



**SURREY**  
COUNTY COUNCIL

# Surrey Local Aggregate Assessment 2023

**December 2024**



# Foreword

This Local Aggregate Assessment (LAA) assesses the demand for and supply of aggregates in Surrey for the reporting period of 1 January 2023 to 31 December 2023.

A copy of the LAA covering the period 1 January 2022 to 31 December 2022 is available [here](#).

Should you wish to obtain a copy of historic LAA documents, highlight any errors in this report, or suggest how future LAAs can be improved please contact the Minerals and Waste Policy Team at [mdf@surreycc.gov.uk](mailto:mdf@surreycc.gov.uk), or write to:

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# Summary dashboard

All units expressed in 'thousand tonnes' unless otherwise specified. Cells marked 'c' indicate confidential data.

Aggregate	Sales 2023	Average annual sales		Reserves at 31/12/23	Reserves trend		Annual Provision Rate (APR)	Landbank (years)	Planned allocations outstanding	Capacity at 31/12/23
		10-year	3-year		10-year	3-year				
Soft (building) sand (SS)	341	449 (decrease)	405 (decrease)	4,920	decrease	decrease	0.5	9.84	0	-
Sharp sand and gravel (SSG)	120	286 (decrease)	205 (decrease)	2,984*	increase	increase	0.3	9.95*	7,620	
Sand and gravel (S&G)	461	746 (decrease)	616 (decrease)	7,904*	decrease	increase	0.8	9.88*	7,620	
Crushed rock (CR)	0	0 (no change)	0 (no change)	0	No change	No change	0	0	0	
Marine dredged aggregates (MDA)	0	0 (no change)	0 (no change)	-	-	-	0	-	-	-
MDA landings	0	0 (no change)	0 (no change)	-	-	-	0	-	-	-
Imported S&G @ wharves	0	0 (no change)	0 (no change)	-	-	-	-	-	-	-
Imported CR @ wharves	0	0 (no change)	0 (no change)	-	-	-	-	-	-	-
Imported S&G @rail depots	c	117	177	-	-	-	-	-	-	-
Imported CR @ rail depots	c	216	259	-	-	-	-	-	-	-
Secondary aggregate	35	Insufficient data	Insufficient data	-	-	-	1.0	-	-	1,882
Recycled aggregate	766	853 (increase)	765 (decrease)	-	-	-		-	-	

\* Amended March 2025 to provide consistency with the British Geological Society (BGS) Aggregate Mineral Survey 2023.

**General Comments:**

The summary dashboard above reports figures in ‘thousand tonnes’ for consistency with other LAAs in the region. For the remainder of this document, sales figures are set out in million tonnes, rounded to two decimal places.

Despite falling inflation and a slight reduction in interest rates, economic uncertainty and low construction activity persists nationally which is reflected in decreasing sales of primary, recycled and secondary aggregates when compared to 2022.

The overall landbank for sand and gravel of 9.88\* years is above the National Planning Policy Framework 2024 (NPPF) requirements. Sharp sand and gravel reserves have been boosted by Watersplash Farm receiving consent (Preferred Area L of the Surrey Minerals Plan Primary Aggregates DPD 2011 (PADPD)) and look healthy after maintaining the Annual Provision Rate (APR) (in line with low recent sales). Reserves are expected to be replenished further once other sites allocated in the PADPD come forward. Although the landbank suggests healthy reserves of soft sand, supply is expected to become tighter towards the end of the plan period (2026). Work on the Minerals and Waste Local Plan (MWLP) started in 2020 and will identify further sites for both sharp sand and gravel and soft sand extraction in the period 2027 to 2042.

The potential capacity level for recycled/secondary aggregates exceeds current sales. However, as much of the capacity is provided by sites with temporary planning permission, there is some capacity loss expected in the coming years, which it is presumed will be replaced by further temporary or permanent facilities. Surrey has two rail aggregates depots at Woking and Salfords, although Salfords is currently inactive. There are no known issues with supply/capacity at rail depots.

**Comments on Soft Sand:**

Sales of soft sand in 2023 are down compared to 2022 figures and the 3-year sales average. This is likely due to economic factors and increasing material costs, leading to a decline in construction activity. The current supply situation is good although focused on the east of the county. Supply will inevitably become tighter towards the end of the plan period (2026). The previous year’s APR of 0.5 million tonnes per annum (mtpa) has been maintained to give a slight buffer should sales improve.

**Comments on Sharp Sand and Gravel:**

Sales of sharp sand and gravel in 2023 show a decrease compared to 2022 figures and both the 10-year and 3-year sales averages. This is also likely due to economic factors and the costs of materials remaining high, leading to a decline in construction activity. The landbank figure has been boosted by Preferred Area L of the PADPD receiving permission, and further sites are anticipated to come into operation before the end of 2026. The previous year’s APR has been maintained at 0.3 mtpa to mirror the reality that sales have been lower than this for several years and are consistently lower than soft sand sales.

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\* Amended March 2025 to provide consistency with the BGS Aggregate Mineral Survey 2023.



**Comments on All Sand and Gravel:**

Total sand and gravel sales for 2023 are down 19% relative to 2022 figures, and down 38% and 25% compared to the 10-year and 3-year sales averages respectively. Sharp sand and gravel sales are down 21% from 2022, and down significantly at 58% relative to the 10-year average and 41% compared to the 3-year average. The drop in sales relative to 2022, and more generally, is likely due to economic factors leading to a decline in construction activity. When considering the decline in sales of primary aggregate, and the apparent lack of construction activity, there appears to be no clear reason to raise APRs at this time.

However, it is acknowledged that with the change in the UK Government, the reinstatement of mandatory house building targets, impending material revisions to national planning policy, as well as a recent bank rate cut, construction activity may increase in the medium to long-term. As such, the APR will be monitored and amended should data indicate that there is a likelihood of increasing demand. In the meantime, an APR of 0.8 mtpa will be maintained. This comprises a rate of 0.5 mtpa for soft sand and 0.3 mtpa for sharp sand in line with the 10-year average of 0.76 mtpa for sand and gravel sales. This approach accords with [National Planning Practice Guidance for minerals](#) which advocates that demand forecasts should be based on the 10-year average and other relevant local information.

*General note: total sand and gravel figures include low-grade sand and gravel used for construction fill, though this material is not included in the individual figures for soft sand or sharp sand and gravel.*

**Comments on Crushed Rock:**

The only active site is Oxted Chalk Quarry. Data cannot be provided because of commercial confidentiality.

**Comments on Marine Dredged Aggregates:**

No direct imports to Surrey, indirect imports to Surrey via rail and road.

**Comments on Marine Dredged Aggregate Landings:**

No direct imports to Surrey, indirect imports to Surrey via rail and road.

**Comments on Imported Sand and Gravel at Rail Depots:**

Sales data cannot be provided due to commercial confidentiality. Surrey imports a mixture of land-won sharp sand and gravel and imported Marine Dredged Aggregate (MDA) by rail and road.

**Comments on Imported Crushed Rock at Rail Depots:**

Sales data cannot be provided due to commercial confidentiality. Surrey imports material by rail and road.

**Comments on Recycled and Secondary Aggregates:**

There is insufficient data to provide a 10-year average sales data for secondary aggregates and providing a 3-year sales average data may not provide an accurate representation based on available data.

Recycled aggregate sales for 2023 are down 22% compared to 2022 figures and are similarly lower than sales data for the years before the Covid-19 pandemic. Supply is from fixed sites. Sales are similarly down 10% relative to the 10-year average but are up 0.1% on the 3-year average. This may be due in large part to the decline in construction activity affecting the amount of feedstock for aggregate recycling.

Notwithstanding the above and having regard to the potential for construction activity to increase in the medium and long term, the 2023 APR of 1.0 mtpa for recycled and secondary aggregates will be carried forward into 2024.

# 1. Executive Summary

- Sales of sand and gravel at 0.46 million tonnes per annum (mtpa) in 2023 are below the 10-year sales average of 0.75 mtpa, and the 3-year sales average of 0.62 mtpa. The 10-year sales average has decreased slightly from 2022.
- The Surrey Minerals Plan Primary Aggregates Development Plan Document 2011 (PADPD) identifies preferred areas for extraction sufficient to enable production of sharp sand and gravel at an average rate of 0.9 mtpa, and soft sand at an average rate of 0.5 mtpa during the period 2009-2026. This provision is significantly higher than average sales over the last 10 years.
- Forecasts for housing construction indicate an increase in demand for aggregate in future years. However, continued economic uncertainty and stubborn costs of labour and building material is producing lower construction activity which casts doubt on this prospect in the short to medium term. The Mineral Planning Authority observed falling sales as forecasted in the LAA 2022.
- As a result, Annual Provision Rates (APR) of 0.3 mtpa for sharp sand and gravel and 0.5 mtpa for soft sand, as set out in LAA 2022, are maintained in this LAA for the purposes of assessing future supply. These figures mirror the 10-year average sales for each aggregate type.
- Based on the above APRs the overall landbank of 9.88\* years at the end of 2023 is balanced, with reserves of soft sand at 9.84 years and sharp sand and gravel at 9.95\* years. However, reserves of soft sand are still significantly higher at 4.92 million tonnes (mt), compared to 2.98 mt of sharp sand and gravel. As such, were demand for sharp sand and gravel to increase, the landbank could start to appear unbalanced.
- Sharp sand and gravel reserves are likely to be replenished in the short to medium term based on PADPD preferred areas which are yet to receive planning permission. However, in the longer term it may be difficult to maintain a 7-year landbank should demand increase.
- The permitted resource position for soft sand is more favourable, however no remaining sites are identified in the PADPD.
- The emerging MWLP will seek to identify suitable additional reserves for primary land-won aggregates, however there are several environmental and other constraints/challenges within Surrey to consider and overcome in this regard.

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\* Amended March 2025 to provide consistency with the BGS Aggregate Mineral Survey 2023.



- It is likely that in the longer-term, Surrey will become increasingly reliant on recycled and secondary aggregates, imports of marine aggregates from wharves on the Thames Estuary, and imports of land-won sharp sand and gravel and soft sand from other counties.
- Sales of recycled and secondary aggregates have increased significantly over the last 12 years. The Surrey Minerals Plan Core Strategy 2011 (SMCS) target is for at least 0.9 mtpa by 2026. Sales figures for 2020 and 2021 were below this figure because of the effects of the Covid-19 pandemic. Although sales figures rebounded in 2022, sales in 2023 fell back below the target rate. The MPA considers that a rate of 1.0 mtpa is a robust basis for assessing future supply capacity.
- Seven rail depots within and just outside of the county enable Surrey to import a plentiful supply of crushed rock and marine aggregates. This infrastructure will become increasingly important to the steady and adequate supply of aggregates in Surrey.
- It is therefore important to ensure the continued safeguarding of mineral infrastructure, including rail depot and recycling facilities, both inside and outside of Surrey.
- The review of Surrey's Minerals Development Framework commenced in 2020. The emerging Minerals and Waste Local Plan (MWLP) will need to address the potential for new aggregate extraction sites and adequate aggregate recycling capacity, to ensure Surrey maintains a steady and adequate supply of aggregate minerals.

## 2. Introduction

### Background information

1. A Local Aggregate Assessment (LAA) is an annual assessment of the demand for and supply of aggregates in a particular Mineral Planning Authority (MPA) area. This LAA for Surrey for the 2023 calendar year has been prepared by the MPA in accordance with national policy and guidance (National Planning Policy Framework 2024 (NPPF) paragraph 226 and the National Planning Practice Guidance (NPPG) planning for aggregate minerals) and adopted by the South East England Aggregates Working Party (SEEAWP).
2. When preparing an LAA, the MPA is required to set an Annual Provision Rate (APR) (sometimes referred to as an LAA Rate). The APR is a forecast of future aggregate demand and is determined based on relevant factors including 10-year average sales, sales trends and other relevant local information.
3. The MPA have worked closely with SEEAWP in preparing this LAA. The summary dashboard was modified in the 2022 LAA to provide consistency with the LAAs of other MPAs in the South East of England, and the approach for the 2023 LAA remains consistent. For the remainder of the LAA, all figures are set out in million tonnes, rounded to two decimal places for consistency with Surrey's previous LAAs and the figures set out in the Surrey Minerals Plan Core Strategy 2011 (SMCS) and the Surrey Minerals Plan Primary Aggregates DPD 2011 (PADPD).

### Aggregates in Surrey

4. Aggregate deposits in Surrey comprise sharp sand and gravel (concreting aggregates) and soft sand. Sharp sand and gravel is mainly found as flood plain and terrace deposits in the valleys of the main rivers, and is currently supplied from five mineral workings in Surrey ([see Annex 1](#)).
5. Soft sand is found in the Folkestone Formation which is exposed in a belt stretching across central Surrey from Limpsfield in the east to Farnham in the west. Soft sand is currently supplied from four mineral workings in Surrey ([see Annex 1](#)).

### Planning Constraints

6. Surrey comprises 11 districts and boroughs and is bounded by Kent to the east, West and East Sussex to the south, Hampshire to the west, Berkshire to the north-west, and Greater London to the north-east. It is largely a rural county but there are significant urban areas (where some 87% of its 1.2 million residents live) located in the north near the boundary with London and in large settlements such as Guildford, Camberley, Epsom, Redhill, Staines-upon-Thames and Woking.
7. Over 70% of Surrey benefits from one or more national or international landscape or nature conservation designations. The Surrey Hills National Landscape and a small area of the High Weald National Landscape cover approximately 26% of the county. For international nature conservation designations, there are 2 Ramsar Sites (wetlands of international importance), 4 Special Protection Areas (SPA), 3

Special Areas of Conservation (SAC), 65 Sites of Special Scientific Interest (SSSI), and 3 National Nature Reserves (NNR) partly or wholly within the county, with a further SPA and 8 SACs located within 10 kilometres of the county boundary; and more than 700 Sites of Nature Conservation Importance and Local Nature Reserves. In addition to this, a substantial part of the county's land area is covered by an Area of Great Landscape Value designation which is set in local plans prepared by district and borough councils.

8. Some 73% of the county is designated Metropolitan Green Belt. It is also the most wooded county in England with about 23% of it being covered by woodland of which about 119 square kilometres is irreplaceable Ancient Woodland.
9. About 2.5% of Surrey is covered by an archaeological designation; and it hosts almost 7,000 buildings of historic interest (including Grade I and Grade II\* listed buildings), over 250 conservation areas, 47 registered parks and gardens, and just under 200 Scheduled Monuments.

#### **a) Land-won sand and gravel**

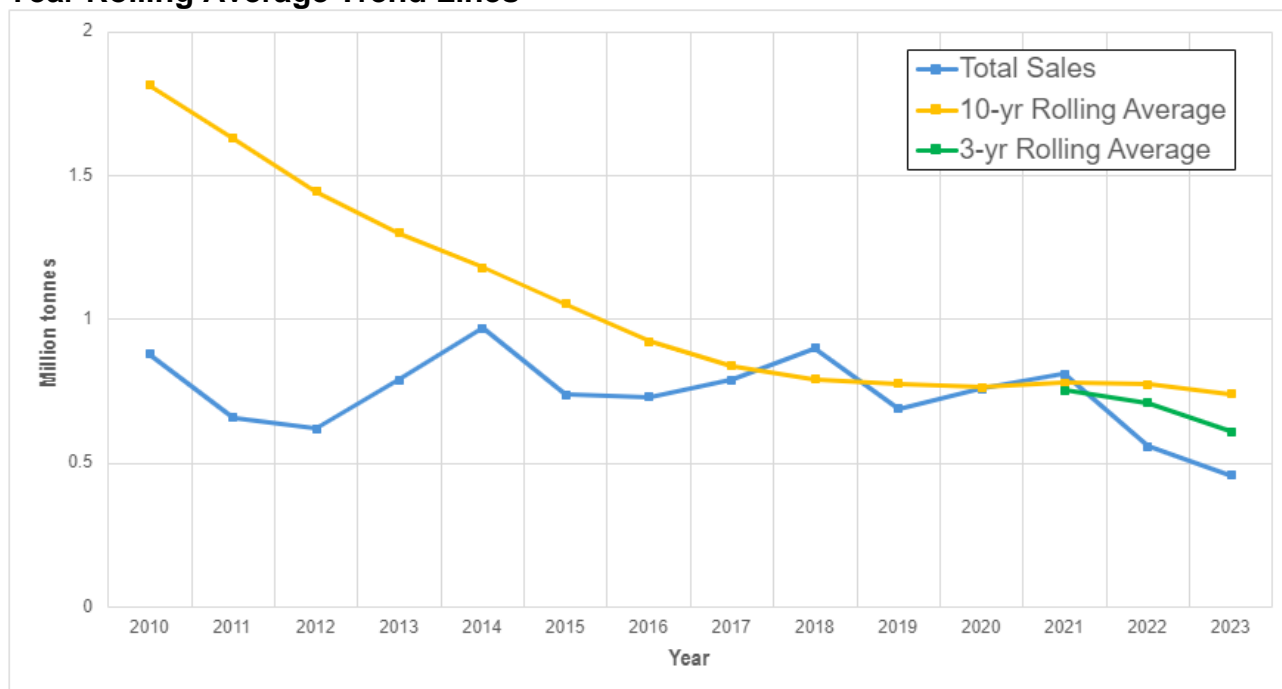
10. As a starting point, forecasting aggregate demand should be based on a rolling average of the past 10 years' sales data (NPPG, DCLG, Updated 06 March 2014, paragraph 062).

**Table 1: Sales of Land-won Primary Aggregates in Surrey (million tonnes) for last 10 years**

	2014	2015	2016	2017	2018	2019	2020	2021	2022	2023	10yr Av	3yr Av
<b>Soft sand</b>	0.57	0.50	0.41	0.39	0.44	0.49	0.47	0.47	0.41	0.34	<b>0.45</b>	<b>0.41</b>
<b>Sand &amp; Gravel</b>	0.41	0.25	0.32	0.41	0.47	0.20	0.20	0.35	0.15	0.12	<b>0.29</b>	<b>0.21</b>
<b>Total</b>	0.98	0.74	0.73	0.80	0.91	0.69	0.76	0.82	0.57	0.46	<b>0.75</b>	<b>0.62</b>

11. Between 2014 and 2023, total sales of land-won primary aggregates have been below the current 10-year average of 0.75 mt every year except for 2014, 2017, 2018 and 2021. This can be attributed in part to the completion of mineral extraction at several quarries, the impact of the Covid-19 pandemic and recent economic uncertainty.
12. The current 10-year average of past sales of 0.75 mt is well below the average minerals provision rate of 1.4 mtpa set by the PADPD. The 3-year average sales figure of 0.62mt has decreased relative to the 2022 3-year average figure of 0.71mt.

**Figure 1: Sales of Land-won Primary Aggregates in Surrey with 10-Year and 3-Year Rolling Average Trend Lines**



#### **b) Other relevant local information**

13. The [National Infrastructure Delivery Plan 2016 – 2021](#) set out the UK Government's infrastructure plans over the period to 2021. The plan is now out of date and no update has been provided by the Infrastructure and Projects Authority.
14. [National Policy Statements](#) set out the Government's objectives for the development of nationally significant infrastructure in a particular sector. Many of the existing statements are outdated, however there were consultations on revised statements relating to [Planning for new Energy Infrastructure](#) and [National Networks](#) in 2023, and it is likely that the new Labour Government will seek to make their own changes to these statements.
15. Short term major infrastructure projects will rely on existing sources of primary aggregate supply. More significant and longer-term infrastructure schemes are likely to rely on imports of crushed rock and marine sand and gravel landed at wharves on the Thames Estuary. For example, the Marine Management Organisation (MMO) have demonstrated that marine aggregate resources have supported a number of prestigious developments in London and the South East including Canary Wharf, the Channel Tunnel Rail Link, Heathrow Terminal 5, 2012 London Olympic infrastructure, and the regeneration of the Thames Gateway ([East Inshore and East Offshore Marine Plan, Areas Evidence and Issues Overview Report, 2012](#)). The increasing use of marine-won aggregates appears to reflect diminishing land won supplies in London and the South East.
16. The [2017 Surrey Infrastructure Study](#) was prepared on behalf of the Surrey local authorities to provide an up-to-date view of emerging development and infrastructure requirements to support growth across Surrey. This study identifies that:

- Surrey authorities are planning for growth over the 15-year period to 2031 delivering on average 4,357 dwellings per year. This compares with the historic 10-year average net completion rate of 2,791 dwellings.
  - 65,356 dwellings are expected between 2016 and 2031, including new settlements, with an associated population increase of 9%.
17. The study also sets out that delivering the necessary infrastructure to support growth from 2017 to 2031 is estimated to cost at least £5.5 billion and includes projects such as:
- Redevelopment of Junction 10 Wisley Interchange.
  - A3 and A320 corridor improvements.
  - 23 major transport schemes planned to tackle areas of significant congestion in town centres and to improve and modernise key road junctions.
  - New schools.
  - Major rail infrastructure improvements.
18. New housing may be considered a useful proxy for overall aggregate demand. Historic housing completions data for Surrey (2014/15 to 2023/24) gives a 10-year average of 2,818 dwellings completed per annum. Predicted housing trajectories (from allocations in local plans) for Surrey over the next ten years (until 2033/34) suggest an average of 4,431 dwellings completed per annum. Were this level of housing to materialise, it would represent a 57% uplift in completions when compared to the 10-year average. This suggests that there will be a significant increase in housing construction in Surrey.
19. However, it is unclear whether the level of housing detailed above will come forward. Data on housing projections utilised as part of the LAA 2022 indicated that there would be a significant uplift in housing construction in 2023, a 66% increase compared to 2022. What materialised was instead a 30% fall in housing construction from 2022. This represented a drop of 63% from the number of forecasted dwellings to the 2,150 completed dwellings ([Live Table on Housing 253](#)).
20. In addition, taking a sample of planning permissions from 2013-2023 in the South East of England, 43% fewer houses were built than benefited from planning permission over this period ([Live Table on Housing 217](#)). This serves to illustrate the disparity between housing projections and completions.
21. Consequently, it is reasonable to apply a percentage reduction to housing predicted to come forward in future years. Applying a reduction of 43% to the projected housing figures, in line with the planning permission build-out rate set out above, would largely fit with the observed fall in projected to actual completions for 2023/24. Doing so would result in a 10% reduction relative to the existing 10-year average for housing completions.
22. However, while the 57% uplift identified above seems high, a 10% reduction also seems excessively low. It is acknowledged that 2023/24 may not have been a

typical year in terms of house building due to high inflation and economic difficulties. Therefore, a middle way is identified by calculating the average of the two figures to provide for an uplift of 23%. While this is still relatively high, it takes account of the potential for housing construction activity to recover, while tempering the projected rise due to past evidence and continued economic uncertainty which is discussed further below.

23. Alongside housing, spending on roads is used as an additional tool to complement the calculation on overall aggregate demand. Comparing net spend on new road projects and maintenance over previous years with proposed spending in future years gives an indication of spending trajectory and whether there is likely to be a consequent increase in aggregate demand. Discussions with Surrey County Council colleagues suggest that around 75% of spending on roads is apportioned to maintenance schemes whilst the remaining 25% is attributed to new projects. Spending on new projects is not forecast to increase, but spending on maintenance is forecast to decrease by 14% between the 2023/24 and 2024/25 financial years. This amounts to a 10% decrease in road spending overall. It should be noted however that the projected decrease is likely due to national and local budgetary constraints owing to, in part, general economic pressures.
24. National aggregate sales have fallen year-on-year fall since the covid-19 pandemic. The Mineral Products Association's [11<sup>th</sup> Annual Survey Report](#) shows a decline of 5.35% for aggregate sales in 2023, with volumes at their lowest since 2013. Moreover, the Building Cost Information Service have forecasted an increase in building costs of 15% over the next five years, with elevated borrowing costs, skills shortages in the construction industry, and economic uncertainty all contributory factors ([Building Cost Information Service](#)).
25. More broadly, despite a brief recession in 2023, the UK economy is expected to grow by 1.0% by the end of 2024, rising to 2% in 2025 ([Office for Budget Responsibility](#)). However, medium to long-term growth is expected to remain largely subdued with 1.8% growth in 2026, then falling to 1.5% in the subsequent three years to 2029. After the first bank rate cut in four years confirmed in August 2024, the British Chamber of Commerce forecasted a further rate cut in Q4 but has not forecasted interest rates returning to the historically low levels seen before the Covid-19 pandemic.
26. However, government data showcases falling construction costs after a sustained period of elevated construction material price inflation ([Department for Business and Trade](#)). When combining the conservative economic growth forecasts and the potential for building costs to fall there is scope for a slight rebound in sales of aggregates in the short to medium term. This sentiment is shared by PWC, who forecast a 2.9% growth in the construction and housebuilding sector in 2025, driven in large part by renewed annual housing targets ([PWC](#)).
27. Despite a planned increase in housebuilding and infrastructure spending from the UK Government, general uncertainty in the economy persists which may undermine the potential for a significant rebound. The economic outlook is likely to influence factors such as the price of materials and labour, which may in turn adversely impact business investment and consumer spending. This may affect



the amount of housing that comes forward, as well as road improvement projects and the cost of existing projects and maintenance.

28. In calculating any potential increase in aggregate demand based on the factors highlighted above, it is important to consider the amount of aggregate likely to be used in housing and roads. According to the British Geological Society [Mineral Planning Factsheet: Construction Aggregates](#) (June 2019):

- 88% of total sand and gravel (including soft sand) sold may be used in the construction of homes.
- 37% of total sand and gravel (including soft sand) sold may be used in the construction and maintenance of roads.

29. Proposed increases in aggregate demand are calculated using the sale rates for sand and gravel (including soft sand) over the past 10 years taking account of other relevant factors. Accordingly, several distinct scenarios (based on the factors discussed above) are set out relating to future demand for sand and gravel (tonnes per annum):

- Assumption 1: Housing is projected to grow by 23% in Surrey.
- Assumption 2: Spending on roads is expected to decrease by 10% in Surrey.
- Assumption 3: Up to 88% of sand and gravel (including soft sand) may be used in the construction of homes.
- Assumption 4: Up to 37% of sand and gravel may be used on road maintenance/improvements.
- Assumption 5: Housing is projected to grow by 57% in Surrey.

30. Table 2 below sets out several Demand Forecast Scenarios (DFS) relating to Surrey's aggregate requirements, each applying different combinations of the assumptions set out above:

**Table 2: Demand Forecast Scenarios (DFS)**

	DFS 1	DFS 2	DFS 3	DFS 4	DFS 5
<b>Assumptions applied</b>	None	1,2,3,4	1,2	2,3,4,5	2,5
<b>10-year average</b>	746,000	746,000	746,000	746,000	746,000
<b>Additional demand for housing</b>	0	150,990	171,580	374,194	425,220
<b>Additional demand for roads</b>	0	-28,982	-74,600	-28,982	-74,600
<b>Forecasted Annual Requirement</b>	746,000	868,008	842,980	1,091,212	1,096,620

31. DFS 1 is simply the 10-year average for past aggregate sales. DFS 2 and 3 use the more conservative housing uplift figure of 23%, while DFS 4 and 5 use the unmitigated housing uplift figure of 57%.
32. For DFS 2 and 4, the additional demand for housing and roads were calculated by working out 88% (for homes) and 37% (for roads) of the 10-year average sales figure of 746,000. The housing and roads spending uplifts were then applied to these figures. Finally, the uplifts were added back to the 10-year average to provide a total annual aggregate requirement.
33. For DFS 3 and 5, where the 88% and 37% calculations were not applied, the percentage uplifts were calculated as percentages of the 10-year average sales figure, and subsequently added to the 10-year average.
34. Although the scenarios set out above indicate an increase in demand for aggregates in Surrey, it is not clear whether this is likely given the wider economic challenges facing the UK, and particularly the construction industry. With reference to the LAA 2022, a significant increase in housing construction and road spending was forecast, indicating a rise in aggregate demand. However, this did not materialise, and 2023 sales figures fell significantly from the previous year. As such, given the combination of persistent economic uncertainty and the recent proposed planning reforms to increase housebuilding, it is reasonable to maintain the APR at 0.8 mt for 2023, after which the rate will be reviewed and increased should aggregate demand rise.
35. Hence the situation will need to be monitored, but there is no evidence at present to suggest a material and sustained increase in aggregate demand from land won sources over and above the 10-year average sales level.

### **Conclusion and APR:**

36. The current 10-year average of past sales (0.75 mtpa) covers periods of both economic growth and stagnation, and includes years where sales were affected by the Covid-19 pandemic. It is expected that 2024 sales will remain low as in 2023, due to continued economic uncertainty. However, aside from this the 10-year average is expected to be relatively consistent in the short to medium-term. As the economy begins to recover, some growth in demand for primary aggregates is anticipated (particularly in respect of increased construction activity, road building and maintenance programmes and reinstated mandatory housing targets), but this is not expected to give rise to average sales approaching the PADPD provision rate of 1.4 mtpa. Indeed, it appears at present that sales will likely be closer to the current 10-year average of 0.75 mtpa.
37. In meeting demand, it is essential to make best use of resources, to husband land-won mineral resources and wherever possible utilise alternative sources of aggregate. This accords with the NPPF, which explains that “since minerals are a finite natural resource, and can only be worked where they are found, best use needs to be made of them to secure their long-term conservation” and advocates, so far as practicable, that the MPA “take account of the contribution that substitute or secondary and recycled materials and minerals waste would make to the supply

of materials, before considering extraction of primary materials” (NPPF 2024 paragraphs 222 and 223b).

38. Considering the potential growth factors, uncertainties, and the national policy objective to make best use of minerals, an APR of 0.8 mtpa (0.3 mtpa for sharp sand and gravel and 0.5 mtpa for soft sand) is used to assess future supply options for the purposes of this LAA.

### **c) Recycled and secondary aggregates**

39. The SMCS set an ambitious target to supply at least 0.9 mtpa of recycled and secondary aggregates by 2026. To help achieve this target, the MPA adopted the Aggregates Recycling Joint DPD in 2013 which identifies 11 sites for aggregate recycling.
40. The 0.9 mtpa target reflects the large quantity of construction, demolition and excavation waste managed in Surrey, a substantial proportion of which is imported from London and surrounding counties.
41. Significant progress has been made with production of recycled aggregates in Surrey from 2007 to 2023 with sales peaking at 1.23 mt in 2019. Sales declined in 2020 and 2021, although this can be attributed to the effects of the Covid-19 pandemic.
42. The 2023 sales figure of 0.77 mt is down compared to sales in 2022 and falls below the SMCS 0.9 mtpa target. Reduced sales can be attributed to lower supply of feedstock after a slowdown in construction activity. Annual survey data only captures production from fixed sites, so actual production figures will be higher given that some recycled aggregate will be produced using mobile plant on development sites.

**Table 3: Recycled Aggregate Sales in Surrey 2014-2023 (mt)**

<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>10yr Av</b>	<b>3yr Av</b>
0.64	0.84	0.76	1.12	1.07	1.23	0.59	0.54	0.99	0.77	0.85	0.77

### **Conclusion and APR:**

43. The 10-year sales average for recycled aggregate is 0.85 mtpa. This masks steady growth in recycling rates over the 10-year period, with a drop-off during the years affected by the Covid-19 pandemic, a strong recovery in 2022 and a subsequent fall in 2023. Looking forward, and acknowledging the increasing reliance on this supply option, a rate of 1.0 mtpa is considered a reasonable basis for assessing the supply of recycled aggregate capacity. This exceeds the longer-term target of 0.9 mtpa in the SMCS.

### **d) Imports and exports**

#### **Land-won sand and gravel:**

44. The 2019 Aggregate Minerals Survey indicates that Surrey imported 370,000 tonnes of land-won sand and gravel, primarily from the South Downs National Park Authority area and to a lesser extent from Hampshire, Buckinghamshire, Kent and West Sussex. Imports into Surrey are all by rail or road, either directly from quarries or from rail depots primarily located just outside the county boundary, as well as the Woking rail depot within Surrey.
45. The demand for land-won sand and gravel imports to Surrey is not anticipated to increase in the short to medium-term. This is due to: (i) the increase in recorded sales of recycled aggregates; (ii) three planning applications (Preferred Area D: Milton Park Farm ref. RU09/0299, Preferred Area E: Whitehall Farm ref. RU.21/0597, and Preferred Area H: King George VI reservoir ref. SP21/01831/SCC) awaiting determination for the combined extraction of 6.54 mt of sharp sand and gravel on preferred areas identified in the PADPD; and (iii) the potential for the remaining preferred areas (A and C) to come forward.
46. However, in the next 10-20 years Surrey is likely to have run out of exploitable resources of sharp sand and gravel. A significant increase in the demand for imports can therefore be anticipated in the long-term. For sand and gravel transported by road, the catchment for Surrey may widen given that average haulage distances for aggregates have continued to grow, reaching 28 miles in 2020 ([Mineral Products Association Sustainable Development Report 2022](#)).

#### **Imports of marine aggregates:**

47. Marine aggregates make an important contribution towards the supply of construction aggregates across the UK, particularly in South East England, London and South Wales. Between 15 and 20 mt are extracted from the seabed around Britain annually, and the material currently meets more than 20% of the sand and gravel demand in England and Wales ([Marine Aggregates Capability & Portfolio](#), The Crown Estate, 2021).
48. The [Aggregate Minerals Survey 2019](#) reports that 324,000 tonnes of marine-dredged sand and gravel was imported into Surrey, the majority of which originated from Greater London (east of). LAAs prepared by other South East MPAs suggest that the amount of provision being proposed for land-won sand and gravel is significantly lower than that previously apportioned in the [Secretary of State's Proposed Changes to Policy M3 of the South East Plan](#) (March 2010). This may mean that there will be increasing demand for alternative sources of supply, including marine sourced and recycled and secondary aggregates.

#### **Imports of Crushed rock:**

49. Surrey imported at least 450,000 tonnes of crushed rock in 2019, of which over 80% was imported from Somerset with the remainder primarily sourced from Leicestershire and Derbyshire (8%) and Glensanda Quarry, Scotland via the Isle of Grain (12%). A significant amount of crushed rock is imported directly into Surrey via the rail depot in Woking. The remainder is likely to have been transported to rail depots just beyond the county boundary and then transported the short distance into Surrey by road.

### 3. Future supply options

#### a) Land-won sand and gravel

**Table 4: Permitted Reserves of Land-won Sand and Gravel in Surrey 2014-2023 (million tonnes)**

Year	2014	2015	2016	2017	2018	2019	2020	2021	2022	2023
<b>Sharp Sand and Gravel</b>	1.49	3.43	3.29	3.20	2.73	1.99	1.93	1.90	3.02	<b>2.98</b>
<b>Soft Sand</b>	8.53	8.17	7.85	7.71	7.18	5.86	5.97	5.53	5.11	<b>4.92</b>
<b>Total Reserves</b>	10.02	11.60	11.14	10.91	9.91	7.85	7.90	7.47	8.14	<b>7.90</b>

50. Based on the APR of 0.8 mtpa for all sand and gravel, a permitted reserve of at least 5.6 mt is required to maintain a landbank of at least 7-years. The remaining permitted reserves of 7.90 mt at the end of 2023 are sufficient to maintain provision for over 7-years at the APR of 0.8 mtpa.

51. The PADPD identifies 11 preferred areas estimated to supply 15.42 mt over the plan-period 2009 to 2026. At the end of December 2023, the extraction of some 7.62 mt of reserve identified in the PADPD had yet to be granted planning permission, which indicates there is potential for a 7-year landbank to be maintained beyond 2026.

**Table 5: New Sand and Gravel Reserves (mt) needed to Maintain Future Landbank Requirements Based on new APR of 0.8 mtpa**

Year	2024	2026	2028	2030
<b>Reserves at start of year</b>	7.90	6.30	4.70	3.10
<b>Additional reserves to maintain 7-year landbank of 5.6 mt</b>	-	-	0.90	2.50

52. The PADPD recognises the need to consider separate markets for concreting aggregate and soft sand. This stems from the fact that both demand and supply are distinct in terms of end use and geography of extraction. These distinct mineral types are analysed in more detail below.

#### **Sharp Sand and Gravel:**

53. Based on the APR of 0.3 mtpa, reserves are sufficient to maintain provision for 9.95\* years.

\* Amended March 2025 to provide consistency with the BGS Aggregate Mineral Survey 2023.

54. The PADPD identifies 10 preferred areas for the extraction of sharp sand and gravel which contain an estimated combined resource of 12.72 mt. There has been strong interest from industry in bringing forward some of these preferred areas, five of which have been granted planning permission in the period since the adoption of the SMCS:

- Preferred Area F: Home Farm Quarry Extension, Shepperton (0.5 mt).
- Preferred Area G: Homers Farm, Bedfont (0.75 mt).
- Preferred Area J: Manor Farm, Laleham (1.5 mt).
- Preferred Area K: Queen Mary Quarry, Ashford (1.25 mt).
- Preferred Area L, Watersplash Farm, Halliford (1.16 mt).

55. A planning application (ref. RU09/0299) has been submitted to the MPA for the extraction of 2.14 mt of concreting aggregates at Milton Park Farm (Preferred Area D).

56. Another planning application (ref. RU.21/0597) has been submitted for the extraction of up to 1.0 mt of sand and gravel at Whitehall Farm (Preferred Area E).

57. A further planning application (ref. SP21/01831/SCC) has also been submitted for the extraction of approximately 3.4 mt of sand and gravel at King George VI reservoir (Preferred Area H) following a public exhibition during summer 2019.

**Table 6: New Sharp Sand and Gravel Reserves Needed to Maintain Future Landbank Requirements Based on APR of 0.3mtpa**

Year	2024	2026	2028	2030
<b>Reserves at start of year</b>	2.98	2.38	1.78	1.18
<b>Additional reserves to maintain 7-year landbank of 2 mt</b>	-	-	0.22	0.82

#### **Soft sand:**

58. The permitted resource position for soft sand is more favourable than for sharp sand and gravel, although most of this reserve is in the east of the county and coincides with the Surrey Hills National Landscape.

59. In August 2014, planning permission (ref. TA/2013/1799) was granted for the extraction of 4.1 mt of soft sand at Mercers South Quarry. In 2018 planning permission (ref. TA/2017/2346) was granted for an extension to the permitted extraction area at Mercers South Quarry for a further 0.25 mt of soft sand. This resulted in a significant increase in the soft sand landbank. This is the only preferred area (area P) for soft sand extraction identified in the PADPD.

60. Moreover, consent (ref. WA/2014/0005) for an extension of time was granted in October 2015 at Alton Road, Farnham. This will enable the extraction of 0.77 mt of soft sand in the west of the county over a period of approximately 9.84 years.



61. Using the APR of 0.5 mtpa, soft sand reserves are sufficient to maintain provision for 9.84 years. Soft sand production at the current rate will therefore continue to meet demand until at least 2032. However, soft sand supply is likely to become a regional issue, and it is important to ensure that there is not undue reliance on Surrey's reserves given the lack of identified additional sites and the significant environmental constraints on extraction of known resources which are largely within the Surrey Hills National Landscape.

**Table 7: New Soft Sand Reserves Needed to Maintain Future Landbank Requirements Based on APR of 0.5 mtpa**

Year	2024	2026	2028	2030
Reserves at start of year	4.92	3.92	2.92	1.92
Additional reserves to maintain 7-year landbank of 3.5 mt	-	-	0.58	1.58

62. To inform the preparation of the SMCS and PADPD the MPA reviewed potential mineral zones (PMZ) across the county for both soft sand and sharp sand and gravel. In total 51 PMZs were identified as holding reserves of soft sand estimated at 193 mt, of which some 5.63 mt were allocated for extraction in the PADPD.

63. There remains a theoretical soft sand reserve of some 187.63 mt in Surrey, distributed across Guildford, Waverley, Mole Valley and Tandridge. A small reserve of soft sand was also identified in Runnymede.

64. Much of the remaining reserve of soft sand occurs within the existing boundaries of the Surrey Hills National Landscape. If extraction within the National Landscape were to be ruled out the remaining reserve would reduce to some 28.03 mt.

65. A review of the boundary of the Surrey Hills National Landscape commenced in 2021 which identified candidate extension areas, some of which have now been recommended for inclusion within this designation. Based on work undertaken for the county council in 2023 which considered areas for inclusion within an extended designation and their potential to impact the county's primary aggregate resources, an extended Surrey Hills National Landscape may reduce soft sand resources to some 17.83 mt. However, not all this remaining resource would be viable for extraction owing to a range of other land-use planning constraints including proximity to sensitive receptors and environmental designations.

## **b) Recycled and secondary aggregates**

66. Current capacity of recycled and secondary aggregates facilities in Surrey is over 1.88 mtpa (See Appendix 2). However, some 65% of this capacity is provided by facilities with temporary planning permission. Hence, there is the likelihood of significant capacity loss over the next 10 years. Table 8 shows the capacity loss until 2035 based on current time limited permissions. However, there is still sufficient capacity to maintain a supply of at least 1.0 mtpa until at least 2030.

**Table 8: Recycling capacity (tonnes) lost based on current temporary permissions**

Site Name	Expiry	Capacity Loss	Cumulative Remaining Capacity*
Addlestone Quarry	2020	-225,000	1,656,700
Hithermoor Quarry	2022	-400,000	1,256,700
Stanwell Quarry	2027	-260,000	996,700
Homefield Sandpit	2030	-95,000	901,700
Queen Mary Quarry	2033	-175,000	726,700
Mercers South Quarry	2035	-75,000	651,700

\*Based on a starting capacity of 1,881,700

67. Although planning permission for Hithermoor Quarry has lapsed, a planning application (ref. SP21/01831/SCC) is being considered by the MPA which, inter alia, seeks to extend and link the life of the aggregate recycling facility to extraction of sand and gravel at King George VI Reservoir (preferred area H) over a period of some 16-years.
68. Similarly, planning permission at Addlestone Quarry has lapsed but consent (ref. RU.21/0085) is being sought to extend the life of the aggregate recycling facility to 31 December 2027 (at the earliest).

### **c) Imports through rail aggregate depots**

69. In view of the relatively low quantity of sand and gravel imported into Surrey directly, imports from the rest of the South East are likely to continue for the foreseeable future. However, this (partly) relies upon capacity being available at rail aggregate depots within surrounding MPA areas. This will continue to be explored in ongoing discussions and any progress in this regard will be reported in and inform future LAAs.
70. The demand for land-won imports is not anticipated to increase in the short to medium term. This is due to: (i) significant increases in recorded sales of recycled aggregates; and (ii) the improving position of Surrey's landbank for sand and gravel.
71. However, in the next 10 to 20 years it may become increasingly difficult to maintain a 7-year landbank for sharp sand and gravel. An increase in the demand for imports, potentially sourced from a wider catchment, is therefore anticipated in the long-term.

### **Imports of Marine aggregates:**

72. The marine sand and gravel landed at the South East wharves continues to be received from the East Coast, Thames, South Coast and East English Channel licensed dredging areas via existing rail depots. The Crown Estate advises that

there are significant reserves available to the south east ([SEEAWP Aggregates Monitoring Report 2014-2015](#)).

### **Imports of Crushed rock:**

73. Surrey imported at least 450,000 tonnes of crushed rock in 2019 of which over 80% was imported from Somerset with the remainder primarily sourced from Leicestershire and Derbyshire (8%) and Glensanda Quarry, Scotland via the Isle of Grain (12%). A significant amount of crushed rock is imported directly into Surrey via the rail depot in Woking. The remainder is likely to have been transported to rail depots just beyond the county boundary such as at Purley and then transported the short distance into Surrey by road.
74. Relevant LAAs from the MPAs where crushed rock is sourced suggest there will be no supply issues in the foreseeable future:
- [Somerset LAA 2022](#) indicates that the landbank for crushed rock was approximately 32.6 mt, sufficient for 23.7 years.
  - [Gloucestershire LAA 2021](#) indicates a crushed rock landbank totalled 26.78 mt with the remaining length of this landbank standing at 18.6 years.
  - [The Derbyshire and Peak District LAA 2022](#) explains that there is an estimated reserve of rock for aggregate use of over 506.8 mt. sufficient for 43 years.
  - [The Leicestershire LAA 2022](#) reports estimated permitted reserves of crushed rock at the end of 2018 were around 304 mt. This is sufficient permitted material to last about 23 years.

### **Rail depot infrastructure:**

75. Surrey has two rail aggregate depots at Woking and Salfords, both of which are safeguarded by the SMCS. Between them they present a good geographic spread between the west and east of the county. Their rail connections enable the supply of crushed rock from the West Country or crushed rock and marine sand and gravel from wharves on the Thames Estuary.
76. The facility at Woking is the principal rail depot in the county. The depot receives rail-borne imports of crushed rock from Torr Quarry in Somerset (approximately 50% of total imports to the Woking depot) and sharp sand and gravel imports from Greenwich and Newhaven wharves (approximately 50% of total imports to the Woking depot).
77. In total, Surrey imports over 1 mt of rail-borne aggregates each year, either directly or via surrounding rail depots. Of the total amount of aggregate imported into Surrey from surrounding rail depots, Crawley, Purley and Tolworth each contribute approximately one-third of total imports. The proportion imported from Colnbrook is not known but is thought to be low. [Annex 3](#) shows the location of rail aggregate depots located in Surrey and just beyond the county boundary.
78. In 2014, planning permission was granted for Salfords rail depot to develop a modern rail aggregate depot facility comprising the retention and relocation of the

existing facility within the site. The site has been inactive for several years. The new facility would be able to import up to 100,000 tpa of aggregates.

79. The 2007 regional study, [Aggregate Wharves and Rail Depots in South East England](#) estimated that rail aggregate depots in the South East had a capacity of 7.2 mt. The 2007 report is the most up to date assessment of aggregate wharves and rail depots in the South East, although capacity is not expected to have changed significantly since. Demand for imports of rail-borne aggregate were forecast to increase by 300,000 tonnes from 3.4 mt in 2006 to 3.7 mt in 2016, leaving a spare capacity of 3.5 mt. The report concluded that existing capacity was sufficient to handle the forecast growth in aggregate demand in 2016. The report also identified ten potential new sites, none of which were situated proximate to Surrey.

## 4. Assessment: demand versus supply

### a) Land-won aggregate from sources within Surrey

80. The rolling average of the 10-year average sales figure for land-won aggregates is likely to remain below the provision rate set out in the PADPD for the foreseeable future. Hence, the MPA has calculated an APR of 0.8 mtpa to be more in line with anticipated sales. Adopting this APR yields an aggregate landbank of 9.88\* years at the end of 2023.

#### Sharp sand and gravel:

81. The landbank at the end of 2023 is relatively unchanged at 9.95\* years, down slightly from the 10.17 years outlined in the LAA 2022. Three planning applications to extract aggregates from preferred areas identified in the PADPD are awaiting determination by the MPA.

82. There are sufficient preferred areas identified in the PADPD to enable a 7-year landbank to be maintained in the short to medium-term. Once these resources have been exhausted, opportunities to identify further preferred areas suitable for aggregate extraction are limited as remaining resources are increasingly depleted and planning constraints are tightened.

83. Assessment work undertaken in relation to the SMCS indicated that available resources for concreting aggregates were becoming more difficult to identify and there were no viable alternatives within the county to those proposed for inclusion as preferred areas within the PADPD. It was found that the most accessible sharp sand and gravel resources had already been exploited. Those that remained were more difficult to exploit because of their potential impact on local communities or the environment, or because they were too small to be economically viable, or because land ownership issues prevented their working.

84. For this reason, the PADPD recognised that the reserve position for land-won sharp sand and gravel could become critical over the latter part of the plan period. It states that "...identified potential reserves of concreting aggregates will be almost fully exploited before 2026 even under the low (production) scenarios". In relation to mineral resources generally, the Inspector's 2011 report associated with the SMCS acknowledged that "unlike some other counties with substantial unconstrained mineral resources, Surrey is not in the position where there are sites being held in reserve". Hence, although aggregate production has been lower than anticipated it is likely that reserves will not be sufficient to maintain a 7-year landbank in the long-term, and therefore increasing reliance will be placed on alternative sources of supply.

#### Soft sand:

85. The resource position for soft sand is slightly less favourable, with a 2023 landbank figure of 9.84 years, down from 10.23 years in 2022. Without additional sites

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\* Amended March 2025 to provide consistency with the BGS Aggregate Mineral Survey 2023.

coming forward the supply situation will inevitably become tighter towards the end of 2026.

86. The SMCS includes a presumption against new workings of soft sand within the Surrey Hills National Landscape because the mineral is not so scarce as to justify sufficient need (in the wider public interest), to outweigh the objectives to conserve the landscape and scenic beauty of the designation, which attracts the highest status of protection. This situation will continue to be monitored closely by the MPA, including in the preparation of the MWLP.

## **b) Alternative supply options**

### **Recycled and secondary aggregate:**

87. The production of recycled and secondary aggregates will go some way to providing an alternative to primary resources but will not eliminate the need for primary aggregates altogether. Production of recycled aggregates in Surrey from fixed sites has increased from 0.25 mt in 2007 to 1.23 mt in 2019, falling in 2020 and 2021 due to the Covid-19 pandemic, before rising again to 0.99 mt in 2022 and dropping to 0.77mt in 2023. In view of the importance of this alternative supply of aggregate it is appropriate to maintain provision for sufficient capacity to supply at least 1.0 mtpa.
88. Many of Surrey's aggregate recycling facilities are subject to temporary permissions, but sufficient capacity exists in the short to medium-term. The ARJDPD identifies specific sites that may be suitable for aggregates recycling and also includes a criteria-based policy to guide proposals for development of other sites. Aggregate recycling capacity will be reviewed and addressed by the MPA in preparing the MWLP.

### **Importing aggregates into Surrey:**

89. There is the potential for the Woking rail depot to be enhanced, and there is consent to build a modern rail depot at Salfords Depot. This would provide for increased imports of crushed rock, land-won sand and gravel, marine aggregates and recycled and secondary aggregates into the county by rail. The potential to import further aggregate material is further enhanced by the county's proximity to existing rail aggregate depot facilities at Brentford, Colnbrook, Tolworth, Purley and Crawley. These facilities also serve Surrey, primarily with crushed rock and marine sand and gravel.



## 5. Conclusion

90. Surrey has a broadly downward sales trend for sand and gravel; however, this includes lower than usual sales during the COVID-19 pandemic in 2020 and 2021 and the subsequent economic slowdown experienced in 2022-23. As such, the single-year sales, 3-year and 10-year average sales are down from 2022, with sales at the end of 2023 reported as 0.46 mt. Sufficient reserves are identified in the PADPD to enable Surrey to maintain a 7-year landbank in the short to medium term, based on an APR of 0.8 mt. The landbank at the end of 2023 was 9.88\* years.
91. At the end of 2023, soft sand sales were down from the 2022 figure at 0.34mt. The current supply situation is good, with a healthy 9.84-year landbank based on the current 0.8 mt APR. However, much of Surrey's resource is focused in the east of the county and within the Surrey Hills National Landscape, restricting future supply options. Inevitably, soft sand supply is likely to become more limited towards the end of the plan-period (2026).
92. Sharp sand and gravel sales were also down significantly relative to the 2022 figure at 0.12 mt. The landbank is slightly more favourable in terms of tonnage, with enough to provide for a 9.95\*-year landbank with the current 0.8 mt APR. Reserves should be bolstered in the short to medium-term by sites identified in the PADPD coming forward.
93. Recycled aggregate sales have decreased from 0.99 mt in 2022 to 0.77 mt in 2023, falling back below the 2026 target of at least 0.9 mtpa of recycled aggregate specified in the SMCS. This decrease is likely due to continued low levels of construction.
94. Surrey has only one active rail depot in Woking, with an inactive depot at Salfords and several depots located just beyond the county boundary. Both Woking and Salfords depots are safeguarded by the SMCS. As the county will increasingly rely upon imports in the future, Surrey has been working with operators to establish the capacity of rail depots within and proximate to Surrey to ensure future aggregate supply can be maintained.
95. Recent permissions and current planning applications to work preferred areas for sharp sand and gravel have the potential to significantly increase land won supply in future years, but alternative sources will play an increasingly important role. Preparation of the MWLP commenced in 2020 and is currently ongoing.

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\* Amended March 2025 to provide consistency with the BGS Aggregate Mineral Survey 2023.

# Annex 1: Sand and gravel sites in Surrey as of 31 December 2023

## Permitted Reserve Sites

List of sites with permitted reserves and which contributed towards Surrey's landbank on 31 December 2023.

### Sharp Sand and Gravel

Queen Mary Quarry, Staines  
Addlestone Quarry, Addlestone  
Homers Farm, Staines  
Manor Farm, Laleham  
Watersplash Farm, Shepperton

### Soft Sand\*

Moorhouse Sandpits, Limpsfield  
Mercers South Quarry, Nutfield  
Alton Road Sandpit, Farnham  
Homefield Sandpit, Guildford Road, Runfold

\*Note: North Park Quarry, Godstone and Land North East of Pendell Farm, Bletchingley are silica sand sites which may produce soft sand as a by-product of silica sand extraction. However, any sales of soft sand from these sites are classed as non-aggregate minerals for the purposes of this LAA.

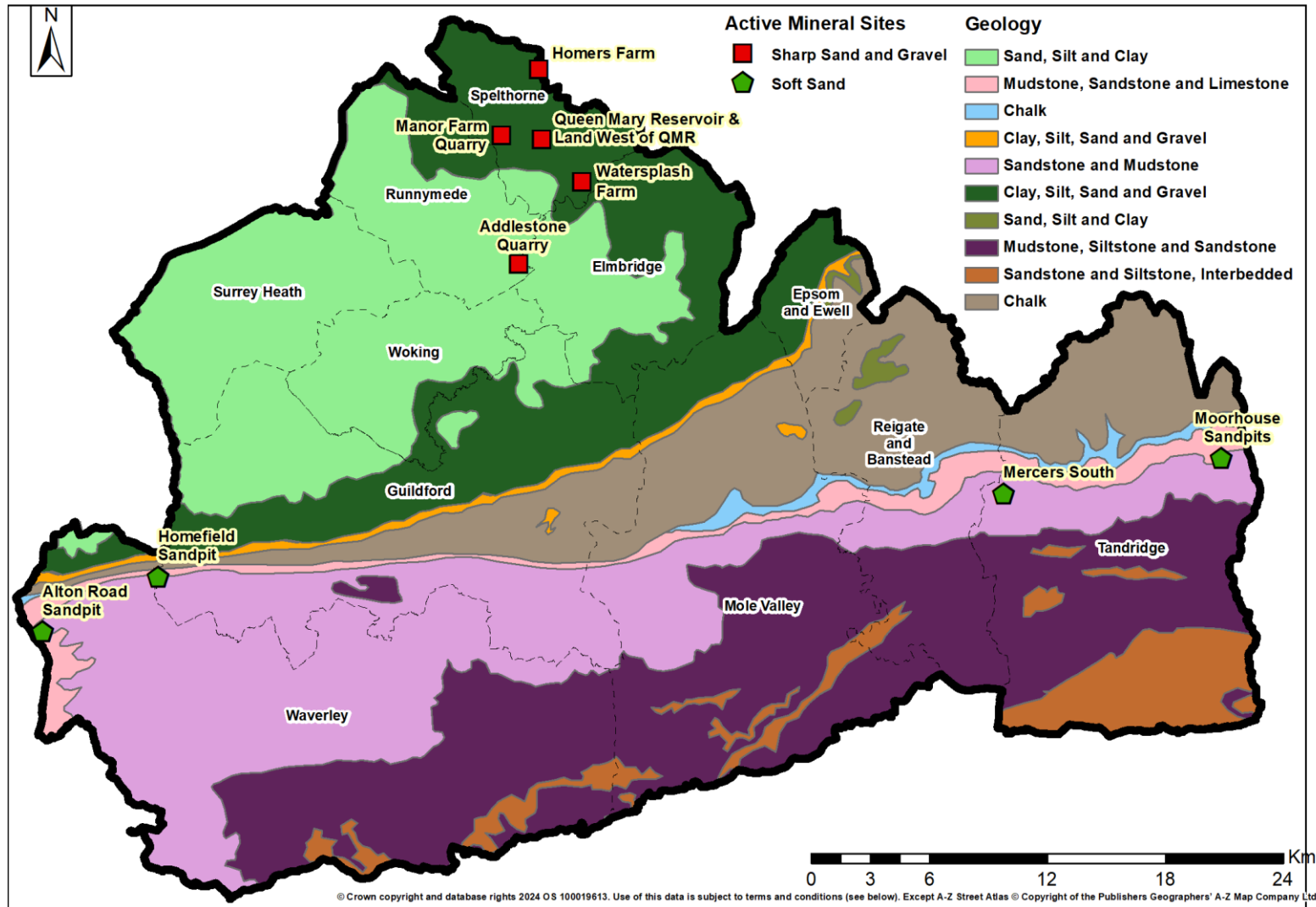
## Allocated Sand and Gravel Sites

Whitehall Farm, Egham (sharp sand and gravel)  
Milton Park Farm, Egham (sharp sand and gravel)  
King George VI Reservoir, Stanwell (sharp sand and gravel)  
Hamm Court Farm, Weybridge (sharp sand and gravel)  
Addlestone Quarry Extension, Addlestone (sharp sand and gravel)

## New Planning Permissions

No new permissions were granted between 1 January 2023 and 31 December 2023.

## Aggregate Resources and Sand and Gravel Sites in 2023



## Annex 2: Aggregate recycling facilities in Surrey 2023\*

Temporary sites	Capacity (tpa)
Queen Mary Quarry	175,000
Stanwell Quarry	260,000
Hithermoor Quarry	400,000
Addlestone Quarry	225,000
Mercers South Quarry	75,000
Homefield Sandpit	95,000
<b>Total</b>	<b>1,230,000</b>

Permanent sites	Capacity (tpa)
Sunnyside, Clasford Bridge	26,800
Capital House	18,000
Little Orchard Farm	195,000
Normans Corner	12,000
Perrylands	42,500
Reigate Road	35,000
Plough Industrial Estate	55,000
Kill Copse	11,500
Haysbridge Farm	41,500
Westfield Road	75,500
Ellerton Yard	90,900
Molesey Road, Weylands Treatment Works	48,000
<b>Total</b>	<b>651,700</b>

Total aggregate recycling capacity 2023 – 1,881,700 tpa

\* Site capacity has been calculated according to operator returns where available. Where this was not available, capacity has been taken from returns to the Environment Agency provided through the Waste Data Interrogator. Site capacities identified do not necessarily represent limitations imposed on relevant planning permissions.

## Annex 3: Rail aggregate depots within and close to Surrey 2023

Lit of active and inactive rail aggregate depots in and close to Surrey in 2023. Depots in Surrey are safeguarded by the Surrey Minerals Plan Core Strategy 2011 (Policy MC6).

### Rail aggregate depots in Surrey:

Woking Rail Aggregate Depot (Active)  
Salfords Rail Aggregate Depot (Inactive)

### Rail aggregate depots close to Surrey:

Tolworth Rail Aggregate Depot (Active)  
Purley Rail Aggregate Depot (Active)  
Crawley Rail Aggregate Depot (Active)  
Brentford Rail Aggregate Depot (Active)  
Colnbrook Rail Aggregate Depot (Active)

### Location of Rail Aggregate Depots in and close to Surrey

