

# **London Aggregates Working Party**

Annual Monitoring Report 2023 (2022 data)

**Correct as of this date: 4 October 2024**

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# Acronyms

Acronym	Definition
<b>AWP</b>	Aggregate Working Party
<b>BAA</b>	British Aggregates Association
<b>BGS</b>	British Geological Survey
<b>BMAPA</b>	British Marine Aggregate Producers Association
<b>CDEW</b>	Construction, Demolition and Excavation Waste
<b>DLUHC</b>	Department of Levelling up, Housing and Communities
<b>LAA</b>	Local Aggregates Assessment
<b>MHCLG</b>	Ministry of Housing, Communities and Local Government
<b>LAWP</b>	London Aggregate Working Party
<b>MPA</b>	Mineral Planning Authority
<b>mpa</b>	Mineral Products Association
<b>NPPF</b>	National Planning Policy Framework
<b>SOCG</b>	Statement of Common Ground
<b>WDI</b>	Waste Data Interrogator

# Glossary

## **Active/Inactive sites**

Sites are described as active where material was produced at any time during 2022 and as inactive when the site was not in production during that period. Inactive sites include those that have been worked in the past and those that have yet to begin. The term 'inactive' replaces the term 'dormant' used in surveys prior to AM97 as the term 'dormant' acquired a more specific meaning under the terms of the Planning & Compensation Act 1991 and the Environment Act 1995.

## **Aggregates**

Aggregates are defined as being hard, granular materials which are suitable for use either on their own or with the addition of cement, lime or a bituminous binder in construction. The most important applications for aggregates include concrete, mortar, roadstone, asphalt, railway ballast, drainage courses and bulk fill.

## **Development Plan**

The complete set of policies and proposals for the development and use of land and buildings in an area. This includes adopted Local Plans and neighbourhood plans and is defined in section 38 of the Planning and Compulsory Purchase Act 2004.

## **Duty to Cooperate**

Collaborative working with adjoining authorities, and other public bodies, regarding strategic issues which may have significant cross boundary impacts, during the preparation of Local Plans.

## **Landbanks**

The stock of mineral reserves with valid planning permissions for their extraction but where their extraction has yet to take place. The length of the aggregate landbank is the sum in tonnes of all permitted reserves for which valid planning permissions are extant, divided by the annual rate of future demand based on the latest annual Local Aggregate Assessment. The landbank is usually calculated at a mineral planning authority level.

## **Local Aggregate Assessment (LAA)**

An annual assessment of the demand for and supply of aggregates in a mineral planning authority's area.

## **LAA Annual Provision Rate (APR)**

The annual rates of provision for aggregates as detailed in the Local Aggregate Assessment which planning authorities should use as an indicator of how much should be planned for in their area.

## **Managed Aggregate Supply System (MASS)**

This system works through national, sub-national and local partners working together to ensure a steady and adequate supply of aggregate mineral across the country. It comprises the National & sub-national Guidelines for aggregates provision, Local

Aggregates Assessment, development plans, and work of the Aggregate Working Parties and the National Coordination Group.

### **Marine Aggregates**

Sand and gravel dredged from the sea bed offshore.

### **Mineral Plans / Mineral Local Plan**

A specialist type of Local Plan for those planning authorities with responsibilities for minerals planning, which set of a framework for decisions involving minerals development.

### **National and sub national guidelines**

An indication of the total amount of aggregate provision that the mineral planning authorities, collectively within each Aggregate Working Party, should aim to provide.

### **Permitted reserves**

In land use planning terms, reserves are those minerals that have planning permission for extraction. It includes reserves at active and inactive quarries but does not include reserves at dormant sites or sites that have not been granted planning permission. Permitted reserves are included in the landbank calculations.

### **Primary Aggregates**

Naturally occurring mineral deposits, extracted specifically for use as aggregates and are used for the first time. Most primary aggregates are produced from hard, strong rock formations by crushing to produce crushed rock aggregate or from naturally occurring particulate deposits such as sand and gravel.

### **Recycled Aggregates**

Produced from various sources including the demolition or construction of buildings and structures or from asphalt planings as a result of work to resurface roads and from railway track ballast. Recycling involves the processing of the waste material so that it can be made into new materials for aggregate use.

### **Secondary Aggregates**

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, spent railway ballast etc.

### **Statement of Common Ground**

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.

# Introduction

## Executive Summary

The London Aggregate Working Party (LAWP) is one of nine similar working parties throughout England and Wales established in the 1970's. All London Boroughs are Mineral Planning Authorities (MPAs) as detailed in figure 1.

This Annual Monitoring (AM) report provides sales and reserve data for the calendar year 1<sup>st</sup> January – 31<sup>st</sup> December 2022 for London. The last National Aggregate Minerals Survey was undertaken in 2019. A copy of the national report can be viewed at: [Aggregate Minerals Survey 2019](#). The next National survey is being undertaken in 2024 collecting 2023 data and information from that survey will be reported in the subsequent LAWP monitoring report.

The Annual Monitoring Report provides information on aggregates in the Greater London region so that the LAWP can contribute to the monitoring of the Managed Aggregate Supply System (MASS) and assess whether the Greater London region is making a full contribution towards meeting both national and local aggregate needs.

This report includes:

- Maps showing the geographical area covered by the LAWP and the location of quarries, wharves and rail depots.
- Sales and reserves of primary aggregates in 2022, collected from the LAWP Annual Monitoring Survey 2023, and estimated where data was not available.
- The landbank in the LAWP area at 31 December 2022 and wharf and rail depot capacities
- Secondary and Recycled Aggregates production/sales in the LAWP
- Information on minerals plans and policies in the LAWP area.
- Information on aggregates sites and planning applications
- Information on the latest Local Aggregate Assessments prepared by the mineral planning authorities.

## **London AWP – AMR 2023**

The key findings of this Annual Monitoring Report including 2022 data is as follows:

### **Land-won Sand and Gravel**

- Land won sales of 0.42mt from London (0.34mt in 2021)
- Land won sales imported into London using rail and water transport 0.77mt (1.04mt in 2021).
- Total Land-won Sand and Gravel Sales of 1.19mt (1.38mt total in 2021).
- Total Sand and Gravel Reserves in London of 2.29mt (3.27mt in 2021)
- Landbank of permitted reserves in London of 3.27 years (4.67 years in 2021).
- The landbank is calculated based on 0.7mt per annum over 7 years (reflecting London Plan Policy SI 10B that requires the maintenance of a 5 million tonnes of land-won aggregates).

### **Crushed Rock**

- Total Crushed Rock (imports) Sales of 3.03mt (2.59mt in 2021)

### **Marine Dredged Sand and Gravel**

- Marine dredged sand and gravel sales reported 2.49mt (not available for 2021).
- Marine dredged sand and gravel landed at London wharves 4.06mt<sup>1</sup> (4.61mt in 2021).

### **Secondary and Recycled Aggregate**

- Waste Data Interrogator (WDI) for whole of London 4.46mt of recycled aggregate produced.

### **Overall Primary Aggregates figures**

- Total primary aggregates sales 6.71mt<sup>2</sup> (8.58mt in 2021)
- Total primary aggregates reserves 2.29mt ( 3.27mt in 2021)

A summary of key figures for 2022 is provided in Table 1 below.

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<sup>1</sup> [Crown Estate Summary of Statistics 2022 Report](#)

<sup>2</sup> Land-won sales from London quarries were only 4% of total and 96% of sales are of aggregates imported to London via wharves and rail depots.



**Table 1: Dashboard Key Data Summary (million tonnes)**

Aggregate	Sales in 2022	Change in sales from previous year	10 year sales average	Sales Trend	3 year sales average	Sales Trend	LAA/London Plan (annual provision)	Permitted reserves in London at 31 December 2021	Change in permitted reserves from previous year	Landbank of permitted reserves in London (years)
Sand and Gravel (London Only)	0.42	↑	0.34	↑	0.37	↑	0.7	2.29	↓	3.27
Sand and Gravel Total	1.19	↓	0.9	↑	1.29	↓	N/A	2.29	↓	3.27
Crushed Rock	3.03	↑	3.27	↓	2.59	↑	N/A	N/A	N/A	N/A
Marine sand and gravel (sales)	2.49 <sup>3</sup>	↓	5.07	↓	3.28	↓	N/A	N/A	↓	25 <sup>4</sup>
Total Primary Aggregates	6.71	↓	9.25	↓	7.16	↓	0.70 <sup>5</sup>	2.29	↓	3.27
Recycled and Secondary Aggregates	4.46 <sup>6</sup>	↑	N/A	-	4.18	↑	N/A	N/A	N/A	N/A

<sup>3</sup> Includes Marine Sand and Gravel transported into London by rail.

<sup>4</sup> Crown Estate estimates – p10 [Marine Aggregates Annual Review 2023](#)

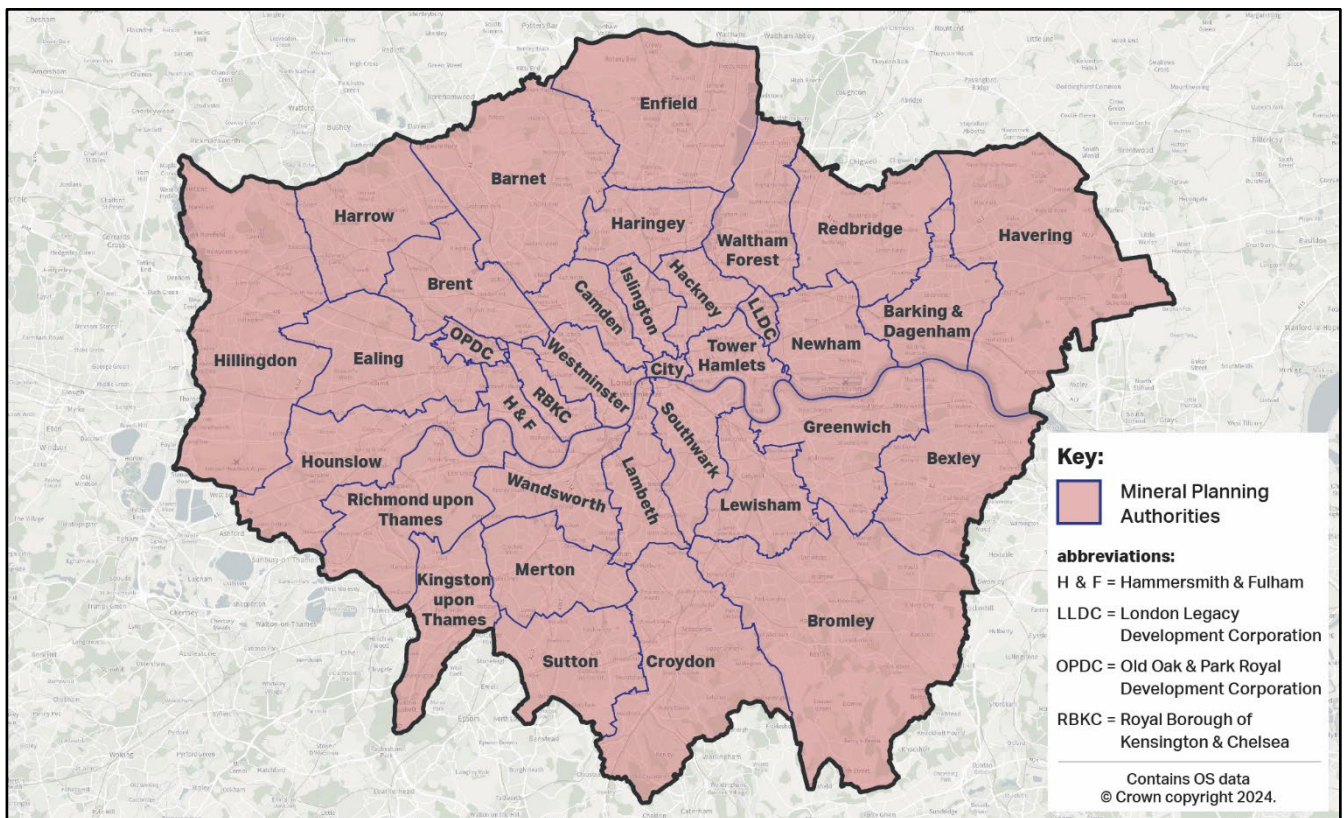
<sup>5</sup> Based on GLA LAA 2018 and Policy SI 10 within the London Plan 2021

<sup>6</sup> Calculated for whole of London using the Waste Data Interrogator (details in Table 5)

# Mineral Planning Authorities in London (LAWP Area)

All of London's Boroughs, together with the Mayoral Development Corporations (LLDC and ODPC), are Mineral Planning Authorities. The current LAWP membership comprises representatives of six of the London Boroughs containing minerals (Redbridge, Havering, Bexley, Greenwich, Hounslow and Hillingdon) and other Boroughs who have taken up the invitation to join. Other members include the those from the aggregates industry with operations in the Capital.

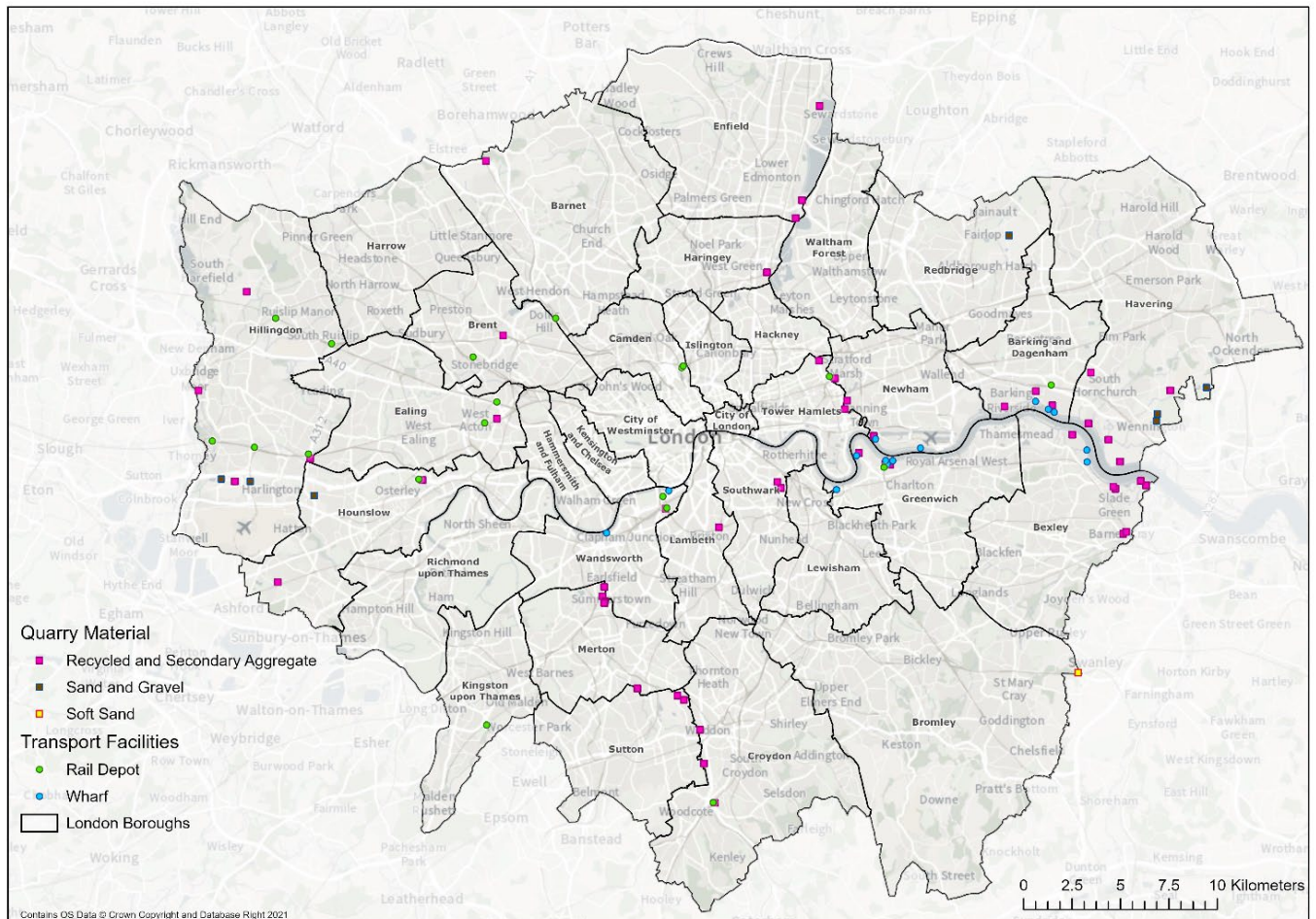
**Figure 1** London LAWP Area Mineral Planning Authorities



# Primary Aggregates

## Location of quarries, wharves and rail depots

**Figure 2** Location of quarries, recycled aggregates facilities, wharves and rail depots in 2022



## Sales and Imports

Information on sales of primary aggregates from quarries in London is provided in tables 2a-d. The table also contains information on the sales and imports of land won sand and gravel, marine won sand and gravel and crushed rock from wharves and rail depots. Unlike other Aggregate Working Party Areas, the LAWP area is highly reliant upon aggregate imports due to the low amount of potentially available resources and permitted reserves within the Greater London region.

The data used to inform this table has been obtained from the returns received from operators during the LAWP survey 2023 (relating to 2022 data). It should be noted that operator returns for 2021 and 2022 surveys were low, in part due to the Covid-19 pandemic, which has had an impact on overall figures and trends.

## London AWP – AMR 2023

The total Land-won Sand and Gravel Sales in 2022 from within London was 0.42mt. The sand and gravel quarried in London has a 3 year average sales figure of 0.37mt and 10 year average sale of 0.34mt.

Paragraph 219(f) of the National Planning Policy Framework (NPPF) sets out that there should be a 7 year landbank for sand and gravel. The landbank allowance calculated in London Plan Policy SI 10B is 0.7mt per annum, which is an apportionment of the 5mt requirement in the London Plan 2021. London Plan Policy SI 10 B requires provision made to maintain a sandbank of at least 5 million tonnes. This would equate to 0.7mtpa provision over 7 years.

Total sand and gravel sales from land-won sources was 1.19mt, including imports by rail depots and wharves of 0.77mt. This is a decrease from 2021 total land won sales figures which was 1.38 mt. The average level of total sales over the last three years is 1.29mt. The ten year average of total sales for land won sand and gravel is 0.9mt.

London has no crushed rock quarries and is therefore entirely reliant on supply of crushed rock aggregate via wharves and rail depots. There are two sources for the aggregate for wharves and rail in London, inter-regional flow (aggregate from within England and Wales being brought into London) and imports from outside England and Wales. The majority of inter-regional flows are from quarries in the South West and East Midlands Regions, although crushed rock is also supplied to London by the West Midlands, South East and South Wales Regions. Imports of crushed rock are supplied by Scotland and Norway.

The total crushed rock sales in 2022 were 3.03mt. This is an increase from 2021 sales figures which were 2.59 mt. Crushed rock sales in 2022 are now above the 3 year average sales figures (2.59mt), however the sales continued to remain below the 10 year average (3.27mt).

With regard to marine sand and gravel, reported sales were 2.49mt in 2022. Marine sand and gravel is often landed at a London wharf and then transported by rail across London. As mentioned in footnote 10 of this report, a figure of 0 for sales of marine sand and gravel from rail depots has been reported, as the sales of marine sand and gravel landed in London are reported within the wharves marine sand and gravel figure. Therefore a '0' has been inputted to avoid double counting within the aggregate sales. If marine sand and gravel is landed outside London and transported into London by rail it is combined with the wharf figure for confidentiality reasons.

The 2022 figures represent marine sand sales as reported from operators. Previous years sales figures have relied on the landed figure obtained from the Crown Estates Annual Report due to a lack of return received from operators. However the correct method for this report is to provide sales figures where these are available. To provide a level of consistency and comparison however landed figures for marine sand and gravel as reported by the Crown Estate are also provided. For 2022 the Crown Estate reported that 4.06mt of marine sand and gravel were landed at wharves within London this is a decrease from the 4.61mt that was landed at London wharves in 2021.

Overall total reported sales of aggregate in London fell from 8.58mt in 2021 to 6.71mt in 2022. This is partly due to the use of the marine sand and gravel sales figure being used (2.49mt) instead of the landed figure (4.06mt).



## **London AWP – AMR 2023**

Overall sales are below the ten year average of 9.25mt and the three year average of 7.16mt.

Import data is only collected through the national surveys. The latest available data on imports was collected via the national Aggregates Minerals Survey 2019, which was undertaken jointly between the Ministry of Housing Communities and Local Government (now known as the Department of Levelling Up Homes and Communities) and the British Geological Survey (BGS). The next national survey will take place in 2024 collecting data for 2023. Therefore no imported aggregate data was collected through the LAWP 2023 (2022 data) survey, and there is no data on imports for the region for the year 2022.

Table 5c of the Aggregate Mineral Survey 2019 demonstrates that 1.2mt of igneous rock and 0.10mt of sandstone was imported into the region from outside England and Wales in 2019. These imports of crushed rock are most likely to principally originate from Norway or Scotland although crushed rock is also imported into England from France and Northern Ireland.

**Table 2a: Sales of Primary Aggregates**

Land won Sand and Gravel	2013	2014	2015	2016	2017	2018	2019	2020	2021	2022	10 year average	3 year average
London sourced sales from quarries	0.37	0.37	0.30	0.35	0.26	0.34	0.34	0.34	0.34*	0.42	0.34	0.37
Sales of land won sand and gravel from wharves	0.11	0.1	0	0	0	0	0	0.02	-	-	-	-
Sales of land won sand and gravel from rail depots	0.12	0.12	0.09	0.05	0.1	0.81	1.31 <sup>7</sup>	0.95 <sup>8</sup>	-	0.77	-	-
<b>Total Sand and Gravel sales</b>	<b>0.6</b>	<b>0.59</b>	<b>0.39</b>	<b>0.4</b>	<b>0.36</b>	<b>1.15</b>	<b>1.65</b>	<b>1.31</b>	<b>1.38</b>	<b>1.19</b>	<b>0.9</b>	<b>1.29</b>

**Table 3b: Sales of Primary Aggregates**

Crushed Rock	2013	2014	2015	2016	2017	2018	2019	2020	2021	2022	10 year average	3 year average
London sourced sales of crushed rock	0	0	0	0	0	0	0	0	-	-	n/a	n/a
Sales of crushed rock from wharves	0.58	0.66	0.38	0.3	0.12	0.47	0.48	0.54	-	-	-	-
Sales of crushed rock from rail depots	3.1	2.46	2.74	3.95	3.66	3.02	3.03	1.6	-	-	-	-
<b>Crushed rock totals</b>	<b>3.68</b>	<b>3.12</b>	<b>3.12</b>	<b>4.25</b>	<b>3.78</b>	<b>3.49</b>	<b>3.51</b>	<b>2.14</b>	<b>2.59</b>	<b>3.03</b>	<b>3.27</b>	<b>2.59</b>

<sup>7</sup> Combined figure of land won and marine sand and gravel 2019 from rail depots to maintain confidentiality.

<sup>8</sup> Combined figure of land won and marine sand and gravel 2020 from rail depots to maintain confidentiality.

**Table 4c: Sales of Primary Aggregates**

Marine sand and gravel	2013	2014	2015	2016	2017	2018	2019	2020	2021	2022	10 year average	3 year average
Sales of marine sand and gravel from wharves	4.35	4.59	4.95	5.39	5.02	4.67	4.44	2.75	4.61	2.49	-	-
Sales of marine sand and gravel from rail depots	1.19	1.11	1.49	1.56	1.56	0.57	0 <sup>9</sup>	0 <sup>10</sup>	-	0 <sup>11</sup>	-	-
<b>Total Marine Sand and Gravel Sales</b>	<b>5.54</b>	<b>5.7</b>	<b>6.44</b>	<b>6.95</b>	<b>6.58</b>	<b>5.24</b>	<b>4.44</b>	<b>2.75</b>	<b>4.61</b>	<b>2.49</b>	<b>5.07</b>	<b>3.28</b>
<b>Total Aggregate Sales</b>	<b>9.82</b>	<b>9.41</b>	<b>9.95</b>	<b>11.6</b>	<b>10.72</b>	<b>9.88</b>	<b>9.60</b>	<b>6.20</b>	<b>8.58</b>	<b>6.71</b>	<b>9.25</b>	<b>7.16</b>

**Table 5d: Total Sales of Primary Aggregates**

Year	2013	2014	2015	2016	2017	2018	2019	2020	2021	2022	10 year average	3 year average
<b>Total Aggregate Sales</b>	<b>9.82</b>	<b>9.41</b>	<b>9.95</b>	<b>11.6</b>	<b>10.72</b>	<b>9.88</b>	<b>9.60</b>	<b>6.20</b>	<b>8.58</b>	<b>6.71</b>	<b>9.25</b>	<b>7.16</b>

<sup>9</sup> Combined figure of land won and marine sand and gravel figure 2019 from rail depots – recorded as 0 to avoid double counting.

<sup>10</sup> Combined figure of land won and marine sand and gravel figure 2020 from rail depots – recorded as 0 to avoid double counting.

\*estimated

<sup>11</sup> Recorded as 0 to avoid double counting.

## Permitted Reserves

The permitted reserves of sand and gravel and crushed rock in the LAWP area at 31 December 2022 are set out in Table 3 below.

The permitted reserves for sand and gravel in London at 31 December 2022 were 2.29mt. This represents a decrease in permitted reserves from 3.27mt in 2021.

This decrease is due to there being no additional permissions granted for the extraction of sand and gravel in London.

As previously stated in the report, there are no crushed rock permitted reserves in London.

Regarding wharves' capacity the GLA undertook a Review<sup>12</sup> in 2019. The Safeguarded Wharves Review 2019 examined wharf capacity along the Thames. It set out the capacity and forecast demand for construction materials over the period 2021 – 2041.

It concluded that “in the near term there could be concerns with both construction materials and petroleum that are forecast to have higher demand than capacity”, predicting a small surplus in 2021, a small deficit in 2031 and a modest surplus in 2041.

The assumptions it used to forecast demand are unclear so this prediction should be treated with caution. Nevertheless, as wharves are so important to London's aggregate supply, sales and capacities, they need to be closely monitored by the LAWP.

**Table 3 Reserves and capacity of infrastructure (million tonnes)**

Aggregate	2011	2012	2013	2014	2015	2016	2017	2018	2019	2020	2021	2022
<b>Total London Sand &amp; Gravel Permitted Reserves</b>	1.12	1.18	1.37	0.7	1.40	1.32	2.21	3.38	3.19	4.65	3.27	2.29
<b>Total London Crushed Rock Permitted Reserves</b>	0	0	0	0	0	0	0	0	0	0	0	0
<b>Total permitted reserves</b>	<b>1.12</b>	<b>1.18</b>	<b>1.37</b>	<b>0.7</b>	<b>1.40</b>	<b>1.32</b>	<b>2.21</b>	<b>3.38</b>	<b>3.19</b>	<b>4.65</b>	<b>3.27</b>	<b>2.29</b>

<sup>12</sup> [Safeguarded Wharves Review 2019](#)



## **Landbank in LAWP Area**

The London LAAs are not up-to-date. Havering, Redbridge, and Hillingdon have prepared LAAs in the past. In 2018, the GLA prepared a London wide LAA based on AM 2017 information in support of the London Plan. The LAWP is currently considering how best to prepare annual updates to the LAA.

The London Plan under policy SI10 sets out a strategy to ensure an adequate supply of aggregates to support construction in London, by making provision for the maintenance of a landbank of at least 5 million tonnes (i.e. seven years supply) of land-won aggregates until 2041. Local plans should make provision for maintenance of that landbank through an apportionment of at least:

- 1.75 million tonnes to Havering LB.
- 0.7 million tonnes to Redbridge LB.
- 1.75 million tonnes to Hillingdon LB.
- 0.7 million tonnes to Hounslow LB.

This in effect requires provision to be made London-wide for at least 0.7mt per annum - approximately 0.25mt per annum for Havering and Hillingdon and 0.125mt per annum for Hounslow and Redbridge.

The overall sand and gravel reserves in London at 31 December 2022 is estimated to be 2.29mt with a landbank of 3.27 years if the full 0.7mt apportionment is extracted. The reserves are therefore below the requirement of the London Plan (5mt). Consequently London is not making a sufficient contribution towards the National supply of land won aggregates. The landbank is estimated due to a limited number of returns received from London quarries over successive years.

The figure of 3.27 years is derived using the London annual apportionment figure of 0.7mt to calculate the years of landbank. However, if the 10 year sales average of 0.34mt is used to calculate the landbank of sand and gravel then the figure is 6.74 years. The 10 year sales average does contain years where the sales figure for sand and gravel from London quarries was estimated, so this figure needs to be treated with caution.

As there are no crushed rock permitted reserves in London, there is no landbank.

**Table 4**      *Landbank in LAWP Area*

<b>Aggregate</b>	<b>Annual rate of future demand based on the latest annual Local Aggregate Assessment (million tonnes)</b>	<b>LAA Rate is 10 years sales average</b>	<b>Annual Rate of future demand based on 10 years sales average (million tonnes)</b>	<b>Reserves (as of 31<sup>st</sup> December 2022) (million tonnes) or capacity</b>	<b>Landbank in year (as at 31<sup>st</sup> December 2022)</b>
<b>Land-won Sand and Gravel, London quarries</b>	0.7	No	0.33	2.29	3.27
<b>Total Sand &amp; Gravel</b>	0.7	N/A	0.83	-	-

# Secondary and Recycled Aggregates

It is estimated there approximately 50 sites that handle construction, demolition, and excavation (CDE) waste. London's recycled aggregates production is estimated from data collected by the Environment Agency's Waste Data Interrogator (WDI) and illustrated in Table 5 below. It is important to understand the data limitations associated with secondary and recycled aggregates. Most notably the data within the WDI is collected from the returns from permitted facilities and records only waste received, and waste exported from site.

Secondary aggregates, where certain quality protocol specifications are met, are considered to be non-waste on individual construction sites. These secondary aggregates are therefore not included within waste tonnage returns data and go unreported. The tonnage of recycled aggregates reported in the WDI is therefore likely to only represent a proportion of the recycled aggregates in circulation. These figures are only estimates and should be treated with caution.

New guidance has been released on how to calculate CD&E Waste arisings. This guidance was put together by a number of Waste Technical Advisory Bodies (WTABS) with input from members of aggregate working parties across the country. The Produced and Managed figures shown in Table 5 are for the whole of London and are calculated using the new guidance. Due to the change in methodology these figures are not comparable to figures in previous reports. The produced figures relate to waste in London only, while the managed figure includes waste that is handled within London and includes waste that has been transported into London to be processed.

Operators also provided data for sales of 596,055 tonnes of secondary and recycled aggregate.

## National Data

**Table 5** *CD&E Waste Arisings (Environment Agency, 2020<sup>13</sup>, 2021<sup>14</sup>, 2022<sup>15</sup>)*

Mineral Planning Area	Amount Produced (tonnes)	Amount Managed (tonnes)
London 2020	3,819,496	3,861,284
London 2021	4,270,233	4,298,511
London 2022	4,460,679	4,381,687
<b>3 year average</b>	<b>4,183,469</b>	<b>4,381,687</b>

<sup>13</sup> [2020 Waste Data Interrogator - data.gov.uk](https://data.gov.uk/dataset/2020-waste-data-interrogator)

<sup>14</sup> [2021 Waste Data Interrogator - data.gov.uk](https://data.gov.uk/dataset/2021-waste-data-interrogator)

<sup>15</sup> [2022 Waste Data Interrogator - data.gov.uk](https://data.gov.uk/dataset/2022-waste-data-interrogator)

# Development Plans and Mineral Policies in London

Table 6 below gives an overview of the local plan status and progress of any emerging local plans in London, including the London Plan. The four boroughs identified in the London Plan required to make a contribution towards aggregate all have adopted mineral planning policies. These are Havering, Hounslow, Redbridge and Hillingdon.

**Table 6: Local Plans and Minerals Plans Information 2022**

Mineral Planning Authority / Authorities	Plan Name/Mineral DPD	Preparation stage / Current Status in 2022	Status in 2021
Greater London Authority	The London Plan	Adopted March 2021	Adopted 2021
Barking and Dagenham	Core Strategy	Adopted July 2010	Adopted 2010
Barking and Dagenham	New Local Plan	In examination	Regulation 19
Barnet	Core Strategy	Adopted 2012	Adopted 2012
Barnet	Development Management Policies	Adopted 2012	Adopted 2012
Barnet	New Local Plan	In examination	Regulation 19
Bexley	Bexley Local Plan review	In examination	Regulation 19
Bexley	Core Strategy	February 2012	Adopted 2012
Brent	West London Waste Plan	Adopted 2015	Adopted 2015
Brent	New Brent Local Plan 2019 -2041	Adopted 2022	Examination
Bromley	Local Plan	Adopted 2019	Adopted 2019
Camden	Local Plan	Adopted 2017	Adopted 2017
Camden	Local Plan Review	Initial consultation	N/A
Camden	North London Waste Plan	Adopted 2022	Adopted 2022
City of London	Local Plan	Adopted 2015	Adopted 2015
Croydon	Local Plan	Adopted 2018	Adopted 2018
Croydon	Local Plan Review	Regulation 19	Regulation 18
Croydon	South London Waste Plan	Adopted 2022	In examination
Ealing	Core Strategy	Adopted 2012	Adopted 2012
Ealing	Development Management Policies	Adopted 2013	Adopted 2013
Ealing	New Local Plan	Regulation 18	In preparation
Ealing	West London Waste Plan	Adopted 2015	Adopted 2015

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<b>Mineral Planning Authority / Authorities</b>	<b>Plan Name/Mineral DPD</b>	<b>Preparation stage / Current Status in 2022</b>	<b>Status in 2021</b>
<b>Enfield</b>	Core Strategy 2010-2025	Adopted 2010	Adopted 2010
<b>Enfield</b>	New Local Plan	Regulation 18	Regulation 18
<b>Enfield</b>	North London Waste Plan	Adopted 2022	Adopted 2022
<b>Greenwich</b>	Royal Greenwich Local Plan: Core Strategy with Detailed Policies	Adopted 2014	Adopted 2014
<b>Hackney</b>	Local Plan (LP33)	Adopted 2020	Adopted 2020
<b>Hammersmith and Fulham</b>	Local Plan	Adopted 2018	Adopted 2018
<b>Havering</b>	Local Plan	Adopted 2021	Adopted 2021
<b>Haringey</b>	Strategic Policies	Adopted 2013 (with alterations 2017)	Adopted 2013 (with alterations 2017)
<b>Haringey</b>	Development Management DPD	Adopted 2017	Adopted 2017
<b>Haringey</b>	New Local Plan	Regulation 18	Regulation 18
<b>Haringey</b>	North London Waste Plan	Adopted 2022	In examination
<b>Harrow</b>	Local Plan	Adopted 2012	Adopted 2012
<b>Hillingdon</b>	Local Plan: Part 1 Strategic Policies	Adopted Nov 2012	Adopted 2012
<b>Hillingdon</b>	Part 2 (LPP2): Development management policies, site allocations & policies map	Adopted Jan 2020	Adopted 2020
<b>Hounslow</b>	Hounslow Local Plan 2015-30 Volume 1	Adopted 2015	Adopted 2015
<b>Hounslow</b>	Hounslow Local Plan 2015-30 Volume 2	Adopted 2015	Adopted 2015
<b>Hounslow</b>	Single Local Plan	In preparation	N/A
<b>Hounslow</b>	West London Waste Plan	Adopted 2015	Adopted 2015
<b>Islington</b>	Core Strategy	Adopted 2011	Adopted 2011
<b>Islington</b>	Development Management Policies, Site Allocations and Finsbury Local Plan	Adopted 2013	Adopted 2013
<b>Islington</b>	New Local Plan	In examination	In examination
<b>Kingston Upon Thames</b>	Core Strategy	Adopted 2012	Adopted 2012

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<b>Mineral Planning Authority / Authorities</b>	<b>Plan Name/Mineral DPD</b>	<b>Preparation stage / Current Status in 2022</b>	<b>Status in 2021</b>
<b>Kingston Upon Thames</b>	South London Waste Plan	Adopted 2022	In examination
<b>Kingston Upon Thames</b>	New Local Plan	Regulation 18	Regulation 18
<b>Lambeth</b>	Local Plan	Adopted 2021	Adopted 2021
<b>Lewisham</b>	Core Strategy	Adopted 2011	Adopted 2011
<b>Lewisham</b>	Site Allocations Local Plan	Adopted 2013	Adopted 2013
<b>Lewisham</b>	Development Management Local Plan	Adopted 2014	Adopted 2014
<b>Lewisham</b>	New Local Plan	Regulation 18	Regulation 18
<b>London Legacy Development Corporation</b>	Local Plan	Adopted 2020	Adopted 2020
<b>Merton</b>	Core Planning Strategy	Adopted 2011	Adopted 2011
<b>Merton</b>	Sites and Policies Plan and Policies Plan	Adopted 2014	Adopted 2014
<b>Merton</b>	Local Plan	In examination	Regulation 19
<b>Newham</b>	Local Plan	Adopted 2018	Adopted 2018
<b>Newham</b>	North London Waste Plan	Adopted 2022	In examination
<b>Old Oak and Park Royal Development Corporation</b>	Local Plan	Adopted 2022	In examination
<b>Richmond upon Thames</b>	Local Plan	Adopted 2020	Adopted 2018
<b>Richmond upon Thames</b>	West London Waste Plan	Adopted 2015	Adopted 2015
<b>Richmond upon Thames</b>	New Local Plan	Regulation 18	Informal Consultation 2020
<b>Redbridge</b>	London Plan	Adopted 2018	Adopted 2018
<b>Redbridge</b>	Minerals Local Plan	Adopted 2012	Adopted 2012
<b>Southwark</b>	Local Plan	Adopted 2022	In examination
<b>Sutton</b>	Local Plan	Adopted 2018	Adopted 2018
<b>Sutton</b>	South London Waste Plan	Adopted 2022	In examination
<b>Tower Hamlets</b>	Local Plan	Adopted 2020	Adopted 2020
<b>Wandsworth</b>	Core Strategy	Adopted 2016	Adopted 2016
<b>Wandsworth</b>	Local Plan	Adopted 2018	Adopted 2018
<b>Wandsworth</b>	New Local Plan	In examination	Regulation 18
<b>Wandsworth</b>	South London Waste Plan	Adopted 2022	In examination
<b>Waltham Forest</b>	Core Strategy	Adopted 2012	Adopted 2012

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<b>Mineral Planning Authority / Authorities</b>	<b>Plan Name/Mineral DPD</b>	<b>Preparation stage / Current Status in 2022</b>	<b>Status in 2021</b>
<b>Waltham Forest</b>	Development Management Policies	Adopted 2013	Adopted 2013
<b>Waltham Forest</b>	New Local Plan Part 1: Strategic Policies (LP1)	In examination	In examination
<b>Waltham Forest</b>	New Local Plan Part 2: Site Allocations (LP2)	In preparation	In preparation
<b>Waltham Forest</b>	North London Waste Plan	Adopted 2022	Adopted 2022
<b>Westminster</b>	City Plan 2019-2040	Adopted 2021	Adopted 2021

# Aggregates sites and planning applications in London LAWP Area

A list of quarries and wharfs producing primary aggregates in the Greater London are detailed in table 7 below. A map showing the location and geographical distribution of these sites are detailed in figure 2.

**Table 7** *Aggregates sites in LAWP area*

Mineral Planning Authority	Site name	Type	Operator	Grid Ref
<b>Barking and Dagenham</b>	Dagenham Dock	Wharf	Hanson Aggregates	549100 181600
<b>Barking and Dagenham</b>	Dagenham Dock	Wharf	Cemex	548100 182100
<b>Barking and Dagenham</b>	Dagenham	Rail Depot	Hanson Aggregates	581100 149100
<b>Barking and Dagenham</b>	Eurovia (No1 Western Extension)	Wharf	Eurovia Roadstone	548800 181800
<b>Barking and Dagenham</b>	Manns Waste Management Ltd	Recycled and Secondary Aggregate	Manns Waste Management Ltd	549011 182001
<b>Barking and Dagenham</b>	Barking Riverside Recycling Park	Recycled and Secondary Aggregate	Foundation Developments Ltd	547162 180205
<b>Barking and Dagenham</b>	S U C Exc U K Ltd	Recycled and Secondary Aggregate	S U C Exc U K Ltd	548160 182738
<b>Barnet</b>	Scratchwood Quarry	Recycled and Secondary Aggregate	Quality Recycling Solutions	519766 194617
<b>Bexley</b>	Pioneer Wharf, Erith	Wharf	Tarmac Ltd	550800 179700
<b>Bexley</b>	Erith Wharf	Wharf	FM Conway	550900 179100
<b>Bexley</b>	Roll On Off Services Ltd	Recycled and Secondary Aggregate	Roll On Off Services	553849 177877
<b>Bexley</b>	Metropolitan Waste Management Ltd	Recycled and Secondary Aggregate	Metropolitan Waste Management Ltd	552266 177704
<b>Bexley</b>	Anchor Bay Wharf	Recycled and Secondary Aggregate	Erith Remediation Technologies Ltd	552777 177820



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<b>Mineral Planning Authority</b>	<b>Site name</b>	<b>Type</b>	<b>Operator</b>	<b>Grid Ref</b>
<b>Bexley</b>	Anchor Bay, Commercial Haulage Waste Treatment Facility	Recycled and Secondary Aggregate	Mr G. Dugdale, Mr M. Dugdale, Mr S. Dugdale	552973 552973
<b>Bexley</b>	Landau Way Transfer Station	Recycled and Secondary Aggregate	J & H Haulage Ltd	553586 178099
<b>Bexley</b>	Burts Wharf Recycling Depot	Recycled and Secondary Aggregate	Highway United Ltd	550041 180494
<b>Bexley</b>	Crayfords Materials Recycling Facility	Recycled and Secondary Aggregate	Viridor Waste Management Ltd	552824 175480
<b>Brent</b>	Wembley	Rail Depot	Aggregate Industries left in September 2022 now operated by SRC Group	519100 184500
<b>Brent</b>	Park Royal	Rail Depot	Tarmac Ltd	519500 182600
<b>Brent</b>	Cricklewood Railway Yard	Rail Depot	DB Cargo (UK) Ltd	523344 186487
<b>Brent</b>	Seneca Environmental Solutions Ltd	Recycled and Secondary Aggregate	Seneca Environmental Solutions Ltd	520650 185611
<b>Bromley</b>	Bourne Wood	Soft Sand Quarry	Bournewood S&G Ltd	550346 168205
<b>Camden</b>	Kings Cross	Rail Depot	Tarmac Ltd	530000 183800
<b>Camden</b>	Kings Cross	Rail Depot	Hanson Aggregates	530000 183900
<b>Croydon</b>	Purley	Rail Depot/ Recycled and Secondary Aggregate	Day Aggregates	531500 161500
<b>Croydon</b>	Henry Woods Waste Management Ltd	Recycled and Secondary Aggregate	Henry Woods Waste Management Ltd	530819 165256
<b>Croydon</b>	Able Waste Services Ltd	Recycled and Secondary Aggregate	Able Waste Services Ltd	531018 163511
<b>Ealing</b>	Acton Rail Depot	Rail Depot/ Recycled and Secondary Aggregate	Aggregate Industries UK Limited	520289 181311
<b>Ealing</b>	Acton Rail Depot	Rail Depot	Quattro UK Ltd	520278 181231

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<b>Mineral Planning Authority</b>	<b>Site name</b>	<b>Type</b>	<b>Operator</b>	<b>Grid Ref</b>
<b>Greenwich</b>	Murphy's Wharf	Wharf	Tarmac Ltd	540400 179000
<b>Greenwich</b>	Riverside Wharf	Wharf	Tarmac Ltd	579300 141300
<b>Greenwich</b>	Victoria Deep	Wharf	Hanson Aggregates	538900 179400
<b>Greenwich</b>	Angerstein Wharf	Wharf	CEMEX	538900 179400
<b>Greenwich</b>	Brewery Wharf	Wharf	JJ Prior	537800 177600
<b>Greenwich</b>	Angerstein	Rail Depot/Recycled and Secondary Aggregate	Aggregate Industries	540400 179000
<b>Greenwich</b>	Day Aggregates	Recycled and Secondary Aggregate	Day Group Ltd	540639 178938
<b>Greenwich</b>	Morden Wharf	Recycled and Secondary Aggregate	H Sivyer (Transport Ltd	539092 179191
<b>Haringey</b>	O'Donovan-Markfield Road	Recycled and Secondary Aggregate	O'Donovan Waste Disposal Ltd	534279 188866
<b>Haringey</b>	Ferme Park Sidings	Rail Depot	Aggregate Industries UK Limited	531140 188507
<b>Havering</b>	Cockhide Farm	Sand and Gravel Quarry	Ingrebourne Valley	556969 182931
<b>Havering</b>	East Hall Farm	Sand and Gravel Quarry	Brett Aggregates Ltd	554446 181556
<b>Havering</b>	Wennington Quarry	Sand and Gravel Quarry	Ingrebourne Valley	554401 181209
<b>Havering</b>	Rainham Recycling Facility	Recycled and Secondary Aggregate	O'Keefe Utilities Ltd	555103 182776
<b>Havering</b>	Rainham M R F	Recycled and Secondary Aggregate	Veolia E S Cleanway (UK) Ltd	552500 179100
<b>Havering</b>	Veolia Inert Soils Coldharbour Lane	Recycled and Secondary Aggregate	Veolia E S Cleanaway (UK) Ltd	551910 180230
<b>Havering</b>	Mardyke Farm	Recycled and Secondary Aggregate	Ebbcliffe Ltd	551000 183700

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<b>Mineral Planning Authority</b>	<b>Site name</b>	<b>Type</b>	<b>Operator</b>	<b>Grid Ref</b>
<b>Havering</b>	Frog Island WM Facility	Recycled and Secondary Aggregate	Shanks Waste Management Ltd	550880 181070
<b>Hillingdon</b>	Harmondsworth Quarry	Sand and Gravel Quarry	Ingrebourne Valley	506100 178200
<b>Hillingdon</b>	Sipson (including Wall Garden Farm)	Sand and Gravel Quarry	Harleyford Aggregates Ltd	507500 178400
<b>Hillingdon</b>	West Drayton	Rail Depot	Hanson Aggregates	507800 179900
<b>Hillingdon</b>	West Ruislip	Rail Depot	N/A	508900 186500
<b>Hillingdon</b>	Hayes	Rail Depot	Tarmac Ltd	510600 179500
<b>Hillingdon</b>	Victoria Road, South Ruislip	Rail Depot	N/A	511791 185194
<b>Hillingdon</b>	Tavistock Road, West Drayton	Rail Depot	N/A	505638 180160
<b>Hillingdon</b>	Bulls Bridge Aggregate Recycling & Processing Plant	Recycled and Secondary Aggregate	FM Conway	510690 179263
<b>Hillingdon</b>	Crows Nest Farm	Recycled and Secondary Aggregate	Country Compost Ltd	507412 187876
<b>Hillingdon</b>	Holloway Lane Materials Recycling Facility	Recycled and Secondary Aggregate	Iver Recycling (UK) Ltd	506800 178080
<b>Hillingdon</b>	Wallingford Road Recycling Facility	Recycled and Secondary Aggregate	Johal Mya Waste Management Ltd	504921 182772
<b>Hounslow</b>	Rectory Farm	Sand and Gravel Quarry	n/a	n/a
<b>Hounslow</b>	Brentford	Rail Depot	Day Aggregates	516300 178200
<b>Hounslow</b>	Brentford Aggregate Materials Recycling Facility	Recycled and Secondary Aggregate	Day Group Ltd	516490 178152
<b>Hounslow</b>	Plot 39 Bedfont Trading Estate	Recycled and Secondary Aggregate	Fowles Crushed Concrete Ltd	509014 172887
<b>Kingston upon Thames</b>	Tolworth	Rail Depot	Day Aggregates	519800 165500
<b>Kingston Upon Thames</b>	Chessington Rail Depot	Rail Depot	Cappagh	517854 163121

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<b>Mineral Planning Authority</b>	<b>Site name</b>	<b>Type</b>	<b>Operator</b>	<b>Grid Ref</b>
<b>Lambeth</b>	Belinda Road Waste Transfer Facility	Recycled and Secondary Aggregate	Powerday Plc	531810 175697
<b>Merton</b>	Weir Road Waste Transfer Station	Recycled and Secondary Aggregate	Maguire Skips Ltd	525783 172147
<b>Merton</b>	77 Weir Road	Recycled and Secondary Aggregate	N J B Recycling Ltd	525883 172623
<b>Merton</b>	The Willows Materials Recycling Facility	Recycled and Secondary Aggregate	Cappagh Public Works Ltd	525900 171900
<b>Merton</b>	777 Recycling Centre	Recycled and Secondary Aggregate	777 Demolition and Haulage Co Ltd	529493 167083
<b>Merton</b>	George Killoughery Ltd	Recycled and Secondary Aggregate	George Killoughery Ltd	527586 167389
<b>Merton</b>	Waste Transfer and Recovery Facility	Recycled and Secondary Aggregate	Reston Waste Management Ltd	525881 171798
<b>Newham</b>	Royal Victoria Dock Wharf	Wharf	Tarmac Ltd	542200 179800
<b>Newham</b>	Peruvian Wharf	Wharf	Brett	539885 180274
<b>Newham</b>	Regional Waste Recycling (Commercial) Ltd	Recycled and Secondary Aggregate	Regional Waste Recycling (Commercial) Ltd	537786 183392
<b>Newham</b>	Thames Wharf	Recycled and Secondary Aggregate	Keltbray Environmental Ltd	539791 180427
<b>Newham</b>	Bywaters Recycling and Recovery Centre	Recycled and Secondary Aggregate	Bywaters (Leyton) Ltd	538416 182253
<b>Redbridge</b>	Fairlop Quarry	Sand and Gravel Quarry	Brett Aggregates Ltd	547000 190200
<b>Southwark</b>	Westminster Waste Ltd	Recycled and Secondary Aggregate	Westminster Waste Ltd	534810 178050
<b>Southwark</b>	Southwark Integrated Waste Management Facility	Recycled and Secondary Aggregate	Veolia ES Southward Ltd	534900 177400
<b>Sutton</b>	Raven Recycling	Recycled and Secondary Aggregate	Raven Waste Paper Company Ltd	529986 166802

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Mineral Planning Authority	Site name	Type	Operator	Grid Ref
<b>Tower Hamlets</b>	Bow	Rail Depot	Aggregate Industries	537500 183500
<b>Tower Hamlets</b>	Mc Grath Bros	Recycled and Secondary Aggregate	Mc Grath Bros (Waste control Ltd)	536971 184310
<b>Tower Hamlets</b>	D R Plant Solutions	Recycled and Secondary Aggregate	D R Plant Solutions Ltd	538297 181808
<b>Wandsworth</b>	Battersea Wharf (Cringle)	Wharf	CEMEX	529200 177600
<b>Wandsworth</b>	Pier Wharf	Wharf	Hanson Aggregates	526000 175400
<b>Wandsworth</b>	Battersea	Rail Depot	Day Aggregates	528900 177300
<b>Wandsworth</b>	Battersea	Rail Depot	Tarmac Ltd	529100 176700
<b>Wandsworth</b>	Day Aggregates Stewarts Lane Depot	Recycled and Secondary Aggregate	Day Group Ltd	529044 176672

Table 8 below lists the submitted planning applications for works relating to aggregates in London, these were either decided or pending a decision late 2021 through 2022 and early 2023. Applications that were submitted as far back as 2020 have also continued to be included where a decision is still pending or the decision was made in 2022.

**Table 8** *Planning Applications and Decisions relating to aggregates in LAWP Area*

Mineral Planning Authority	Site Name and Location (Grid Reference)	Operator / Applicant	Tonnage (for aggregate use)	Type of Application	Date Submitted	Decision
<b>Hillingdon</b>	LINK PARK HEATHROW Thorney Mill Road, Buckinghamshire	Unknown	Unknown	Demolition and re-development 73420/APP/2020/4268	09/04/2020	Refused 6/04/22
<b>Hillingdon</b>	Stockley Country Park And Recreational Ground Chestnut Avenue	Unknown	Unknown	Redesign of facility 73281/APP/2020/1171	23/12/2020	No further action

# Local Aggregate Assessments

Mineral Planning Authorities are required to prepare an annual Local Aggregate Assessment based on a rolling average of 10 years' sales data and other relevant local information, and an assessment of all supply options.

Havering and Hillingdon have prepared LAAs in the past. In 2018, the GLA prepared a London wide LAA which was largely based on the 2017 LAWP AMR data. A brief overview of LAA's carried out in London are outlined below.

**Table 9** *Local Aggregate Assessments in LAWP Region*

<b>Mineral Planning Authority</b>	<b>LAA Date</b>	<b>Sand and Gravel LAA Figure</b>	<b>Crushed Rock LAA Figure</b>	<b>Calculation Method</b>
<b>Havering</b>	2014	450,000	n/a	10 year sales average
<b>Redbridge</b>	n/a	n/a	n/a	n/a
<b>Hillingdon</b>	2017	213,200	n/a	10 year sales average (2006 – 2016)
<b>Hounslow</b>	n/a	n/a	n/a	n/a
<b>Greater London Authority</b>	2018	700,000	n/a	10 year sales average.

## Local and National Aggregate Need

As previously explained in the 'Landbank in LAWP' section of this report, the figure for London is 0.7mt per annum for sand and gravel, based on the provision set out in the London Plan 2021.

# Trends and Analysis

## Primary aggregate sales

Over time the London sourced aggregate land won sales figures have not fluctuated significantly however 0.42mt is the highest recorded level since 2014 when 0.37mt was recorded. A significant portion of land won sand and gravel is also provided to London by rail depots and wharves from sources outside London. However, the largest proportion of sales for sand and gravel for London continues to be provided from marine sources with 2.49mt in 2022. The total of marine won sand and gravel sales have however decreased from 4.61mt in 2021, although as previously explained in this report, the marine aggregate overall figures should be treated with a degree of caution.

In terms of imported crushed rock sales, all of these are imported as there is no source for crushed rock in London. Sales in London of 3.03mt have however increased in 2022 which may indicate an improvement in economic conditions. The 3 years sales average (2.59mt) for imported crushed rock in London remains lower than the 10 year sales average (3.27mt).

## Primary aggregate reserves

In London reserves of sand and gravel decreased from 3.29mt in 2021 to 2.29mt in 2022. Reserves of sand and gravel have started to decline again (Table 3), following the increase in reserves from the 2019 permitted quarry in Hounslow<sup>16</sup>.

## Secondary and recycled aggregates

The most up to date information on recycled aggregate is from the Waste Data Interrogator 2022. This data now includes all London Boroughs, previous reports only included the Boroughs with minerals. Some information on secondary and recycled aggregate was provided by operators, however as the response rate was very low, the figures in this report are for interest only and no trend data is available.

It is important to understand the data limitations associated with secondary and recycled aggregates. For recycled aggregates the information within waste data interrogator (WDI) is collected from the returns from permitted facilities and records only waste received, and waste exported from site. The data within the WDI does not account for mobile crushers or recycling and re-use that occurs on individual construction sites. The tonnage of recycled aggregates reported in the WDI is likely to only represent a proportion of the recycled aggregates in circulation.

For secondary aggregates, where certain quality protocol specifications are met, it is considered to be non-waste and is therefore not included within the waste tonnage returns.

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<sup>16</sup> P/2016/5112 (Outline) was granted permission in March 2019. P/2022/0829 Reserved Matters relating to appearance and landscaping was granted in March 2023.

## Major Construction Projects or Developments

Major construction projects have a significant effect on the demand for aggregates and their supply. Repair and maintenance of existing development stock and infrastructure represents a large proportion of construction activity and output, and so is also significant. The LAWP considers major projects across London as the basis for understanding supply requirements, as a review of all London Borough projects may be too unwieldy.

### *Housing*

The latest housing completion figures for London are set out within the London Plan AMR 17 published 2022. Net Conventional Housing Completions<sup>17</sup> is repeated below:

**Table 10: London Housing Completions**

Year	2014/15	2015/16	2016/17	2017/18	2018/19	2019/20	2020/21	2021/22
<b>Total</b>	31,531	38,450	43,748	31,000	36,096	32,342	33,365	38,044

The London Plan 2021 Table 4.1 sets out the 10 year targets for net housing completions (2019/20 -2028/29) by London Borough to provide a total of 522,870 completions by 2028/29. This provides an average annual completion rate of 52,287. This is higher than the average completion rate for the previous 8 years of 35,572.

### *Infrastructure Requirements*

The GLA prepared a technical report in 2019<sup>18</sup> to examine the cost of infrastructure to 2041. The information can provide a broad overview of the infrastructure pipeline.

#### *Transport*

The 2019 report identifies the following named projects, in addition to costing up more general infrastructure requirements:

Transport for London – Rail improvements.

- Crossrail 1 & 2
- Line extensions.
- Line upgrades.
- Enhancements
- Renewals

High Speed Rail

- 50% HS2 phase 1
- HS2
- Euston & Old Oak Common

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<sup>17</sup> [Residential completions dashboard - London Datastore](#)

<sup>18</sup> [London Infrastructure cost and funding technical report](#)



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Transport for London - Road improvements.

- A40 Westway
- A316 London Road roundabout
- Battersea Bridge safety
- Hammersmith Bridge
- Lambeth Bridge roundabouts
- Lavender Hill
- Nine Elms
- Old Street roundabout and station
- Silvertown Tunnel
- Vauxhall Cross gyratory
- Wandsworth Town Centre
- Waterloo Roundabout

Line Extensions include the Northern Line Extension, Bakerloo Line Extension and Upgrade, Elizabeth line extension, Overground, DLR and Tram network extensions.

Line Upgrades include:

- Four Lines Modernisation (Circle, District, Hammersmith & City and Metropolitan lines);
- Deep Tube Upgrade (the Piccadilly, Central and Waterloo & City lines);
- World Class Capacity (service capacity increases on the Victoria, Jubilee and Northern London Underground Lines);
- Docklands Light Railway new rolling stock and increasing the frequency of the Elizabeth line.

Enhancements includes the balance of TfL's new capital investment expenditure across all parts of TfL. Renewals expenditure is necessary to ensure the continued safe operation of transport services. Information on Transport for London (TfL) projects can be found on its website.

It is anticipated that around 30% of the funds from Network Rail Business Plan CP6 and around 30% of Train Operating Companies' funds will be spent in London.

Aviation construction has not been accounted for within the 2019 report. Policy T8 Aviation within The London Plan 2021 is specifically against expansion of Heathrow Airport and promotes better use of existing airport capacity within London.

### *Energy*

The London Environment Strategy considers four pathways to net zero in 2050. All scenarios require extensive retrofit for 70% of buildings to reach EPC C by 2030. In addition, the 2019 report identified the following infrastructure needs: electricity grid upgrades, network storage and additional generation, hydrogen grid, Electric Vehicle (EV)

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charging, and hydrogen refuelling. It is unclear at this time what the impact on aggregate demand might be.

### *Lower Thames Crossing (DCO) - at examination*

#### *Thames Tideway*

The Thames Tideway Tunnel is considered under major projects within the report but little detail is provided as it is assumed that it is to be fully funded by water companies and customers.

The project has now substantially progressed<sup>19</sup>, the tunnelling phase of the project has now been completed. The following is continuing to occur on the sites across the project area:

- Ventilation structures are being installed, many of which are being made from precast concrete;
- Secondary lining of tunnel and shafts is occurring;
- Excavations for construction of attenuation tanks;
- Architectural, operational and civil structures are being delivered;

The demand for materials for the project should therefore start to decline now that the majority of structural elements are reaching completion.

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<sup>19</sup> [Tideway | The Tunnel](#)

# Key Conclusions

At 31 December 2022, the reserves of sand and gravel in London are 2.29 million tonnes which equates to a landbank of 3.27 years this is below the minimum 7 year landbank required in the London Plan (at least 5mt). This is based on the 0.7mt per annum provision within the London Plan 2021.

Therefore based on the National and Regional Guidelines for Aggregates Provision in England 2005-2020 and the London Plan it is unlikely that the London aggregate region is making a full contribution towards meeting both national and local aggregate needs for sand and gravel<sup>20</sup> as required by the NPPG<sup>21</sup>.

- There are no crushed rock permitted reserves in London, therefore no landbank exists.

Given the reliance of London on landings of marine dredged aggregates, and imports of land-won sand and gravel as well as crushed rock, which form more than 94% of overall sales, it is critical that the infrastructure that enables this supply (wharves and rail depots) is safeguarded.

Due to the shortage of reliable data the contribution of secondary and recycled aggregates to the overall supply cannot be readily determined.

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<sup>20</sup> National and Regional Guidelines for Aggregates Provision in England 2005-2020 acknowledge there is no crushed rock resource in London so only sand and gravel apportionment requirements apply.

<sup>21</sup> 073 Reference ID: 27-073-20140306

# Appendix 1 LAWP Meetings

## [London Aggregates Working Party](#)

July 2022

### **Summary of Key Points**

LAA: The LAWP agreed to consider a way forward for the Local Aggregate Assessment at a London level, firstly through a factual update to the existing GLA 2018 LAA.

Mapping: The LAWP continued to discuss the need for a centralised mapping dataset for minerals in London, particularly in light of the new Safeguarding guidance

London Waste Planning Forum: The Secretary of the LAWP and the Chair of the LWPF agreed to attend meetings of each group to improve communication with waste and minerals planners in London.