

# **London Aggregates Working Party**

## **Annual Monitoring Report 2024 (2023 data)**

(Amended to reflect corrected data)

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# Acronyms

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

# Glossary

## **Active/Inactive sites**

Sites are described as active where material was produced at any time during 2023 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 2023 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](#). A National survey was undertaken in 2024 collecting 2023 data which is reported where appropriate in this AMR, however the report has not yet been finalised and therefore information from that survey will be fully reported in the 2025 LAWP monitoring report containing 2024 data.

LAWP sales and reserves data for 2023 was therefore collected as part of the British Geological Survey (BGS) four-year national Aggregate Minerals Survey (AM2023) undertaken in 2024. Not all data returns for this report were received in the same format, and so there may be minor differences in data or the rounding of figures when compared with the national 2024 AM2023 Report (to be published later in 2025). There are also instances where there appears to be discrepancies between the data in the AM2023 and the data published in this report, these were investigated and are due to the AM2023 methodology to prevent double counting of aggregate sales between regions.

This 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 2023, collected from the National Aggregates Minerals Survey 2024 (2023 data), and estimated where data was not available.
- The landbank in the LAWP area at 31<sup>st</sup> December 2023
- 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.

The key findings of this Annual Monitoring Report including 2023 data is as follows:

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

- Land won sales of 0.514mt from London (0.42mt in 2022)
- Land won sales imported into London using rail and water transport 0.73mt (0.77mt in 2022).
- Total Land-won Sand and Gravel Sales of 1.25mt (1.19mt total in 2022).
- Total Sand and Gravel Reserves in London of 5.27mt (2.29mt in 2022)
- Landbank of permitted reserves in London of 7.52 years (3.27 years in 2022).
- 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 4.25mt (3.03mt in 2022)

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

- Marine dredged sand and gravel sales reported 3.4mt (2.49mt for 2022).
- Marine dredged sand and gravel landed at London wharves 3.89mt<sup>1</sup> (4.06mt in 2022).

### **Secondary and Recycled Aggregate**

- Waste Data Interrogator (WDI) for whole of London 4.34mt of recycled aggregate produced.

### **Overall Primary Aggregates figures**

- Total primary aggregates sales<sup>2</sup> 8.9mt (6.71mtmt in 2022)
- Total primary aggregates reserves 5.27mt (2.29mt in 2022)

A summary of key figures for 2023 is provided in Table 1 below.

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<sup>1</sup> [Crown Estate Summary of Statistics 2023 Report](#)

<sup>2</sup> Land-won sales from London quarries were only around 6% of total sale with 94% of sales being of aggregates imported to London via wharves and rail depots.



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

<b>Aggregate</b>	<b>Sales in 2023</b>	<b>Change in sales from previous year</b>	<b>10 year sales average</b>	<b>Sales Trend</b>	<b>3 year sales average</b>	<b>Sales Trend</b>	<b>LAA/London Plan (annual provision)</b>	<b>Permitted reserves in London at 31 December 2023</b>	<b>Change in permitted reserves from previous year</b>	<b>Landbank of permitted reserves in London (years)</b>
<i>Sand and Gravel (London Only)</i>	0.514	↑	0.357	↑	0.425	↑	0.7	5.27	↑	7.52
<i>Sand and Gravel Total</i>	1.25	↑	0.97	↑	1.27	↑	N/A	5.27	↑	7.52
<i>Crushed Rock</i>	4.25	↑	3.33	↑	3.29	↑	N/A	N/A	N/A	N/A
<i>Marine sand and gravel (sales)</i>	3.4 <sup>3</sup>	↑	4.86	↓	3.5	↑	N/A	N/A	↓	22 <sup>4</sup>
<i>Total Primary Aggregates</i>	8.9	↑	9.16	↓	8.06	↑	0.70 <sup>5</sup>	5.27	↑	7.52
<i>Recycled and Secondary Aggregates</i>	4.34 <sup>6</sup>	↓	N/A	-	4.35	↑	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 2024](#)

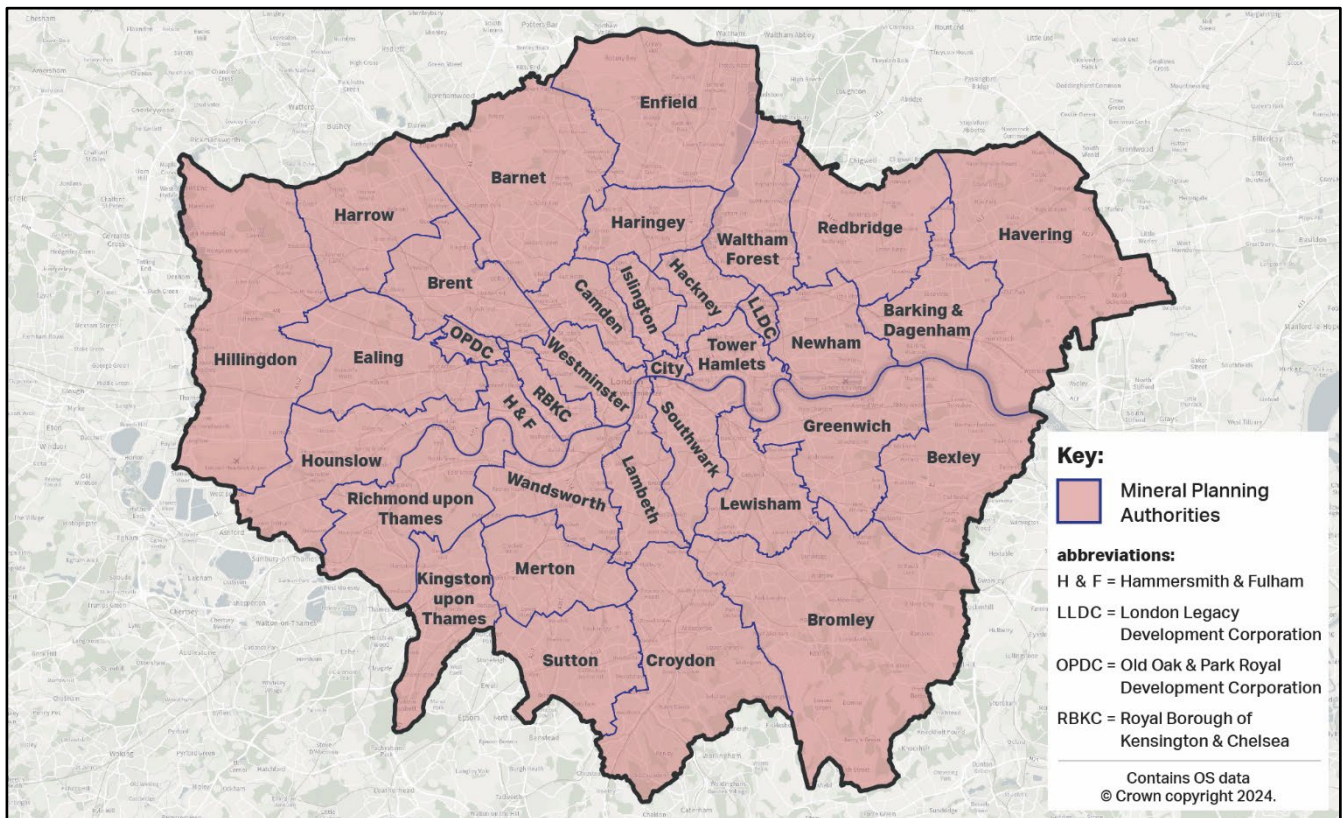
<sup>5</sup> Based on GLA LAA 2018 and Policy SI 10 within the London Plan 2021

<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.

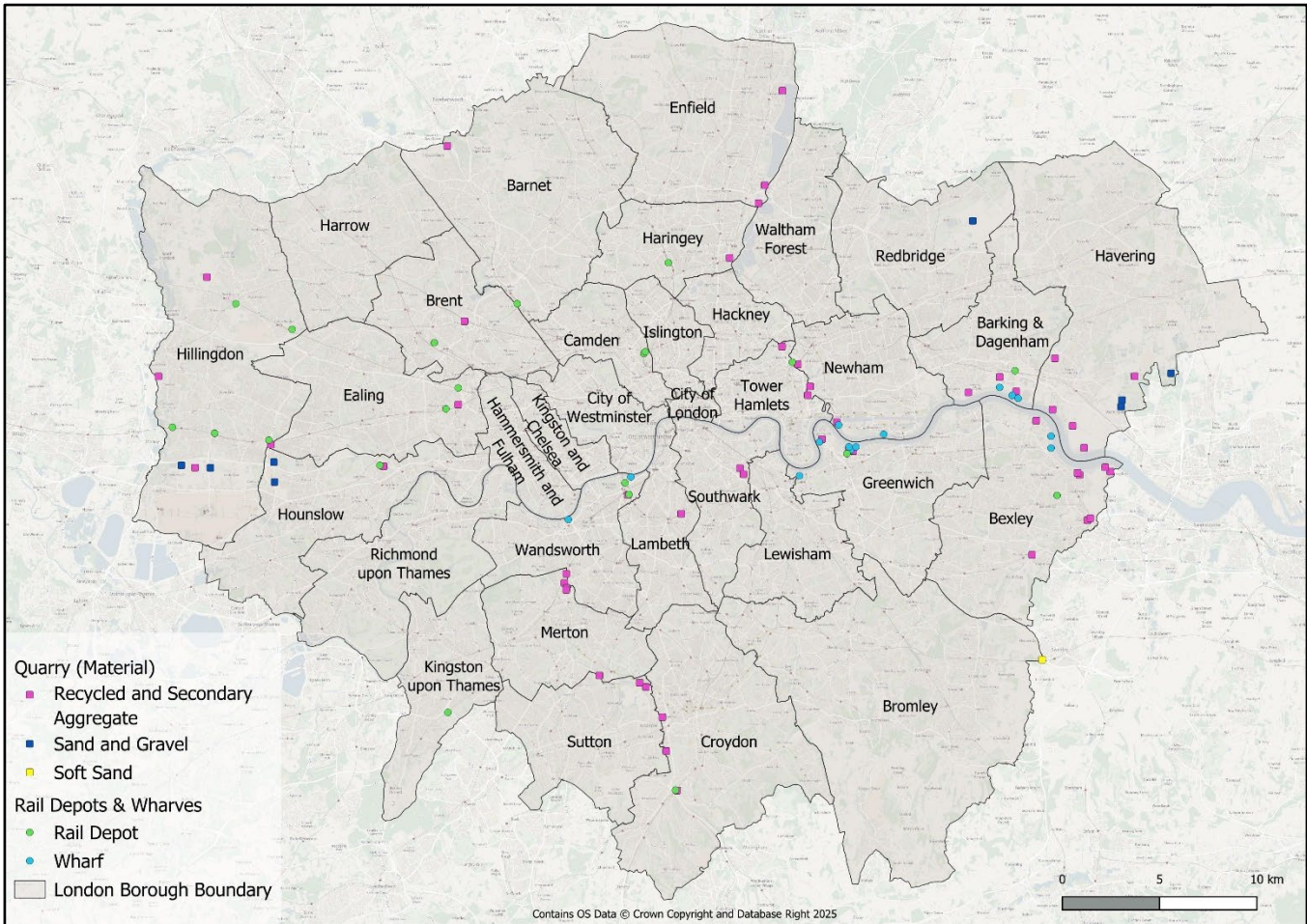
**Figure 1** London LAWP Area Mineral Planning Authorities



# Primary Aggregates

## Location of quarries, wharves and rail depots

**Figure 2** Location of quarries, recycled aggregates facilities, wharves and rail depots in 2023





# Primary Aggregates

## Sales and Imports

Information on sales of primary aggregates from quarries in London is provided in table 2. 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 National Aggregates Survey 2024 (relating to 2023 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. Some of the increases observed in this monitoring period could be attributed to an increased level of participation in the National Survey. Although with sales of all aggregates increasing it could also be accredited to improved market conditions in London.

The total Land-won Sand and Gravel Sales in 2023 extracted from within London was 0.514mt. The sand and gravel quarried in London has a 3 year average sales figure of 0.425mt and 10 year average sale of 0.357mt.

Paragraph 219(f) of the National Planning Policy Framework (NPPF) December 2023 sets out that there should be at least a 7 year landbank for sand and gravel. The provision required by 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 landbank of at least 5 million tonnes. This would equate to 0.7mtpa provision over 7 years.

Total sand and gravel sales in 2023 from land-won sources were 1.25mt, including imports through rail depots and wharves of 0.734mt. This is an increase from 2022 total land won sales figures which was 1.19mt. The average level of total sales over the last three years is 1.43mt. The ten year average of total sales for land won sand and gravel is 0.97mt.

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 from Scotland and Norway.

The total crushed rock sales in 2023 were 4.25mt. This is an increase from 2022 sales figures which were 3.03mt. Crushed rock sales in 2023 are now above both the 3 year average sales figures (3.29mt), and the 10 year average (3.32mt).

With regard to marine sand and gravel, reported sales were 3.4mt in 2023. Marine sand and gravel is often landed at a London wharf and then transported by rail across London.

As mentioned in footnote 13 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 small amounts of marine sand and gravel are landed outside London and transported into London by rail it is combined with the marine sand and gravel wharf figure for confidentiality reasons.

The 2023 figures represent marine sand sales as reported from operators. The assumption for the BGS survey (AM2023) is that where sand and gravel is reported from a wharf that this is to be counted as marine sand and gravel. In non-national survey years where the AWP undertakes its own survey, for the purposes of the AMR, wharf operators are requested to differentiate between land won sand and gravel and marine sand and gravel landed. This differentiation did not occur for 2023 data as the national survey only requested the amount of sand and gravel landed.

The AM2023 also records aggregate that is transported into London via road which is not usually captured by the AWP AMR reports.

However, to prevent double counting at a national level rail depots are not surveyed as part of the national survey. Nonetheless as rail depots deliver a significant amount of aggregate into London, rail depot figures were requested for 2023 independently of the survey. This does not create a double counting issue for the purposes of the AWP report.

Previous years sales figures for marine sand and gravel 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 2023 the Crown Estate reported that 3.89mt of marine sand and gravel were landed at wharves within London this is a decrease from the 4.06mt that was landed at London wharves in 2022.

Overall total reported sales of aggregate in London increased from 6.71mt in 2022 to 8.9mt in 2023.

Overall sales were above the ten year average of 9.16mt and above the three year average of 8.06mt.

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 (MHCLG) and the British Geological Survey (BGS). A national survey took place in 2024 collecting data for 2023. However, although the sales and reserves figures from the National Aggregate Survey have been released to the Mineral Planning Authorities to enable the LAAs and AMRs to be written the full analysis of data is still being undertaken. Therefore import data from the National Aggregate Mineral Survey 2024 will not be updated in the AMR until the 2025 (2024 data) report.

No imported aggregate data was collected exclusively by the LAWP during 2024, therefore there is no data on imports for the region for the year 2023.

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 2: Sales of Primary Aggregates (million tonnes)**

Type	Sub-category	2014	2015	2016	2017	2018	2019	2020	2021	2022	2023	10 year average	3 year average
Land won Sand and Gravel	London sourced sales from quarries	0.37	0.30	0.35	0.26	0.34	0.34	0.34	0.34*	0.42	0.514	0.357	0.425
Land won Sand and Gravel	Sales from wharves	0.1	0	0	0	0	0	0.02	-	-	-	-	-
Land won Sand and Gravel	Sales from rail depots	0.12	0.09	0.05	0.1	0.81	1.31 <sup>7</sup>	0.95 <sup>8</sup>	-	0.77	0.734 <sup>9</sup>	-	-
Land won Sand and Gravel	Total Sand and Gravel sales	<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>1.25</b>	<b>0.97</b>	<b>1.27</b>
Crushed Rock	London sourced sales	0	0	0	0	0	0	0	-	-	-	n/a	n/a
Crushed Rock	Sales from wharves	0.66	0.38	0.3	0.12	0.47	0.48	0.54	-	-	0.81	-	-
Crushed Rock	Sales from rail depots	2.46	2.74	3.95	3.66	3.02	3.03	1.6	-	-	3.44	-	-
Crushed Rock	Crushed rock totals	<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>4.25</b>	<b>3.33</b>	<b>3.29</b>
Marine won Sand and Gravel	Sales from wharves	4.59	4.95	5.39	5.02	4.67	4.44	2.75	4.61	2.49	-	-	-

<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.

<sup>9</sup> Combined figure of land won and marine sand and gravel 2023 from rail depots to maintain confidentiality.

London AWP – AMR 2024

Type	Sub-category	2014	2015	2016	2017	2018	2019	2020	2021	2022	2023	10 year average	3 year average
Marine won Sand and Gravel	Sales from rail depots	1.11	1.49	1.56	1.56	0.57	0 <sup>10</sup>	0 <sup>11</sup>	-	0 <sup>12</sup>	-	-	-
Marine won Sand and Gravel	Total Sales	5.7	6.44	6.95	6.58	5.24	4.44	2.75	4.61	2.49	3.40 <sup>13</sup>	4.86	3.5
Total	Total Aggregate Sales	9.41	9.95	11.6	10.72	9.88	9.60	6.20	8.58	6.71	8.90	9.16	8.06

<sup>10</sup> Combined figure of land won and marine sand and gravel figure 2019 from rail depots – recorded as 0 to avoid double counting.

<sup>11</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>12</sup> Recorded as 0 to avoid double counting.

<sup>13</sup> Combined figure of marine sand and gravel sold from rail depots and wharves in 2023 to maintain confidentiality.



## Permitted Reserves

The permitted reserves of sand and gravel and crushed rock in the LAWP area at 31 December 2023 are set out in Table 3 below.

The permitted reserves for sand and gravel in London at 31 December 2023 were 5.27mt. This represents an increase in permitted reserves from 2.29mt in 2022.

This increase is due to there being a better response from operators and the granting of a permission for the extraction of 700,000 tonnes of sand and gravel over a period of 7 years at a maximum annual extraction rate of 100,000 tonnes per annum<sup>14</sup>.

Another addition to the permitted reserves was the Rectory Farm permission which was granted in 2019<sup>15</sup> and again in 2022 and was not reflected in previous reports, this permission has not yet commenced. For the purposes of the 2023 reporting year it is however considered an active consent and the reserves figure has been included in the figures presented in this report.

As previously stated in the report, there are no crushed rock permitted reserves in London. Regarding wharves' capacity the GLA undertook a Review<sup>16</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.

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<sup>14</sup> Hounslow application P/2020/4001

<sup>15</sup> Hounslow applications P/2016/5112 granted on 23/03/2019 and P/2022/0829 granted 06/03/23

<sup>16</sup> [Safeguarded Wharves Review 2019](#)

**Table 3      *Reserves in London (million tonnes)***

<b>Aggregate</b>		<b>2012</b>	<b>2013</b>	<b>2014</b>	<b>2015</b>	<b>2016</b>	<b>2017</b>	<b>2018</b>	<b>2019</b>	<b>2020</b>	<b>2021</b>	<b>2022</b>	<b>2023</b>
<b>Sand &amp; Gravel</b>	<b>London</b>	1.18	1.37	0.7	1.40	1.32	2.21	3.38	3.19	4.65	3.27	2.29	5.27
<b>Sand &amp; Gravel</b>	<b>Total Permitted Reserves</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>	<b>5.27</b>
<b>Crushed rock</b>	<b>London</b>	0	0	0	0	0	0	0	0	0	0	0	0
<b>Crushed rock</b>	<b>Total Permitted Reserves</b>	0	0	0	0	0	0	0	0	0	0	0	0
<b>Crushed rock</b>	<b>Total permitted reserves</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>	<b>5.27</b>

## 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 sand and gravel 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 supply of 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 2023 is estimated to be 5.27mt with a landbank of 7.52 years if the full 0.7mt apportionment is extracted. The reserves are therefore only marginally above the requirement of the London Plan (5mt). Consequently London is making a sufficient contribution towards the National supply of land won aggregates.

The figure of 7.52 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 0.357mt is used to calculate the landbank of sand and gravel then the figure is 14.75 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 (million tonnes)**

<b>Aggregate</b>	<b>Annual rate of future demand based on the latest annual LAA</b>	<b>LAA Rate is 10 years sales average</b>	<b>Annual Rate of future demand based on 10 years sales average</b>	<b>Reserves (as of 31<sup>st</sup> December 2023) or capacity</b>	<b>Landbank in years (as at 31<sup>st</sup> December 2023)</b>
<b>Land-won Sand and Gravel, London quarries</b>	0.7	No	0.357	5.27	7.52
<b>Total Sand &amp; Gravel</b>	0.7	N/A		-	-

## Secondary and Recycled Aggregates

In London 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.

CD&E Waste arisings are now calculated based on the guidance produced by a number of Waste Technical Advisory Bodies (WTABS) with input from members of aggregate working parties across the country. This was introduced in January 2024. The Produced and Managed figures shown in Table 5 are for the whole of London. Due to the change in methodology introduced by the guidance these figures are not comparable to figures in reports prior to the 2023 AMR (2022 data). 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 447,228 tonnes of secondary and recycled aggregate.

## National Data

**Table 5** *CD&E Waste Arisings (Environment Agency 2021<sup>17</sup>, 2022<sup>18</sup>, 2023<sup>19</sup>)*

Mineral Planning Area	Amount Produced (tonnes)	Amount Managed (tonnes)
London 2021	4,270,233	4,298,511
London 2022	4,460,679	4,381,687
London 2023	4,335,726	4,332,505
<b>3 year average</b>	<b>4,355,546</b>	<b>4,337,568</b>

<sup>17</sup> [2021 Waste Data Interrogator - data.gov.uk](https://data.gov.uk)

<sup>18</sup> [2022 Waste Data Interrogator - data.gov.uk](https://data.gov.uk)

<sup>19</sup> [2023 Waste Data Interrogator](https://data.gov.uk)

# 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 as of December 31 2023**

Mineral Planning Authority / Authorities	Plan Name/Mineral DPD	Preparation stage / Current Status in 2023	Status in 2022
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	In examination
Barnet	Core Strategy	Adopted 2012	Adopted 2012
Barnet	Development Management Policies	Adopted 2012	Adopted 2012
Barnet	New Local Plan	In examination	In examination
Bexley	Bexley Local Plan	Adopted 2023	In examination
Brent	West London Waste Plan	Adopted 2015	Adopted 2015
Brent	New Brent Local Plan 2019 -2041	Adopted 2022	Adopted 2022
Bromley	Local Plan	Adopted 2019	Adopted 2019
Bromley	Local Plan Review	Issues & Options	N/A
Camden	Local Plan	Adopted 2017	Adopted 2017
Camden	Local Plan Review	In preparation	Initial consultation
Camden	North London Waste Plan	Adopted 2022	Adopted 2022
City of London	Local Plan	Adopted 2015	Adopted 2015
City of London	City Plan 2040	Regulation 19	Regulation 19
Croydon	Local Plan	Adopted 2018	Adopted 2018
Croydon	Local Plan Review	Regulation 19	Regulation 19
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	Regulation 18
Ealing	West London Waste Plan	Adopted 2015	Adopted 2015

<b>Mineral Planning Authority / Authorities</b>	<b>Plan Name/Mineral DPD</b>	<b>Preparation stage / Current Status in 2023</b>	<b>Status in 2022</b>
Enfield	Core Strategy 2010-2025	Adopted 2010	Adopted 2010
Enfield	New Local Plan	Regulation 18	Regulation 18
Enfield	North London Waste Plan	Adopted 2022	Adopted 2022
Greenwich	Royal Greenwich Local Plan: Core Strategy with Detailed Policies	Adopted 2014	Adopted 2014
Greenwich	Draft Local Plan	In preparation	N/A
Hackney	Local Plan (LP33)	Adopted 2020	Adopted 2020
Hammersmith and Fulham	Local Plan	Adopted 2018	Adopted 2018
Havering	Local Plan	Adopted 2021	Adopted 2021
Haringey	Strategic Policies	Adopted 2013 (with alterations 2017)	Adopted 2013 (with alterations 2017)
Haringey	Development Management DPD	Adopted 2017	Adopted 2017
Haringey	New Local Plan	In preparation	In preparation
Haringey	North London Waste Plan	Adopted 2022	In examination
Harrow	Local Plan	Adopted 2012	Adopted 2012
Harrow	New Local Plan	Regulation 18	In preparation
Hillingdon	Local Plan: Part 1 Strategic Policies	Adopted Nov 2012	Adopted 2012
Hillingdon	Part 2 (LPP2): Development management policies, site allocations & policies map	Adopted Jan 2020	Adopted 2020
Hillingdon	New Local Plan	In preparation	N/A
Hounslow	Hounslow Local Plan 2015-30 Volume 1	Adopted 2015	Adopted 2015
Hounslow	Hounslow Local Plan 2015-30 Volume 2	Adopted 2015	Adopted 2015
Hounslow	Single Local Plan	Regulation 18	In preparation
Hounslow	West London Waste Plan	Adopted 2015	Adopted 2015
Islington	New Local Plan	Adopted 2023	In examination
Kingston Upon Thames	Core Strategy	Adopted 2012	Adopted 2012
Kingston Upon Thames	South London Waste Plan	Adopted 2022	In examination

<b>Mineral Planning Authority / Authorities</b>	<b>Plan Name/Mineral DPD</b>	<b>Preparation stage / Current Status in 2023</b>	<b>Status in 2022</b>
Kingston Upon Thames	New Local Plan	Regulation 18	Regulation 18
Lambeth	Local Plan	Adopted 2021	Adopted 2021
Lewisham	Core Strategy	Adopted 2011	Adopted 2011
Lewisham	Site Allocations Local Plan	Adopted 2013	Adopted 2013
Lewisham	Development Management Local Plan	Adopted 2014	Adopted 2014
Lewisham	New Local Plan	Regulation 19	Regulation 18
London Legacy Development Corporation	Local Plan	Adopted 2020	Adopted 2020
Merton	Core Planning Strategy	Adopted 2011	Adopted 2011
Merton	Sites and Policies Plan and Policies Plan	Adopted 2014	Adopted 2014
Merton	Local Plan	In examination	In examination
Newham	Local Plan	Adopted 2018	Adopted 2018
Newham	New Local Plan	Regulation 18	In preparation
Newham	North London Waste Plan	Adopted 2022	Adopted 2022
Old Oak and Park Royal Development Corporation	Local Plan	Adopted 2022	In examination
Richmond upon Thames	Local Plan	Adopted 2020 (Amended)	Adopted 2018
Richmond upon Thames	West London Waste Plan	Adopted 2015	Adopted 2015
Richmond upon Thames	New Local Plan	Regulation 19	Regulation 18
Redbridge	London Plan	Adopted 2018	Adopted 2018
Redbridge	Minerals Local Plan	Adopted 2012	Adopted 2012
Southwark	Local Plan	Adopted 2022	Adopted 2022
Sutton	Local Plan	Adopted 2018	Adopted 2018
Sutton	New Local Plan	In preparation	N/A
Sutton	South London Waste Plan	Adopted 2022	In examination
Tower Hamlets	Local Plan	Adopted 2020	Adopted 2020



<b>Mineral Planning Authority / Authorities</b>	<b>Plan Name/Mineral DPD</b>	<b>Preparation stage / Current Status in 2023</b>	<b>Status in 2022</b>
Tower Hamlets	New Local Plan	Regulation 18	In preparation
Wandsworth	New Local Plan	Adopted 2023	In examination
Wandsworth	South London Waste Plan	Adopted 2022	In examination
Waltham Forest	Core Strategy	Adopted 2012	Adopted 2012
Waltham Forest	Development Management Policies	Adopted 2013	Adopted 2013
Waltham Forest	New Local Plan Part 1: Strategic Policies (LP1)	In examination	In examination
Waltham Forest	New Local Plan Part 2: Site Allocations (LP2)	Regulation 18	In preparation
Waltham Forest	North London Waste Plan	Adopted 2022	Adopted 2022
Westminster	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>Mineral Planning Authority</b>	<b>Site name</b>	<b>Type</b>	<b>Operator</b>	<b>Grid Ref</b>
<b>Bexley</b>	Anchor Bay Wharf	Recycled and Secondary Aggregate	Erith Remediation Technologies Ltd	552777 177820
<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>Mineral Planning Authority</b>	<b>Site name</b>	<b>Type</b>	<b>Operator</b>	<b>Grid Ref</b>
<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
<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>	Ferne 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>Mineral Planning Authority</b>	<b>Site name</b>	<b>Type</b>	<b>Operator</b>	<b>Grid Ref</b>
<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
<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	Former Investments Ltd	510887 177445

<b>Mineral Planning Authority</b>	<b>Site name</b>	<b>Type</b>	<b>Operator</b>	<b>Grid Ref</b>
<b>Hounslow</b>	South Of WIM Southall Lane	Sand and Gravel Quarry	Quattro	510851 178367
<b>Hounslow</b>	South Of WIM Southall Lane	Recycled and Secondary Aggregate	Quattro	510851 178367
<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>Kingston upon Thames</b>	Tolworth	Rail Depot	Day Aggregates	519800 165500
<b>Kingston Upon Thames</b>	Chessington Rail Depot	Rail Depot	Cappagh	517854 163121
<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>Mineral Planning Authority</b>	<b>Site name</b>	<b>Type</b>	<b>Operator</b>	<b>Grid Ref</b>
<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
<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>Wands-worth</b>	Battersea Wharf (Cringle)	Wharf	CEMEX	529200 177600
<b>Wands-worth</b>	Pier Wharf	Wharf	Hanson Aggregates	526000 175400
<b>Wands-worth</b>	Battersea	Rail Depot	Day Aggregates	528900 177300
<b>Wands-worth</b>	Battersea	Rail Depot	Tarmac Ltd	529100 176700
<b>Wands-worth</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 in 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 2023.

**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
Redbridge	Fairlop Quarry, Plant, Hainault Road, Romford, Redbridge, RM6 5SS	Brett Tarmac Ltd	N/A	Erection of a temporary concrete structure located in the centre of the plant site (structure to be removed by 31st March 2024)	4/5/23	Granted 21/6/23
Redbridge	Fairlop Quarry, Hainault Road, Romford	Brett Tarmac Ltd	N/A	2089/16/10 Discharge of conditions of approved permission 2089/16: Excavation Maintenance and Management Scheme (Condition 36); Biodiversity Areas (Condition 37) and Schedule 3 of attendant S106 agreement (summary)	17/1/23	Granted 28/9/23
Hounslow	Land At South Of Wim Southall Lane, Southall	Quattro	N/A	P/2023/1757 - Non-material amendment	02 /6/ 2023	20 /12/ 2023. No further action
Hounslow	Land At South Of Wim Southall Lane, Southall	Quattro	700,000	P/2020/4001 The extraction of Sand and Gravel, Importation and Recycling of Secondary Aggregate including the installation and operation of an aggregate processing plant	17 /11/ 2020	Granted 26/05/ 2023



Mineral Planning Authority	Site Name and Location (Grid Reference)	Operator / Applicant	Tonnage (for aggregate use)	Type of Application	Date Submitted	Decision
Hounslow	Rectory Farm, 250 Cranford Lane, Hounslow, TW5 9PJ	Formal Investments Limited	N/A	Reserved matters application for appearance, landscaping, layout and boundary treatment under parts a, b, c and d of condition 6 (reserved matters) for the area around and including the proposed new storage and maintenance shed on the southern part of the site following outline planning permission 00315/E/P19 approved 29/03/2019 for the extraction of minerals and all necessary enabling works;	10 March 2022	Granted 06 March 2023
Redbridge	Fairlop Quarry, Plant, Hainault Road, Romford, Redbridge, RM6 5SS	Capital Concrete	N/A	1178/23 Erection of a temporary concrete structure located in the centre of the plant site (structure to be removed by 31st March 2024)	04/05/2023	Granted 21/06/2023
Redbridge	Fairlop Quarry, Plant, Hainault Road, Romford, Redbridge, RM6 5SS	Brett Tarmac Ltd	N/A	2089/16/10 Discharge of conditions of approved permission 2089/16: Excavation Maintenance and Management Scheme (Condition 36)	17/01/2023	Granted 28/09/2023

Mineral Planning Authority	Site Name and Location (Grid Reference)	Operator / Applicant	Tonnage (for aggregate use)	Type of Application	Date Submitted	Decision
Redbridge	Former Quarry Site D At Aldborough Hatch, Aldborough Road North, Newbury Park, Ilford	Brett Fairlop Ltd	N/A	4179/14/03 Application for a Satisfactory Completion Certificate under Condition 42 of Planning Consent 4179/14.	07 / 11/ 2023	Granted 05 /12/ 2023
Redbridge	Fairlop Quarry, Hainault Road, Romford	Brett Fairlop Ltd	N/A	3289/23 Application to vary S106A agreement under ref 2089/16.	07/11/ 2023	Withdrawn 12 Dec 2023

## 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>LAA Figure - Sand and Gravel</b>	<b>LAA Figure - Crushed Rock</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 0.514mt, as per 2023 and the 2022 figure of 0.42 are the highest recorded sales 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 3.4mt in 2023. The total of marine won sand and gravel sales have increased by 0.91mt from 2.49mt in 2022, although as previously explained in this report, the marine aggregate overall figures should be treated with a degree of caution.

In terms of crushed rock sales, all of this resource is brought into London from either quarries in England and Wales, or from sources in Scotland or Europe, as there is no source for crushed rock in London. Sales in London have increased in 2023 to 4.25mt which may indicate an improvement in economic conditions. The 3 years sales average (3.29mt) for crushed rock in London remains marginally lower than the 10 year sales average (3.32mt).

## Primary aggregate reserves

In London reserves of sand and gravel increased from 2.29mt in 2022 to 5.27mt in 2023. This is as a result of more operators participating in the BGS Survey than have provided information to the previous AWP surveys and planning permission being granted for the extraction of 700,000 tonnes of sand and gravel over a period of 7 years at a maximum annual extraction rate of 100,000 tonnes per annum<sup>20</sup>.

## Secondary and recycled aggregates

The most up to date information on recycled aggregate is from the Waste Data Interrogator 2023. 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.

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<sup>20</sup> Hounslow application P/2020/4001

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.

## 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 19 published 2024. Net Conventional Housing Completions<sup>21</sup> is repeated below:

**Table 10: London Housing Completions**

Year	2015/16	2016/17	2017/18	2018/19	2019/20	2020/21	2021/22	2022/23	2023/24
<b>Total</b>	38,450	43,748	31,000	36,096	32,342	33,365	38,044	35,019	32,739

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 9 years of 35,645.

### Infrastructure Requirements

The GLA prepared a technical report in 2019<sup>22</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

<sup>21</sup> [Residential completions dashboard - London Datastore](#)

<sup>22</sup> [London Infrastructure cost and funding technical report](#)

## High Speed Rail

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

## 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) 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 been substantially completed<sup>23</sup>. Work is now being undertaken to bring the system into full operation. This involves connecting the remaining discharge points to the new super sewer and testing the entire system during different weather conditions, including heavy storms.

While the final phases are now underway on the tunnel, work continues above ground to finish the new riverside public spaces being created as part of the project, with project on track for final completion for 2025.

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<sup>23</sup> [Tideway | The Tunnel](#)

# Key Conclusions

At 31 December 2023, the reserves of sand and gravel in London are 5.27 million tonnes which equates to a landbank of 7.52 years, this is slightly over 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 the London aggregate region is currently making a sufficient contribution towards meeting both national and local aggregate needs for sand and gravel<sup>24</sup> as required by the NPPG<sup>25</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 90% 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>24</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>25</sup> 073 Reference ID: 27-073-20140306



# Appendix 1 LAWP Meetings

## London Aggregates Working Party

### **February 2023**

#### **Summary of Key Points**

LAA: The LAWP continued 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.

LAWP AMRs: Discussion was had on the progress of the Annual Monitoring Reports.

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 including wharves and railheads.