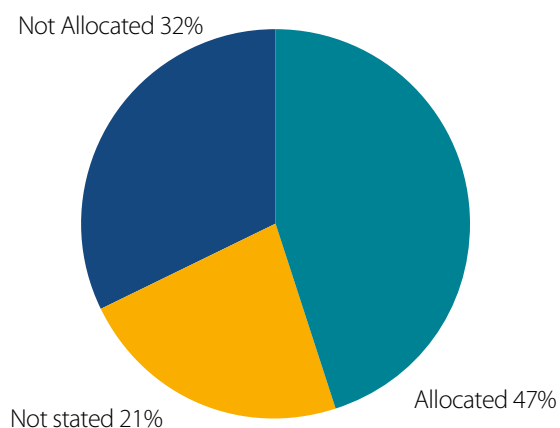


4.5 Allocated versus unallocated sites

Figure 11 shows that for the period 2016 to 2025, 32% of the permissions granted for extraction of minerals were not identified/allocated in an adopted Mineral Plan. This represents a significant proportion of permissions on non-allocated sites and highlights the need for Mineral Local Plans to be updated and include allocations, and also to include policies that enable non-allocated 'windfall' sites to come forward and be considered to ensure there is flexibility provided within the planning system to accommodate this.

Figure 11. Local plan status for land-won aggregates* permissions issued, 2016-25 (GB)

*Crushed rock and sand & gravel



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
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