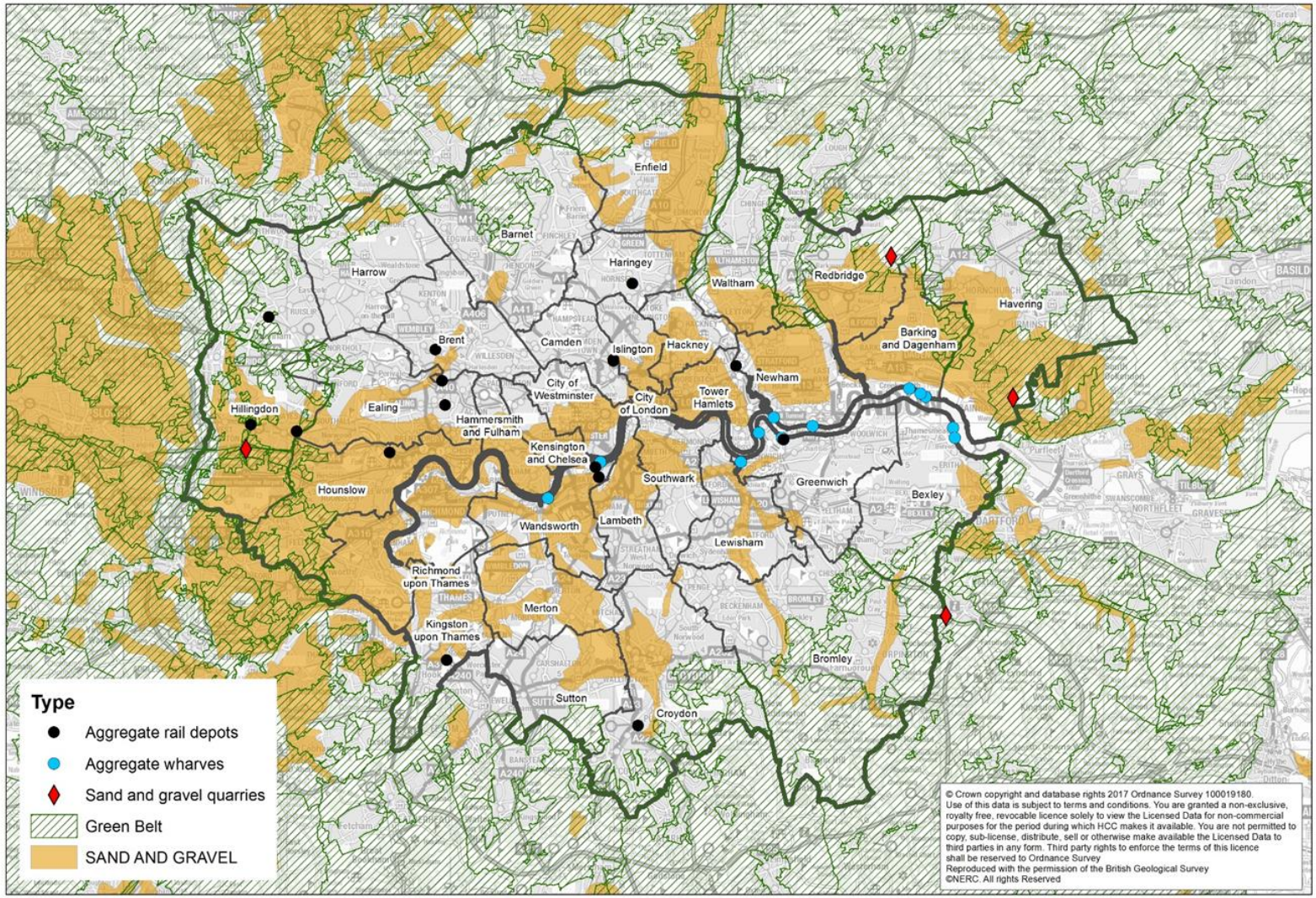
# London Aggregates Working Party

# Annual Report 2019

**LAWP** London Aggregates Working Party

December 2020

## Figure 1: Location of quarries, wharves, and rail depots - 2018



## Executive Summary

- The London Aggregates Working Party (LAWP) Annual Report 2019 is the latest of a series beginning in 2003. However, as the Aggregates Monitoring (AM) 2019 survey has not been completed by the British Geological Survey (BGS) the latest data is based on estimates supported by evidence from other sources. Any conclusions need to be considered as provisional with the expectation that they need revising in next year's Report.
- The LAWP principally comprises representatives of aggregates companies and local government in London. There are Aggregates Working Parties (AWPs) for the regions of England and Wales.
- The National Planning Policy Framework (NPPF), Planning Practice Guidance (PPG) provided the policy framework for aggregates supply and the role of AWPs. The London Plan sets out aggregates policy for London.
- The LAWP met twice during 2019. It agreed the 2018 Annual Report and considered policy and planning practice matters affecting aggregates supply.
- The estimated AM 2019 results indicate an overall small decline (-3.7%) in aggregates sales. However, quarry reserves have remained at five-years, although a recent permission subject to legal agreement would increase the landbank to nine-years, the highest for more than a decade. Other than this, local supply London is dependent on marine and imported aggregates, which rely on the limited capacity of the wharves and rail depots
- Table 8 below consolidates the critical AM 2019 information by providing a summary assessment of London's aggregates position.
- The LAWP concludes that although London has only a five-year land bank it continues to contribute to national and local aggregates requirements and once planning permission has been issued in Hounslow it would make a full contribution. The LAWP also notes that aggregates supply to London is heavily dependent on marine and imported aggregates so the supporting infrastructure capacity is an essential contribution to aggregates requirements. This stresses the need for this infrastructure capacity to be continually monitored and safeguarded.

## Contents

# 1 Introduction

1.1 The London Aggregates Working Party (LAWP) has published Annual Reports (also known as Aggregates Monitoring Reports) since it was first formed in 2003.

1.2 A major feature of the Annual Report has been the results of the latest Aggregates Monitoring (AM) survey. The survey for 2019 was delayed by the impact of Covid 19 and results are unlikely to be published before 2021. Nevertheless, there is some aggregates information that can be used to estimate sales and reserves. Any conclusions arising from the estimates are provisional and when more accurate data is available it will be incorporated in subsequent Annual Reports.

1.3 Otherwise, the Report does cover matters arising from Working Party meetings, it also provides an updated list of aggregates sites in London, planning decisions and progress on mineral policy in development plans.

# 2 Policy Context for the LAWP

2.1 The national planning context for the work of the LAWP is the National Planning Policy Framework (NPPF)[1] and Planning Practice Guidance (PPG)[2] which provides advice on the national Managed Aggregate Supply System (MASS). The strategic planning context for the work of the LAWP is the London Plan

## National Planning Policy Framework (NPPF)

2.2 The NPPF (para 207) states that minerals are essential to support economic growth and our quality of life it therefore requires mineral planning authorities – the London Boroughs - to plan for a steady and adequate supply of aggregates by:

- Preparing an annual Local Aggregates Assessment (LAA), either individually or jointly by agreement with other mineral Planning authorities (mpas);
- Participating in the operation of an Aggregates Working Party and taking the advice of the AWP into account when preparing their LAA; and
- Making provision for the land-won and other elements of their LAA in their mineral local plans, considering the advice of the AWP and the National Aggregates Coordinating Group.

2.3 A revised NPPF was published in 2019, however it made no substantive changes to minerals policy. It is noted that the Planning White Paper [3] published during 2020 likewise makes no reference to mineral planning and the LAWP responded fully to the consultation during 2020.

[1] https://www.gov.uk/government/uploads/system/uploads/attachment_data/file/6077/2116950.pdf - para 207
[2] http://planningguidance.communities.gov.uk/
[3] https://www.gov.uk/government/consultations/planning-for-the-future

## Planning Policy Guidance (PPG)

2.4 The PPG refers to the Managed Aggregate Supply System (MASS). This seeks to ensure a steady and adequate supply of aggregate mineral by managing significant geographical imbalances in the occurrence of aggregate resources. The Guidance describes the process in which LAAs are a key element in assessing whether a steady and adequate supply of aggregates is being maintained. Aggregates Working Parties are required to draw together the conclusions of all the LAAs in its area and advise whether, in its view, it is making a full contribution towards meeting both national and local needs.

2.5 The PPG was also revised in 2018 and now advises that AWPs should be treated as additional signatories to statements of common ground (SoCG) when mineral plans are prepared. The LAWP expects to be a signatory to SoCGs that cover aggregates policies in Borough local plans.

## The London Plan

2.6 The London Plan[4], published in March 2016, to include alterations since the original publication in July 2011, is the strategic plan for the Capital. However, its replacement is in the final stages for adoption and the Mayor issued an intention to publish[5] in December 2019.

2.7 The new 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:

a. 0.75 million tonnes to Havering LB.
b. 0.7 million tonnes to Redbridge LB.
c. 1.75 million tonnes to Hillingdon LB.
d. 0.7 million tonnes to Hounslow LB.

(This in effect requires provision to be made London-wide for at least 0.7mtpa – approximately 0.25mtpa each for Havering and Hillingdon and, 0.125mtpa for Hounslow and Redbridge).

2.8 The London Plan recognises that there remains potential for extraction beyond the identified four boroughs identified. Other boroughs with aggregates resources should consider opportunities in line with policies in the London Plan including safeguarding aggregate resources in their local plans.

[4] https://www.london.gov.uk/what-we-do/planning/london-plan
[5] https://www.london.gov.uk/sites/default/files/intend_to_publish_-_clean.pdf

2.9 The London Plan also reflects the NPPF in seeking to maximise recycling and re-use of construction, demolition, and excavation (CDE) wastes and the Boroughs should support the development of aggregate recycling facilities in their local plans. Moreover, in recognition of the heavy dependence of London on imports of crushed rock and marine (dredged) aggregates, the London Plan requires the Boroughs local plans to safeguard wharves and rail heads for aggregate distribution.

## 3 The London Aggregates Working Party (LAWP)

3.1 The LAWP membership comprises representatives of the London Boroughs and the aggregates industry with operations in the Capital. The principal functions of the LAWP are to monitor aggregates supply and provide advice to planning authorities and Government on whether London 'is making a full contribution towards meeting both national and local aggregate needs'[6].

3.2 During 2019 the LAWP met twice and the following matters were considered:

- The Annual Report 2018 was discussed and agreed and subsequently submitted to MHCLG.
- Engaged in the preparation of the London Plan including the submission of evidence and attendance at the EIP.
- Engaged with the London Boroughs (mineral planning authorities), particularly over of safeguarding aggregates facilities. (A LAWP representative subsequently attended the London Waste Planning Forum to explain the aggregates issue to the Boroughs).
- Response to the Draft South East Marine Plans.
- Response to the consultation on the Heathrow Expansion regarding construction minerals supply and safeguarding resources and infrastructure.
- Response to the Leicestershire LAA consultation that included a concern, subsequently raised with the Ministry of Housing, Communities, and Local Government (MCLG) about the prospect for long-term supply via rail.
- Prospects for a joint LAA for all of London and subsequent raising the matter with MHCLG and the Association of London Borough Planning Officers.
- Response to the consultation on the 'Planning for the Future' White Paper

3.3 The minutes for the meetings can be found on the LAWP website hosted by the GLA[7].

[6] http://planningguidance.communities.gov.uk/ - para 73
[7] https://www.london.gov.uk/what-we-do/planning/who-we-work/planning-working-groups/london-aggregates-working-party

# 4 Aggregates Monitoring (AM) 2019

4.1 The Aggregates Monitoring surveys are a core activity of the AWPs as they provide the essential data that allows effective monitoring of the MASS. The surveys are carried out annually, and periodically the results are collated for England and Wales to provide a national picture of aggregates supply, including movements between AWP areas. The last of these national surveys to be completed was for 2014.

4.2 A further survey for 2019 is currently underway, but the results are unavailable, because of delays caused by the Covid 19 pandemic, in time for publication of the LAWP Annual Report. Accordingly, sales and reserves of aggregates are estimated and are included in the tables in the Report and provide the basis for its conclusions. In due course the data from AM 2019 will be reported as part of AM 2020 in that year's Annual Report.

4.3 The location of the primary aggregate sites, including aggregate handling infrastructure, the wharves and rail depots, are illustrated on Figure 1 at the beginning of the Report. Figure 1 also indicates the extent of sand and gravel resource within London. Appendix 1 lists the aggregates quarries, wharves, and rail depots in London. Also included are the principal fixed sites for processing recycled and secondary aggregates published by the Environment Agency in its Waste Data Interrogator (WDI).

## Aggregates in London

4.4 The general pattern of aggregate sales and consumption in London from 2001 to 2014 are illustrated in Table 1 (estimated sales for 2019 have been included for a partial comparison). The main features are:

- Sales of primary aggregate are quite steady throughout the period, including up to 2019 at about 4.5 to 5.0mt - the lower figure in 2009 seems to reflect the recession.
- Only about 7% of sales in 2014, were from London's own aggregates resources that is indigenous and quarried sand and gravel sales– this represent 4% of aggregates consumption for the Capital. London's aggregate needs are met predominantly by supplies from elsewhere in England & Wales (including marine dredged sand and gravel landed at the Thameside wharves for processing) together with other imports.
- The consumption data shows that overall, this has been generally quite steady at about 9.5Mt.
- Generally, consumption is 20% sand and gravel (most of which is imported); 40% marine sand and gravel and 40% imported crushed rock (largely by rail).

4.5 The geographic of pattern of imports and exports of aggregates in 2014 is shown in Table 2A and 2B:

- Of the 5.9Mt of London's imported aggregates 1.6Mt (65%), is crushed rock, of which 39% is from the South West, probably Somerset, 21% from outside

England and Wales, and 15% from the East Midlands, probably Leicestershire.

- London also imports 1.6Mt of quarried sand and gravel of which 63% is from the East off England.
- Despite being a large importer of aggregates London does export 1.4Mt, although 90% is of marine dredged origin and about 75% of that is to the East of England.

### Table 1: Sales/consumption of sand and gravel and crushed rock: 2001-2014/2018

Thousand tonnes

| | Aggregate Sales | | | | | | | |
|---|---|---|---|---|---|---|---|---|
| | Sand and Gravel | | | | Crushed Rock | | Total Primary Aggregate | |
| | Quarried | % | Marine | % | Quarried | % | Tt | % |
| **2001** | 837 | 18 | 3,725 | 82 | 0 | 0 | 4,562 | 100% |
| **2005** | 1,038 | 20 | 4,035 | 80 | 0 | 0 | 5,073 | 100% |
| **2009** | 577 | 14 | 3,662 | 86 | 0 | 0 | 4,239 | 100% |
| **2014** | 376 | 7 | 4,678 | 93 | 0 | 0 | 5,054 | 100% |
| **2019** | 342 | 7 | 4,440 | 93 | 0 | 0 | 4,782 | 100% |
| | **Aggregate Consumption** | | | | | | | |
| **2001** | 2,021 | 21 | 5,090 | 53 | 2,453 | 26 | 9,563 | 100% |
| **2005** | 2,185 | 21 | 4,278 | 41 | 3,892 | 38 | 10,355 | 100% |
| **2009** | 1,459 | 16 | 3,824 | 41 | 4,086 | 44 | 9,369 | 100% |
| **2014** | 1,834 | 19 | 3,849 | 40 | 3,890 | 41 | 9,573 | 100% |
| **2019** | n/a | n/a | n/a | n/a | n/a | n/a | n/a | n/a |

**Source:** AM2001, 2005, 2009, 2014 National Collations (BGS), LAWP 2018 estimates

### Table 2A: Exports of sand and gravel and crushed rock: 2014

Thousand tonnes

| Aggregates | | Sales within London | Exports to: | | | | | | |
|---|---|---|---|---|---|---|---|---|---|
| | | | SW | SE | East | E Mid. | S Wales | Oth er | All sales outside London |
| Sand and Gravel | Quarried | 245 | 0 | 131 | | 0 | 0 | 0 | 131 |
| | Marine | 3,392 | 0 | 329 | 956 | 0 | 0 | 0 | 1,285 |
| | **Total** | 3,637 | 0 | 460 | 956 | 0 | 0 | 0 | 1,416 |
| **Crushed Rock** | | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 |
| **Total** | | **3,637** | | **460** | **956** | | | | **1,416** |

### Table 2B: Imports of sand and gravel and crushed rock: 2014

Thousand tonnes

| Aggregates | | Total Imports to London | Imports from: | | | | | | |
|---|---|---|---|---|---|---|---|---|---|
| | | | SW | SE | East | E Mid. | S Wales | Other | Outside England & Wales |
| Sand and Gravel | Quarried | 1,590 | 93 | 495 | 1,001 | 0 | 0 | 1 | 0 |
| | Marine | 456 | | 387 | 70 | 0 | 0 | 0 | 0 |
| | **Total** | **2,046** | **93** | **882** | **1,071** | **0** | **0** | **1** | **0** |
| **Crushed Rock** | | **3,888** | **1,505** | **2** | **10** | **890** | **173** | **72** | **1,236** |
| **Total** | | **5,935** | **1,598** | **884** | **1,081** | **890** | **173** | **73** | **1,236** |

**Source:** AM 2014 National Collation (BGS

## Quarries

4.6 In 2019, there were six sand and gravel quarries in London – see Appendix A for details – although two had not commenced extraction and another was almost was depleted of reserves. Additionally, there is another quarry subject to to finalisation of planning permission – see Appendix C. Finally, there is also a soft sand quarry (which has not provided any AM information for some years) in Bromley - see Figure 1 – but this is judged to have an insignificant contribution to the London aggregate picture. The reserves in 2009 were less than 0.2Mt.

4.7 The main matters of note about sales and reserves over the last decade - Table 3 below - are:

- Quarried sharp sand and gravel sales it is estimated have stayed about the same as 2018, but this does not depart from the general decline over the last decade.
- The landbank of permitted reserves, based on the London Plan requirement of 700,000 tonnes per year, has been maintained at 5 years, but if the permission in Hounslow is considered the landbank would be 9 years, the largest over the last decade.
- The relationship between sand and gravel sales and, new permissions over the last decade is now just below parity at a rate of 0.99 - not quite a 100% replenishment.

**Table 3: Quarries – sand and gravel sales and reserves - 2010-2019**

Thousand tonnes unless stated otherwise

| Year | Sand and Gravel[1] | | | | | |
|---|---|---|---|---|---|---|
| | Sales | % change on previous year | Permissions | Reserves | London Plan Requirement | Land-bank (Years) |
| **2010** | 679 | +18 | 0 | 1,380 | 700 | 2 |
| **2011** | 658 | -3 | 0 | 1,120 | 700 | 2 |
| **2012** | 320 | -51 | 0 | 1,180 | 700 | 2 |
| **2013** | 379 | +18 | 0 | 1,376 | 700 | 2 |
| **2014** | 375 | -19 | 0 | 702 | 700 | 1 |
| **2015** | 302 | -2 | 1,100 | 1,406 | 700 | 2 |
| **2016** | 350 | +15 | 0 | 1,321 | 700 | 2 |
| **2017** | 262 | -25 | 1,350 | 2,212 | 700 | 3 |
| **2018** | 342 | +31 | 1,050 | 3,384 | 700 | 5 |
| **2019** | 340[2] | 0 | 459 | 3,503[4] | 700 | 5(9)[5] |
| **10-year Totals** | 4,007[3] | | 3,959[3] | | | |
| **10-year av.** | 401 | | | | | |
| **3-year av.** | 315 | | | | | |

**Source:** AM 2018 Report, MPA - Overview of construction etc – London 2020

**Notes:**
[1] Years 2010 – 2014 include a small amount <100,000 tonnes of soft sand
[2] Estimate based on assumption of the GB 5% between 2018-19 – see MPA report.
[3] Replenishment rate – Permissions/Sales (over 10 years) = 1.74
[4] Reserve estimated from 2018 sales minus estimate 2019 sales and the addition of new permissions. The reserve does not include the permission granted by Hounslow LB subject to legal agreement in 2019 – see Appendix B.
[5] Landbank based on London Plan requirement, 0.7mtpa, but if the Hounslow decision is factored it would be 9 years - see 4.7 above 4.32 below.

## Wharves

4.8 There are a number of active aggregates wharves on the Thames – see Appendix A. However three; Murphy's (Tarmac), No 4 Jetty (Dagenham) (Hanson) and Angerstein (Cemex), account for over the majority of estimated aggregate sales. The remainder support local distribution and some have a transhipment role, which together reduce lorry traffic on London's roads.

4.9 Table 4 comprises estimated information for 2019 informed by Crown Estate statistics on landings of sand and gravel and Port of London Authority (PLA) information. The main features of the information in the Table are:

- A total of almost 4.9mt of aggregates were estimated to have been sold at the London wharves, the lowest for several years, but about the same as that of the 10-year averages. It is noted the PLA figures are lower still. Overall, there is a decline in aggregates sales of 5% (PLA decline is 16%)
- Sales of quarried sand and gravel and imported crushed rock are relatively small.

**Table 4: Wharves – marine & quarried sand & gravel and imported crushed rock – 2010-18**

Thousand tonnes

| Year | Marine Sand & Gravel | | Quarried Sand & Gravel | | Crushed Rock Imports | | All Aggregates | |
|---|---|---|---|---|---|---|---|---|
| | Sales | % | Sales | % | Sales | % | Sales | % Change on year before |
| **2010** | 3,007 | 85 | 135 | 4 | 379 | 11 | 3,521 | -12 |
| **2011** | 3,638 | 82 | 160 | 3 | 655 | 15 | 4,453 | +26 |
| **2012** | 3,775 | 83 | 144 | 3 | 629 | 14 | 4,548 | +2 |
| **2013** | 4,357 | 86 | 118 | 0 | 581 | 14 | 5,056 | +14 |
| **2014** | 4,596 (4,904) | 86 (87) | 107[2] (115) | 2 (2) | 666 (649) | 12 (11) | 5,369 (5,668) | +6 (+12) |
| **2015** | 4,959 (5,099) | 93 (88) | 0 (110) | 0 (2) | 381 (589) | 7 (10) | 5,340 (5,798) | -1 (+2) |
| **2016** | 5394 (5,614) | 95 (86) | 0 (180) | 0 (2) | 308 (760) | 5 (12) | 5,702 (6,554) | +7 (+15) |
| **2017** | 5,023 (5,221) | 98 (87) | 0 (122) | 0 (2) | 123 (672) | 2 (11) | 5,146 (6,016) | -10 (-8) |
| **2018** | 4,675 (5,494)[3] | 91 (93) | 0 (0) | 0 (0) | 477 (369) | 9 (7) | 5,153 (5,863) | 0 (-3) |
| **2019** | 4,440[5] (4,255) | 90 (94) | 0[4] (88) | 0 (2) | 480[6] 198 | 10 (4) | 4,920 (4,541) | -5 (-16) |
| **10-yr average** | 4,386 (5,137)[7] | | 66 (102)[7] | | 468 (540)[7] | | 4,921 (5,725)[7] | |
| **3-yr average** | 4,713 (4,990)) | | 0 (70) | | 323 (413) | | 5,073 (6,114) | |

**Source:** AM 2014-2017 reports; AM 2018 survey; Crown Estate: Marine Aggregates – The Crown Estate Licences – Summary of (County Landings) Statistics 2019 & 2020; .

**Notes:** [1] AM 2009 did not identify quarried sand and gravel so an estimated 4% proportion of marine sand & gravel estimate was applied.
[2] AM 2014 see [1] above except 2% estimated.
[3] Figures in parentheses provided by PLA: for 2019 the Crown Estate landings data is used.
[4] Historically very low – assumed zero: [7] 6-year average.

[5] Estimated from comparative 2018-2019 changes in Crown Estate landings data.
[6] Assumed nil growth 2018 - 2019

4.10 Regarding wharves' capacity the GLA undertook a review[8] of those designated in London for safeguarding. The review forecast freight traffic on the Thames and estimated wharves' capacity and concluded there is overall sufficient to meet demand until 2041. The review covered aggregates (construction materials) wharves and the picture however, for these facilities is somewhat different. Table 5 illustrates the relevant information, which suggests the capacity margin varies between different parts of the Thames and over the forecast period the overall capacity margin is finely balanced. Indeed by 2031 there is a shortfall, but it does improve by 2041. However, the latter figure is predicated on a fall in demand for construction materials. It also should be noted the 2021 forecast tonnage is 75% above the AM average (10 year) sales figures, which provides some flexibility. Moreover, there are some other wharves that might be readily adapted to handling construction materials. Nevertheless, as wharves are so important to London's aggregates supply, sales and capacities need to be closely monitored by the LAWP.

**Table 5: Wharves – demand/capacity for construction material - 2021-2041**

Million tonnes

| | | 2021 | 2031 | 2041 |
|---|---|---|---|---|
| **West** (West of Tower Bridge) | Demand | 0.4 | 0.4 | 0.3 |
| | Capacity | 1.0 | 1.0 | 1.0 |
| | Gap | 0.6 | 0.6 | 0.7 |
| **South East** (East of Tower Bridge/South of Thames) | Demand | 5.1 | 5.3 | 4.8 |
| | Capacity | 4.9 | 4.9 | 4.9 |
| | Gap | 0.2 | 0.4 | 0.1 |
| **North East** (East of Tower Bridge/North of Thames) | Demand | 3.1 | 3.2 | 2.9 |
| | Capacity | 2.8 | 2.8 | 2.8 |
| | Gap | 0.3 | 0.4 | 0.1 |
| **London** | Demand | **8.6** | **8.9** | **8.0** |
| | Capacity | **8.7** | **8.7** | **8.7** |
| | Gap | **0.1** | **0.2** | **0.7** |

Source: Implementation Report - Safeguarded Wharves Review 2018 – 2019 Final – December 2019

4.11 Further information on marine sand and gravel is provided by the Crown Estate's 'Marine Aggregates Capability and & Portfolio 2019[9]. This shows that for 2019, 4.9 Mt marine sand and gravel was landed[10] at the London wharves. This was

[8] https://www.london.gov.uk/sites/default/files/md2569_appendix_a_implementation_report_gla.pdf
[9] https://www.thecrownestate.co.uk/media/3502/2019-capability-and-portfolio-report.pdf
[10] Landings seldom equal sales, which in 2018 were 4.68Mt

mainly dredged from the East Coast (2.26Mt), East English Channel (1.6Mt) and Thames Estuary (0.74Mt). The Crown Estate reports indicate that the reserves in these 'regions' are 59.5 Mt and are sufficient, at 10-year average offtake, for 17 years. There are five dredging license applications pending that would increase the reserve by 2.85Mt.

4.12 To assist with the maintenance of marine sand and gravel supply Marine Plans for these areas are being prepared. The East Marine Plans covering the East Coast (North Sea) and the South Marine Plans (East English Channel) have been adopted by the Government. The South East Marine Plan (Thames Estuary) is under preparation and the LAWP responded to the consultation on the draft plan. All Marine Plans are adopting similar policies regarding aggregates, which are supportive of the requirements of the MASS.

## Rail Aggregate Depots

4.13 There were 16 active London aggregate rail depots in 2019. All handled imported rock and some also quarried and marine sand and gravel, which represented about an estimated 30% of total aggregates sales. Sales of all aggregates were estimated at 4.4 Mt, 11% below 2018, but less than 10% below the 10- and 3-year average sales.

**Table 6: Sales of crushed rock, quarried/marine sand & gravel at rail depots – 2010-2019**

Thousand tonnes

| Year | Crushed Rock | | Quarried Sand & Gravel | | Marine Dredged Sand & Gravel | | All aggregates[1] | |
|---|---|---|---|---|---|---|---|---|
| | Sales | % | Sales | % | Sales | % | Sales | % Change on year before |
| **2010** | 2,608 | 71 | 147 | 4 | 938 | 25 | 3,693 | +5 |
| **2011** | 3,580 | 72 | 117 | 3 | 1,258 | 25 | 4,955 | +34 |
| **2012** | 2,777 | 71 | 115 | 3 | 1,021 | 26 | 3,913 | -21 |
| **2013** | 3,100 | 70 | 122 | 3 | 1,199 | 27 | 4,421 | +13 |
| **2014** | 2,464 | 67 | 127 | 3 | 1,111 | 30 | 3,702 | -16 |
| **2015** | 2,747 | 63 | 96 | 2 | 1,496 | 34 | 4,339 | +17 |
| **2016** | 3,953 | 71 | 50 | 1 | 1,564 | 28 | 5,567 | +28 |
| **2017** | 3,668 | 69 | 104 | 2 | 1,561 | 29 | 5,333 | -4 |
| **2018** | 3,024 | 69 | 817 | 18 | 574 | 13 | 4,414 | -17 |
| **2019** | 3,030[2] | 70 | 1,310[1] | | | 30 | 4,340 | -11 |
| **10-yr. average** | 3,095 | | | 1373 | | | 4,468 | |
| **3-yr. average** | 3,241 | | | 1,212 | | | 4,695 | |

**Source:** AM 2009-2017; AM 2018 survey

**Notes:** [1] Sand and gravel estimates combined

[2] Based on available comparative sales information for AM 2018 and 'interim' AM 2019

4.14 The most important sources of crushed rock sold at the depots are Leicestershire and Somerset. The LAWP has considered the Local Aggregate Assessments of both these mineral planning authorities and is satisfied the supply from these areas can be sustained until 2030. There are concerns about supply in the longer term from Leicestershire.

4.15 An estimated 46% of aggregates sales in London are through the rail depots their capacity is significant to aggregates supply. There are no current estimates of rail depot capacity, but the highest sales in the last decade are about 6Mt or 30% above the higher of the 3/10-year average sales of 4.69 Mt. This provides a headroom over a million tonnes. The Cricklewood Railway Yard permission in 2018 expands rail depot capacity by 1.0 Mt.

## Recycled and secondary aggregate facilities

4.16 It is estimated there over 50 'fixed' sites[11] - see Appendix 1 - that handle construction, demolition, and excavation (CDE) waste. London's recycled aggregates production is estimated from data collected by the Environment Agency's Waste Date Interrogator (WDI) and illustrated in Table 7 below.

**Table 7: Processing of waste for recycled aggregates at CDE[1] waste facilities – 2015-2018**

Thousand tonnes

| | 2015 | 2016 | 2017 | 2018 | 2019 | Estimated 3-yr average (2017-2019) |
|---|---|---|---|---|---|---|
| **CDE[1] Waste Received for Treatment** | 3,569 | 4,142 | 4,022 | 4,283 | 4,013 | 4,106 |
| **Recycled Aggregates (lower estimate)[2]** | 1,784 | 2,071 | 2,011 | 2,141 | 2,006 | 2,053 |
| **Recycled Aggregates (upper Estimate)** | 2,676 | 3,106 | 3,017 | 3,212 | 3,010 | 3,080 |

**Source:** Environment Agency Waste Data Interrogator 2015 -2019

**Notes:** [1] Construction, Demolition and Excavation

[2] Lower and Upper bands for estimated tonnage are 50% and 75% respectively of all relevant CD&E waste treated at CDE waste recycling sites in London

[11] Site registered under the Environment Agency's publicly accessible Waste Data Interrogator (WDI) as handling construction etc wastes - temporary sites associated with the life of a construction projects are excluded. The sites are listed in Appendix 1

4.17 Recycling or recovery rate of CDE wastes vary and depend on the type of material processed and the capability of the facility. Those that have sorting, handling, screening, crushing, and washing plant can process wastes with a high proportion of hard material that readily produces clean aggregates that meet appropriate specifications. Evidence from industry indicate such sites can achieve a 75% or higher recovery rate.[12] On the other hand sites, some sites have lower recycling rates and produce less recycled aggregate. Accordingly, an upper and lower 'rates' are employed in Table 7 that estimates between 2 to 3Mts of recycled aggregate were produced in London during 2019.

4.18 There are four facilities producing secondary aggregates. One processes a small amount of spent railway ballast while the others process Incinerator Bottom Ash (IBA). Owing to data confidentiality these figures cannot be disclosed.

4.19 The Mineral Products Association (MPA) estimate[13] that in the UK overall, about 30% of aggregate is supplied from recycled or secondary sources. The MPA suggest that as this level of supply has been maintained for several years it might represent a maximum capacity for recycled aggregate. If this factor is applied to London's primary aggregates sales about 4Mt of recycled and secondary aggregate would have been produced in 2019.

4.20 Owing to the limited information it is not possible to estimate capacity of recycled and secondary aggregates facilities. Generally, Environmental Permits include limits that are much more than the through-put of the sites. It is therefore concluded there no major capacity issues for the facilities.

## Environment

4.21 All active and inactive sand and gravel quarries are within the Metropolitan Green Belt. There is not a presumption against the permitting of quarries as 'inappropriate development' in the Green Belt, but this is not always the case for related development such as processing plant. On the other hand, other national environmental designations such as SSSIs are not affected by quarries and aggregates facilities in London.

4.22 A more significant environmental impact of aggregates in London is that of impact on amenity, particularly regarding noise, air quality, visual disturbance, working hours and traffic. Owing to the density of built development and development pressures in London many aggregates facilities are sited close, or become so, to sensitive land uses. This creates land use conflicts, particularly around operational wharves. This gives rise to challenging issues for the planning process. The London Plan provides guidance to developers to ameliorate problems and there

[12] Mineral Products Association 'From Waste to Resources 2019'
[13] Mineral Products Association 'Economic & Market Briefing 2018'

are good examples of good practice, particularly in relation to noise on building facades. Similar issues apply to rail depots and recycling facilities. Although good practice is not always followed it should be noted these sites have an important role in removing a large number of heavy goods vehicles from local London's roads

4.23 All the Boroughs that that 'host' minerals infrastructure should have appropriate safeguarding policies in their local plans, which should be monitored for their effectiveness. It is noted that safeguarding policy has been supported by the Secretary of State. A scheme for the redevelopment of land on the rear part of Peruvian Wharf, Newham for 950 flats behind the proposed aggregate facilities was dismissed early in 2018

## Development Plans and Management

4.24 A schedule of progress on local plans in London, including The London Plan is set out in Appendix C. The four boroughs identified in the London Plan required to make sand and gravel provision Havering, Hounslow, Hillingdon, and Redbridge have adopted mineral planning policies

4.25 Redbridge LB has an adopted minerals local plan which has a 'preferred areas' comprising 1.22Mt of sand and gravel resource. This would meet the Borough's apportionment for the next ten years. However, permission for extraction was granted in 2018. On the other hand, the mineral plan also identifies further areas of search and the borough's LAA 2015 confirms the objective of meeting the London Plan's apportionment to 2031.

4.26 The London Borough of Hillingdon adopted its Local Plan: Part 2 in January 2020, which re-categorised safeguarded sites identified in the Local Plan Part 1 (2012) to reflect the PPG for minerals. It also adopted a new site, referred to as the Bedfont Court Estate, as an 'Area of Search'. In total, 106 ha of land is designated as either a Specific Site, Preferred Area or Area of Search based on the knowledge of mineral resources existing and the likelihood of extraction being acceptable in planning terms. It is estimated that these sites have a remaining maximum capacity of 4.15 Mt. A small portion, 0.45 Mt has permission which leaves an outstanding Allocation of 3.7 Mt outstanding. There is also uncertainty as to whether planning applications would be approved on the remaining sites and the extent to which constraints on the site would limit the full extent of this coming forward.

4.27 In the absence of being able to meet its London Plan landbank apportionment through permitted sites, Hillingdon considers that the allocation of sites is the most appropriate response to managing its land-won supply. It also safeguards sites for aggregate recycling and rail depots.

4.28 Hounslow has allocated in its Borough Plan one ‘preferred area’ (Rectory Farm – see below) estimated at 3.0Mt of sand and gravel and identified further areas that are currently safeguarded. Planning permission on the preferred area was granted permission in 2019, pending a legal agreement – see Appendix B.

4.29 Havering submitted in March 2018 a local plan for examination that comprises mineral polices. Adoption is still outstanding. The Plan identifies land to the south and north of the Borough that merit safeguarding for future mineral supply. No preferred areas are identified but the plan does commit to maintaining a 7-year land bank to meet London Plan requirements.

4.30 Planning decisions are illustrated in Appendix C.

- Prior extraction at Rectory Farm, Hounslow – permitted subject to legal agreement, 29 March 2019. NB As the application is technically outstanding – see 4.28 above - it is not treated as part of the reserve. However, once permission is issued the landbank would be 9 years.
- Extraction at Harmondsworth, 10 October 2019 Hillingdon for almost 0.5 Mt of sharp sand and gravel.

## 5 London Local Aggregates Assessments (LAAs)

5.1 There are not any up-to-date London LAAs. Havering, Redbridge, and Hillingdon have prepared LAAs in the past and the GLA prepared a London wide LAA based on AM 2017 information. However, the estimated AM information discussed above does provide the basis of a ‘preliminary’ London wide aggregates assessment – see Table 8 below – that brings together demand and capacities of aggregates facilities.

5.2 The critical element of an LAA is the estimation of annual demand or the ‘LAA Rates’ to estimate demand over a Plan period i.e.to 2041. Past Annual Reports have used the London Plan requirement of 0.7Mt as a LAA Rate. This is significantly higher than current sales and 10/3 sales averages and is likely to accommodate any likely foreseeable growth. Therefore, this has been adopted for the London LAA Rate for land won or quarried aggregates. For wharves’ sales the ‘demand’ statistics in the Safeguarded Wharves Review is considered suitable substitute for LAA Rates. For rail depot sales a 25% growth factor has been applied to 3-year sales averages.

## Table 8: London Aggregates Summary Assessment – 2019

Thousand tonnes unless otherwise specified

| Quarries & Aggregates Facilities[1] | Sales 2018 | Av. sales (10 years) | Av. sales (3 years) | LAA Rates (Demand) | Reserve or *Capacity* | Landbank (years) *Capacity Margin* |
|---|---|---|---|---|---|---|
| **Quarries (sand and gravel)** | 340 | 401 | 315 | 700 | 3,503 | 5 (9)[2] |
| **Comment** | The land bank provides for 5-year landbank which only covers less than half of the London Plan period to 2041. However, the LAA Rates is well above recent sales averages. There is also 3.7Mt of outstanding allocations for mineral extraction, which would increase the landbank above the NPPF requirement of 7 years. | | | | | |
| **Wharves (all aggregates)** | 4,440 | 4,386 | 4,713 | *8,000* | *8,700* | *+700* |
| **Comment** | The data includes demand and capacity from the Safeguarded Wharves Review - see Table 5 above. A positive capacity by 2041 although less so in the meantime. However, demand may be inflated. There may be potential for converting non construction materials (aggregates) wharves | | | | | |
| **Rail Depots (all aggregates)** | 4,340 | 4,468 | 4,695 | 5,900 | *6,000* | *+100* |
| **Comment** | LAA Rate based on 3-year average sales expanded by 25% to allow for growth. Capacity reflects that of the highest sales in last decade and provides an estimated surplus of 0.1Mtpa, which is limited. There is a further 1 Mtpa capacity in a recent permission. | | | | | |
| **CDE facilities (recycled aggregates)** | 2.006 or 3,080 | | 2,053 or 3,080 | 3,010 | | |
| **Comment** | No capacity data, but the view is that there are no significant issues. | | | | | |
| **General Comment** | London is technically not meeting its aggregates requirements - as explained above – in as such the landbank is below NPPF requirements. However, this is very much a small part of the supply to the Capital as external sources dominate the situation. However, there are questions regarding future capacity of wharves and rail depots that need to be continually monitored. There is some flexibility brought by an outstanding planning application, local plan allocations, and the new rail depot permission. | | | | | |
| **Note** | [1] MPA's 'Overview of construction ..etc .. London' (Aug 2020) suggests a 2.1% growth 2019-23. Converted to a LAA Rate for the 2020-41 Plan period a factor of 1.25 is applied to the largest 2019 average sales. [2] See discussion above - | | | | | |

# 6 Conclusions

6.1 The LAWP met twice during 2019:

- Agreed to the 2018 Annual and submitted it to MHCLG.
- Engaged in the preparation of the new London Plan.
- Engaged with the London Boroughs over the safeguarding of aggregates facilities.
- Responded to the MMO consultation on the South East Marine Plan.
- Responded to the consultation on the Heathrow Expansion regarding aggregates supply and safeguarding.
- Responded to Leicestershire LAA expressing concern about long term supplies of crushed rock from rail linked quarries. MHCLG has been informed about this concern.
- Considered with ALBPO preparing a joint LAA for London.

6.2 In the absence of the publication of the national AM 2019 survey estimated aggregates sales and reserves information is reported.

- Noted is the sales and consumption information from the 2014 AM survey reported in previous Annual Reports. Sales of primary aggregate have been steady at between 4.5 to 5 Mt although locally quarried aggregates are about 3% and London's dependence on marine aggregates through its wharves and imported aggregates. Somerset and Leicestershire are important sources of crush rock delivered by rail.
- Locally quarried sand and gravel sales are about the same as 2018, and reserves have been maintained although once a current planning decision has been confirmed there would be a 9-year landbank.
- Estimated sales from the wharves are slightly reduced (5%) from 2018 and likewise sales from the rail depots.
- Spare capacity at the aggregates wharves is limited. The rail depots have more surplus capacity and additional infrastructure has been permitted.
- Estimated production of recycled is lower than 2018 but is about the 3-year average. It is considered there are no capacity issues.

6.3 Although there are no current LAAs the information in Table 8 provides outline information for a London wide assessment.

- London meets the NPPF requirements for a 7-year landbank with some margins and allocations for potential reserves.
- There are limited capacity margins for the aggregates wharves that need to be safeguarded and monitored.
- There is some surplus capacity for the rail depots.
- Recycled aggregates sales are significant, but there are no known capacity

6.4 During 2019 the LAWP has complied with PPG advice by monitoring aggregates supply and engaging with relevant bodies. Moreover, the LAWP concludes that although London has only a five-year land bank it continues to contribute to national and local aggregates requirements and once planning permission in Hounslow has been issued it would make a full contribution. The LAWP also notes that aggregates supply to London is heavily dependent on marine and imported aggregates and the supporting infrastructure capacity is an essential contribution to aggregates requirements. This stresses the need for this infrastructure capacity to be continually monitored and safeguarded.

## Appendix A: London quarries and aggregate facilities – 2019

| Type | Site | Operator | Eastings Northings |
|---|---|---|---|
| | | | *(Inactive sites in Italics)* |
| **Barking and Dagenham** | | | |
| Wharf | Dagenham Dock | Hanson Aggregates | 549100 181600 |
| Wharf | Dagenham Dock | Cemex | 548100 182100 |
| Rail Depot | Dagenham | Hanson Aggregates | 581100 149100 |
| Wharf | Eurovia (No1 Western Extension) | Eurovia Roadstone | 548800 181800 |
| Recycled and Secondary Aggregate | Manns Waste Management Ltd | Manns Waste Management Ltd | 549011 182001 |
| Recycled and Secondary Aggregate | Barking Riverside Recycling Park | Foundation Developments Ltd | 547162 180205 |
| Recycled and Secondary Aggregate | S U C Exc U K Ltd | S U C Exc U K Ltd | 548160 182738 |
| **Barnet** | | | |
| Recycled and Secondary Aggregate | Scratchwood Quarry | Quality Recycling Solutions | 519766 194617 |
| **Bexley** | | | |
| Wharf | Pioneer Wharf, Erith | Tarmac Ltd | 550800 179700 |
| Wharf | Erith Wharf | FM Conway | 550900 179100 |
| Recycled and Secondary Aggregate | Roll On Off Services Ltd | Roll On Off Services | 553849 177877 |
| Recycled and Secondary Aggregate | Metropolitan Waste Management Ltd | Metropolitan Waste Management Ltd | 552266 177704 |
| Recycled and Secondary Aggregate | Anchor Bay Wharf | Erith Remediation Technologies Ltd | 552777 177820 |
| Recycled and Secondary Aggregate | Anchor Bay, Commercial Haulage Waste Treatment Facility | Mr G. Dugdale, Mr M. Dugdale, Mr S. Dugdale | 552973 552973 |
| Recycled and Secondary Aggregate | Landau Way Transfer Station | J & H Haulage Ltd | 553586 178099 |
| Recycled and Secondary Aggregate | Burts Wharf Recycling Depot | Highway United Ltd | 550041 180494 |
| Recycled and Secondary Aggregate | Crayfords Materials Recycling Facility | Viridor Waste Management Ltd | 552824 175480 |
| **Brent** | | | |
| Rail Depot | Wembley | Aggregate Industries | 519100 184500 |
| Rail Depot | Park Royal | Tarmac Ltd | 519500 182600 |
| Rail Depot | Cricklewood Railway Yard | DB Cargo (UK) Ltd | 523344 , 186487 |
| Recycled and Secondary Aggregate | Seneca Environmental Solutions Ltd | Seneca Environmental Solutions Ltd | 520650 185611 |
| **Bromley** | | | |
| Soft Sand Quarry | Bourne Wood | Bournewood S&G Ltd | 550346 168205 |

| | | | |
|---|---|---|---|
| **Camden** | | | |
| Rail Depot | Kings Cross | Tarmac Ltd | 530000 183800 |
| Rail Depot | Kings Cross | Hanson Aggregates | 530000 183900 |
| **Croydon** | | | |
| Rail Depot/ Recycled and Secondary Aggregate | Purley | Day Aggregates | 531500 161500 |
| Recycled and Secondary Aggregate | Henry Woods Waste Management Ltd | Henry Woods Waste Management Ltd | 530819 165256 |
| Recycled and Secondary Aggregate | Able Waste Services Ltd | Able Waste Services Ltd | 531018 163511 |
| **Ealing** | | | |
| Rail Depot | Ealing | Aggregate Industries | 519700 181100 |
| Recycled and Secondary Aggregate | Stone Terminal | Aggregate Industries UK Ltd | 520329 181326 |
| Recycled and Secondary Aggregate | Camden Plant | Camden Plant Ltd | 535909 191660 |
| Recycled and Secondary Aggregate | Volker Highways Depot | Volker Highways Ltd | 536950 197623 |
| Recycled and Secondary Aggregate | London & Metropolitan Recycling Facility | London & Metropolitan Recycling Ltd | 536234 192583 |
| **Greenwich** | | | |
| Wharf | Murphy's Wharf, | Tarmac Ltd, | 540400 179000 |
| Wharf | Riverside Wharf | Tarmac Ltd | 579300 141300 |
| Wharf | Victoria Deep | Hanson Aggregates | 538900 179400 |
| Wharf | Angerstein Wharf | CEMEX | 540300 179100 |
| Note: The wharf is rail linked | | | |
| Wharf | Brewery Wharf | JJ Prior | 537800 177600 |
| Rail Depot/Recycled and Secondary Aggregate | Angerstein | Aggregate Industries | 540400 179000 |
| Recycled and Secondary Aggregate | Day Aggregates | Day Group Ltd | 540639 178938 |
| Recycled and Secondary Aggregate | Victoria Deep Water Terminal | H Sivyer (Transport Ltd) | 539025 179548 |
| **Haringey** | | | |
| Recycled and Secondary Aggregate | O'Donovan-Markfield Road | O'Donovan Waste Disposal Ltd | 534279 188866 |

| | | | |
|---|---|---|---|
| **Havering** | | | |
| *Sand and Gravel Quarry* | *Cockhide Farm* | *Ingrebourne Valley* | *556969 182931* |
| Sand and Gravel Quarry | East Hall Farm | Brett Aggregates Ltd | 554446 181556 |
| Sand and Gravel Quarry | Wennington Quarry | Ingrebourne Valley | 554401 181209 |
| Recycled and Secondary Aggregate | Rainham Recycling Facility | O'Keefe Utilities Ltd | 555103 182776 |
| Recycled and Secondary Aggregate | Rainham M R F | Veolia E S Cleanway (UK) Ltd | 552500 179100 |
| Recycled and Secondary Aggregate | Veolia Inert Soils Coldharbour Lane | Veolia E S Cleanaway (UK) Ltd | 551910 180230 |
| Recycled and Secondary Aggregate | Mardyke Farm | Ebbcliffe Ltd | 551000 183700 |
| Recycled and Secondary Aggregate | Frog Island WM Facility | Shanks Waste Management Ltd | 550880 181070 |
| **Hillingdon** | | | |
| *Sand and Gravel Quarry* | *Harmondsworth Quarry* | *Ingrebourne Valley* | *506100 178200* |
| Sand and Gravel Quarry | Sipson (including Wall Garden Farm) | Harleyford Aggregates Ltd | 507500 178400 |
| *Rail Depot* | *West Drayton* | *Hanson Aggregates* | *507800 179900* |
| Rail Depot | West Ruislip | Yeoman Aggregates | 508900 186500 |
| Rail Depot | Hayes | Tarmac Ltd | 510600 179500 |
| *Rail Depot* | *Victoria Road, South Ruislip* | *N/A* | 511791 185194 |
| *Rail Depot* | *Tavistock Road, West Drayton* | *N/A* | 505638 180160 |
| Recycled and Secondary Aggregate | Bulls Bridge Aggregate Recycling & Processing Plant | FM Conway | 510690 179263 |
| Recycled and Secondary Aggregate | Crows Nest Farm | Country Compost Ltd | 507412 187876 |
| Recycled and Secondary Aggregate | Holloway Lane Materials Recycling Facility | Iver Recycling (UK) Ltd | 506800 178080 |
| Recycled and Secondary Aggregate | Wallingford Road Recycling Facility | Johal Mya Waste Management Ltd | 504921 182772 |
| **Hounslow** | | | |
| *Sand and Gravel Quarry* | *Rectory Farm* | *n/a* | *n/a* |
| Rail Depot | Brentford | Day Aggregates | 516300 178200 |
| Recycled and Secondary Aggregate | Brentford Aggregate Materials Recycling Facility | Day Group Ltd | 516490 178152 |
| Recycled and Secondary Aggregate | Plot 39 Bedfont Trading Estate | Fowles Crushed Concrete Ltd | 509014 172887 |
| **Kingston Upon Thames** | | | |
| Rail Depot | Tolworth | Day Aggregates | 519800 165500 |
| **Lambeth** | | | |
| Recycled and Secondary Aggregate | Belinda Road Waste Transfer Facility | Powerday Plc | 531810 175697 |

| | | | |
|---|---|---|---|
| **Merton** | | | |
| Recycled and Secondary Aggregate | Weir Road Waste Transfer Station | Maguire Skips Ltd | 525783 172147 |
| Recycled and Secondary Aggregate | 77 Weir Road | N J B Recycling Ltd | 525883 172623 |
| Recycled and Secondary Aggregate | The Willows Materials Recycling Facility | Cappagh Public Works Ltd | 525900 171900 |
| Recycled and Secondary Aggregate | 777 Recycling Centre | 777 Demolition and Haulage Co Ltd | 529493 167083 |
| Recycled and Secondary Aggregate | George Killoughery Ltd | George Killoughery Ltd | 527586 167389 |
| Recycled and Secondary Aggregate | Waste Transfer and Recovery Facility | Reston Waste Management Ltd | 525881 171798 |
| **Newham** | | | |
| Wharf | Royal Victoria Dock Wharf | Tarmac Ltd | 542200 179800 |
| *Wharf* | *Peruvian Wharf* | *Brett* | *539885 180274* |
| Recycled and Secondary Aggregate | Regional Waste Recycling (Commercial) Ltd | Regional Waste Recycling (Commercial) Ltd | 537786 183392 |
| Recycled and Secondary Aggregate | Thames Wharf | Keltbray Environmental Ltd | 539791 180427 |
| Recycled and Secondary Aggregate | Bywaters Recycling and Recovery Centre | Bywaters (Leyton) Ltd | 538416 182253 |
| **Redbridge** | | | |
| *Sand and Gravel Quarry* | *Fairlop Quarry* | *Brett Aggregates Ltd* | *547000 190200* |
| **Southwark** | | | |
| Recycled and Secondary Aggregate | Westminster Waste Ltd | Westminster Waste Ltd | 534810 178050 |
| Recycled and Secondary Aggregate | Southwark Integrated Waste Management Facility | Veolia ES Southward Ltd | 534900 177400 |
| **Sutton** | | | |
| Recycled and Secondary Aggregate | Raven Recycling | Raven Waste Paper Company Ltd | 529986 166802 |
| **Tower Hamlets** | | | |
| Rail Depot | Bow | Aggregate Industries | 537500 183500 |
| Recycled and Secondary Aggregate | Mc Grath Bros | Mc Grath Bros (Waste control Ltd) | 536971 184310 |
| Recycled and Secondary Aggregate | D R Plant Solutions | D R Plant Solutions Ltd | 538297 181808 |
| **Wandsworth** | | | |
| *Wharf* | *Battersea Wharf (Cringle)* | *CEMEX* | *529200 177600* |
| Wharf | Pier Wharf | Hanson Aggregates | 526000 175400 |
| Rail Depot | Battersea | Day Aggregates | 528900 177300 |
| Rail Depot | Battersea | Tarmac Ltd | 529100 176700 |
| Recycled and Secondary Aggregate | Day Aggregates Stewarts Lane Depot | Day Group Ltd | 529044 176672 |

## Appendix B: Aggregates planning applications - 2019

| Site Name | Mineral | Location | Type of development/ mineral | Applicant | Reserves/ Capacity | Status (undetermined, withdrawn, refused, permitted) | Designations (AoNB, SSSI / NNR, SPA/ SAC | Green Belt |
|---|---|---|---|---|---|---|---|---|
| Hounslow Rectory Farm Cranford Lane (P/2016/5112) (00315/E/P19) | Sharp sand and gravel | Cranford Lane, Hounslow, TW5 9NE | Prior extraction of sharp and gravel for major logistics development | Chadbourne Estates | 3.0mt | Permitted 29 March 2019 Subject legal agreement. | | x |
| Victoria Deepwater Terminal | Marine sand and gravel/ crushed rock | Unit 2, Victoria Deep Water Terminal, Tunnel Avenue, Greenwich, London, SE10 0QE" | Extension to wharf | | Marine aggregate: 100,000pa Crushed Rock (Igneous) 260,000 pa | | | |
| Hillingdon Harmondsworth (73289/APP/2017/3976) | Sharp sand and gravel | Holloway Close, Harmondsworth, UB7 0AE | Phased mineral extraction, including ancillary activities, with restoration to agriculture | Ingrebourne Valley Ltd. | 0.459mt | Permitted 10 Oct 2019 | | x |

## Appendix C: Local plans aggregates policies - 2019

| MPA | Local Plan or SPD title | Public Participation (Reg 18) | Publish Draft (Reg 19) | Submission to Sec of State (Reg 22) | Estimated date for independent examination | Estimated date for Adoption |
|---|---|---|---|---|---|---|
| **London** | | | | | | |
| Greater London Authority | The London Plan | Early 2018 | n/a | Autumn 2018 | Jan – May 2019 | Late 2020 |
| **West London** | | | | | | |
| LB Hillingdon | Local Plan: Part 1 Strategic Policies<br><br>Unitary Development Plan- Saved Policies<br><br>Part 2 (LPP2): Development management policies, site allocations & policies map | October - December 2015 | October 2015 | May 2018 | August 2018 | Adopted Nov 2012<br><br>Adopted Sep 2007<br><br>16 January 2020 |
| LPP2 allocates 3 Preferred Areas and an Area of Search for 4.25mt of sand and gravel extraction. | | | | | | |
| LB Brent | Unitary Development Plan<br><br>Development Management Policies (Will take out the aggregate policy) | | | | | Adopted 2004<br><br>Winter 2016 |
| LB Ealing | Development Strategy 2026 (also known as the Core Strategy DPD)<br><br>Development Sites | | | | | Adopted April 2012<br><br>Adopted December 2013 |
| LB Hounslow | Hounslow Local Plan 2015-30 Volume 1<br><br>Hounslow Local Plan 2015-30 Volume 2 | | | | | Adopted 15th Sep 2015<br><br>Adopted 15th Sep 2015 |
| Hounslow LP allocates a site for 3.0mt of gravel extraction. | | | | | | |

| | | | | | | |
|---|---|---|---|---|---|---|
| LB Richmond upon Thames | Local Plan Review<br><br>Core Strategy<br><br>Development Management Plan | | | | | Aopted Spring 2018<br><br>Adopted April 2009<br><br>Adopted November 2011 |
| LB Hammersmith & Fulham | Core Strategy<br><br>Local Plan | | | | | Adopted October 2011<br><br>Summer 2016 |
| LB Camden | Local Plan<br><br>Development Policies | | | | | Summer 2016<br><br>Adopted 2010 |
| LB Wandsworth | Core Strategy<br><br>Local Plan Review (2012-2016) | | | | | Adopted 2010<br><br>March 2016 |
| LB Kingston Upon Thames | Core Strategy | | | | | Adopted April 2012 |
| LB Sutton | Core Strategy<br><br>Site Development Policies DPD | | | | | Adopted December 2009<br><br>Adopted March 2012 |
| **East London** | | | | | | |
| LB Enfield | Core Strategy 2010-2025<br><br>New Local Plan 2017-2032 | December 2015-February 2016 | | | | Adopted November 2010 |
| LB Waltham Forest | Core Strategy<br><br>Development Management Policies | | | | | Adopted March 2012<br><br>Adopted October 2013 |

| | | | | | | |
|---|---|---|---|---|---|---|
| LB Croydon | Local Plan - Strategic Policies CLP1<br><br>Local Plan - Strategic Policies CLP1.1 (Partial Review)<br><br>Development Plan Document CLP2 | November - December 2015<br><br>November - December 2015 | Summer 2016<br><br>Summer 2016 | Winter 2016/2017<br><br>Winter 2016/2017 | May 2017<br><br>May 2017 | Adopted April 2013<br><br>Winter 2017<br><br>Winter 2017 |
| LB Bromley | Local Plan<br><br>Unitary Development Plan | | | | | Summer 2016<br><br>Adopted 2006 |
| LB Bexley | Core Strategy<br><br>Detailed Policies & Sites Local Plan | | | | | Adopted Feb 2012<br><br>Early 2017 |
| LB Greenwich | Core Strategy with detailed Policies<br><br>Site Specific Allocations | | | | | Adopted July 2014<br><br>Autumn 2017 |
| LB Barking & Dagenham | Core Strategy<br><br>Local Plan | Autumn-Winter 2015 | Summer-Autumn 2016 | Winter 2016 | Winter -Spring 2017 | Adopted July 2010<br><br>Spring 2017 |
| LB Havering | Core Strategy<br><br>Local Plan | Includes mineral policies | | 27 March 2018 Revised Submission Jan 2019 | Consultation on Main Mods Autumn 2020 | Adopted July 2008<br><br>2021 |
| Havering Local Plan does not allocate any land for aggregates extraction but there is a commitment to meet the London Plan requirement | | | | | | |
| LB Redbridge | Mineral Local Plan<br><br>Local Plan Review (2015-2030) | | | | | Adopted September 2012<br><br>Adopted 15 March 2018 (No mineral polices – MLP still part of development plan |
| Redbridge Local Plan has no outstanding allocations but notes there is potential for further extraction. | | | | | | |
| London Legacy Development Corporation | Local Plan | | | | | Adopted July 2015 |