

Surrey Local Aggregates Assessment 2022

December 2023



SURREY
COUNTY COUNCIL

Foreword

This Local Aggregates Assessment (LAA) assesses the demand for and supply of aggregates in Surrey for the reporting period of 1 January 2022 to 31 December 2022.

A copy of the LAA covering the period 1 January 2021 to 31 December 2021 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, 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 2022	Average annual sales and trend		Reserves 31/12/22	Reserves trend		Annual Provision Rate (APR) (million tonnes per annum)	Landbank (years)	Planned allocations outstanding	Capacity (at 31/12/22)
		10-year	3-year		10-year	3-year				
Soft (building) sand	409	458 (increase)	448 (decrease)	5,113	decrease	decrease	0.5	10.23	0	-
Sharp sand and gravel	151	311 (decrease)	232 (decrease)	3,022	increase	increase	0.3	10.07	7,620	
Total sand and gravel (S&G)	569	782 (no change)	713 (decrease)	8,135	decrease	increase	0.8	10.17	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 at rail depots	c	c	c	-	-	-	-	-	-	-
Imported CR at rail depots	c	c	c	-	-	-	-	-	-	
Secondary aggregate	18	Insufficient Data	Insufficient Data	-	-	-	1.0	-	-	1,823
Recycled aggregate	986	840 (increase)	770 (decrease)	-	-	-		-	-	

General Comments:

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

Due to economic uncertainty nationally, high inflation and a fall in construction activity, sales of aggregate minerals were generally lower than expected in 2022.

The overall landbank for sand and gravel of 10.17 years is above the National Planning Policy Framework 2023 (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 given the reduced 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 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:

Soft sand sales are down on 2021 figures, and on 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. The previous year’s Annual Provision Rate (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:

Sharp sand and gravel sales show a significant decrease on 2021 figures and are down on both the 10-year and 3-year sales averages. This is also likely due to economic factors and the costs of materials increasing, 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 reduced to 0.3mtpa to mirror the reality that sales have been lower than this for several years and are consistently lower than soft sand sales.

Comments on All Sand and Gravel:

Total sand and gravel sales for 2022 are down on 2021 figures, and down 26% and 20% on the 10-year and 3-year sales averages respectively. It appears unlikely that the downturn in the economy and construction activity will materially improve in the short-term. Due to this, the APR for total sand and gravel has been reduced to 0.8mtpa, down from the 1.0mtpa set out in the LAA 2021, and in line with the 10-year average of 0.78mtpa 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 2022 are up on 2021 figures and are broadly in line with sales data for the years before the Covid-19 pandemic. Supply is from fixed sites. There is no data from mobile plant on construction/demolition sites. The decrease in 3-year average sales is due to the 2020 and 2021 reporting data being affected by the Covid-19 pandemic. However, recycling rates appear to be rebounding, and 10-year sales average has increased. It is recommended that the previous year's APR of 1.0mtpa for recycled and secondary aggregates is carried forward into 2022.

1. Executive Summary

- Sales of sand and gravel at 0.57 million tonnes per annum (mtpa) in 2022 are below the 10-year sales average of 0.78 mtpa, and the 3-year sales average of 0.71 mtpa. Despite this, the 10-year sales average is unchanged from 2021.
- 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 and highway works indicate an increase in demand for aggregate in future years. However, the current economic situation of high inflation and falling construction activity casts doubt on this prospect in the short to medium term. Previously forecasted growth in sales in the 2021 LAA did not materialise, and sales fell instead.
- As a result, reduced Annual Provision Rates (APRs) of 0.3 mtpa for sharp sand and gravel and 0.5 mtpa for soft sand are used 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 10.17 years at the end of 2022 is balanced, with reserves of soft sand (10.23 years) and sharp sand and gravel (10.07 years). However, reserves of soft sand are still significantly higher at 5.1 million tonnes (mt), compared to 3.0 mt of sharp sand and gravel. As such, were demand for sharp sand and gravel to increase, the landbank could start to look unbalanced.
- Sharp sand and gravel resources are likely to be replenished in the short to medium term based on PADPD preferred areas. 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 Minerals and Waste Local Plan (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.

- 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 (SMP) target is for at least 0.9 mtpa by 2026; sales figures for 2020 and 2021 were below this figure because of the Covid-19 pandemic, however 2022 sales rebounded to exceed this target. 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 even more important, and this capacity will need to be secured and enhanced in the future.
- 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 MWLP will need to address the potential for new mineral sites and adequate aggregate recycling capacity and rail depot infrastructure, 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's (MPA) area. This LAA for Surrey for the 2022 calendar year is prepared by the MPA in accordance with national policy and guidance (NPPF para 213 and NPPG planning for aggregate minerals) and [supplementary guidance](#) adopted by the South East England Aggregates Working Party (SEEAWP).
2. When preparing an LAA, the MPA are required to set an Aggregate Provision Rate (APR) (sometimes referred to as an LAA Rate). The APR is a forecast of future aggregate demand, and is determined based on the MPA's judgement, considering factors including 10-year average sales, sale trends and other relevant local information.
3. The MPA have worked closely with SEEAWP in producing this LAA. As such, the summary dashboard has been modified from previous years to provide consistency with the LAAs of other MPAs in the South East of England. 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 (SMP) and the Surrey Minerals Plan Primary Aggregates Development Plan Document 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 six 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, Woking, Reigate, Redhill and Farnham.
7. Over 70% of Surrey benefits from one or more national or international landscape or nature conservation designations including 2 Areas of Outstanding Natural Beauty (AONB); 2 wetlands of international importance (Ramsar sites); 2 Special Protection Areas; 3 Special Areas of Conservation; 65 Sites of Special Scientific

Interest; 3 National Nature Reserves; and nearly 800 Sites of Nature Conservation Importance. Outside AONBs a substantial part of the county's land area is covered by an Area of Great Landscape Value designation, which is set by local planning policy.

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 some 6,000 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 Ancient Monuments.

a) Land-won sand and gravel

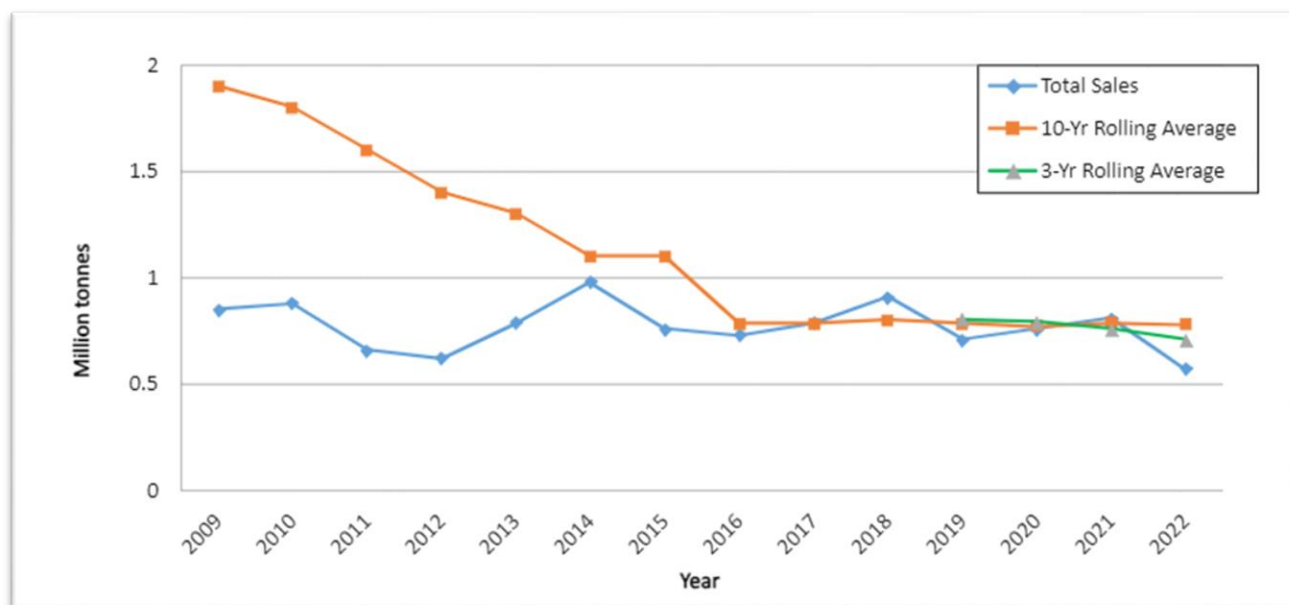
10. As a starting point, forecasting aggregate demand should be based on a rolling average of the past 10 years' sales data (National Planning Practice Guidance, DCLG, Updated 06 March 2014, Para 062).

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

	2013	2014	2015	2016	2017	2018	2019	2020	2021	2022	10yr Av	3yr Av
Soft sand	0.43	0.57	0.49	0.41	0.39	0.44	0.49	0.47	0.46	0.41	0.46	0.45
Sand & Gravel	0.36	0.41	0.27	0.39	0.41	0.50	0.24	0.26	0.34	0.15	0.31	0.23
Total	0.79	0.98	0.76	0.73	0.80	0.91	0.71	0.76	0.81	0.57	0.78	0.71

11. Between 2013 and 2022, total sales of land-won primary aggregates have been below the current 10-year average of 0.78 mt every year except for 2014, 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 difficulties.
12. The current 10-year average of past sales of 0.78 mt is well below the average minerals provision rate of 1.4 mtpa set by the PADPD. The 3-year average sales figure has decreased relative to the 2021 3-year average.

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. The [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 have been recent consultations on revised Statements relating to [Planning for new Energy Infrastructure](#) and [National Networks](#), which have not yet been adopted.
15. Short term major infrastructure projects will rely on existing sources of primary aggregate supply. The 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 2017 Surrey Infrastructure Study also sets out that delivering the necessary infrastructure to support that growth from now 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 (2013/14 to 2022/23) gives a 10-year average of 2,827 dwellings completed per annum. Predicted housing trajectories (from allocations in Local Plans) for Surrey over the next ten years (until 2032/33) suggest an average of 4,697 dwellings completed per annum. Were this level of housing to materialise, it would represent a 66% 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 2021 indicated that there would be a significant uplift in housing construction in 2022/23, an 84% increase compared to 2021/22. What materialised was instead a 14% fall in housing construction from 2021/22. This represented a drop of 44% from number of forecasted dwellings to the 3,080 completed dwellings ([Live Table on Housing 253](#)).

20. In addition, taking a sample of planning permissions from 2012-2020 in the South East of England, 41% 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 41% 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 2022/23. Doing so would result in a reduction of 2% relative to the existing 10-year average for housing completions.

22. However, while the 66% uplift identified above seems high, a 2% reduction also seems excessively low. It is acknowledged that 2022/23 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 between these projected figures. Calculating the average of the two figures provides for an uplift of 32%. While this is still 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 increase by 52% over the year. This amounts to a 39% increase in road spending overall. It should be noted however that the projected increase in maintenance spending is likely to be, in part, because of high inflation and increased material costs, meaning that an increased spend will not necessarily correlate with a rise in aggregate demand.
24. According to new figures released in the [quarterly survey](#) from the Mineral Products Association, actual sale volumes of key construction materials have declined nationwide, coupled with a drop in construction activity. Results show primary aggregate sales declining by 3.7% in Q2 of 2023, compared with Q1. The MPA attribute this decline in sales to the impact of prolonged, high levels of inflation, rising interest rates and weaker business confidence. The Mineral Products Association also cite labour and supply chain constraints that ultimately affect the cost of construction projects. These factors together lead to the Mineral Products Association predicting a second consecutive year of decline in sales volumes, with continued economic uncertainty.
25. More broadly, although the UK is on course to avoid a technical recession in 2023, economic growth remains marginal. Sentiment expressed by the Mineral Products Association in their quarterly survey is mirrored by the British Chamber of Commerce (BCC), which [upgraded its 2023 GDP forecast](#) to 0.3%, rising slightly to 0.6% in 2024 and 1.0% in 2025, with high inflation rates and labour market shortages continuing to weigh on growth. These limiting factors create a degree of uncertainty in the UK economy, with “the current trajectory of anaemic growth” unlikely to change according to the Head of Research at the BCC ([BCC, Economic Forecast, June 2023](#)). Similar conclusions have been drawn by the Organisation for Economic Cooperation and Development, [who expect modest GDP growth in 2024](#).
26. The economic outlook is likely to influence factors such as the price of materials and labour, which will likely in turn adversely impact business investment and consumer spending. This may then negatively affect the amount of housing that comes forward, and may affect road spending, both in terms of new projects coming forward and the cost of existing projects and maintenance.

27. In calculating any potential increase in aggregate demand based on the factors highlighted above, it is also 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.

28. Accordingly, proposed increases in aggregate demand are calculated using the sale rates for sand and gravel (including soft sand) over the past 10 years. 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 32% in Surrey.
- Assumption 2: Spending on roads is expected to increase by 39% 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 66% in Surrey.

29. Table 2 below sets out a number of 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
Assumptions applied	None	1,2,3,4	1,2	2,3,4,5	2,5
10-year average	778,000	778,000	778,000	778,000	778,000
Additional demand for housing	0	219,085	248,960	451,862	513,480
Additional demand for roads	0	112,265	303,420	112,265	303,420
Forecasted Annual Requirement	778,000	1,109,350	1,330,380	1,342,127	1,594,900

30. DFS 1 is simply the 10-year average for past aggregate sales. DFS 2 and 3 use the more conservative housing uplift figure of 32%, while DFS 4 and 5 use the unmitigated housing uplift figure of 66%.

31. For DFS 2 and 4, the additional demands for housing and roads were calculated by working out 88% (for homes) and 37% (for roads) of the 10-year average

sales figure of 778,000. 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.

32. 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 sales figure, and subsequently added to this figure.
33. 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 in particular the construction industry. With reference to the LAA 2021, a significant increase in housing construction and road spending was forecast, indicating a rise in aggregate demand. However, this did not materialise, and 2022 sales figures fell significantly from the previous year. As such, it is reasonable to reduce the APR to 0.8 mt for 2022, after which the rate will be reviewed, and increased should aggregate demand rise in line with the above forecasts.
34. Hence the situation will need to be monitored, but there is no evidence at present to suggest a major and sustained increase in aggregate demand from land won sources over and above the historic ten-year sales levels.

Conclusion and APR:

35. The current 10-year average of past sales (0.78 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 2023 sales will remain low as in 2022, due to the economic downturn. 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 and road building and maintenance programmes), but this is not expected to give rise to average sales approaching the PADPD provision rate of 1.4 mtpa. Indeed, sales are more likely to be closer to the current 10-year average of 0.78 mtpa.
36. 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 that, 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 2023 paragraphs 209 and 210b).
37. 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.

c) Recycled and secondary aggregates

38. The SMP set an ambitious target to supply at least 0.9 mtpa of recycled and secondary aggregates by 2026. In order to help achieve this target, the MPA adopted the Aggregates Recycling Joint DPD in 2013 which allocates / identifies 11 sites for aggregates recycling.
39. 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.
40. Significant progress has been made with production of recycled aggregates in Surrey from 2007 to 2022 with sales peaking at 1.23 mt in 2019. Sales declined in 2020/21, although this can be attributed to the effects of the Covid-19 pandemic.
41. The 2022 sales figure of 0.99 mt is up on the previous year's sales and exceeds the SMP 0.9 mtpa target. Although this is not as high as peak sales figures from 2017 and 2019, it matches sales figures for 2018 and shows a significant recovery since the pandemic, especially considering the low primary aggregate sales in 2022. Annual survey data only captures production from fixed sites, so actual production figures will be higher given the volumes of recycled aggregates produced on construction and demolition sites using mobile plant.

Table 3: Recycled Aggregate Sales in Surrey 2013-2022 (mt)

2013	2014	2015	2016	2017	2018	2019	2020	2021	2022	10yr Av	3yr Av
0.49	0.63	0.83	0.76	1.15	0.99	1.23	0.6	0.73	0.99	0.84	0.77

Conclusion and APR:

42. The ten-year average for recycled aggregate sales is 0.84 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, and a strong recovery in 2022. 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 SMP.

d) Imports and exports

Land-won sand and gravel:

43. 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 understood to have been brought in by rail or road, either directly from quarries or from rail depots primarily located just outside the county boundary.

44. 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 significant 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.
45. 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:

46. 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 million tonnes 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).
47. 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:

48. 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 2012-2022 (million tonnes)

Year	2012	2013	2014	2015	2016	2017	2018	2019	2020	2021	2022
Sharp Sand and Gravel	1.92	1.75	1.49	3.43	3.29	3.20	2.73	1.99	1.93	1.90	3.02
Soft Sand	7.35	4.38	8.53	8.17	7.85	7.71	7.18	5.86	5.97	5.53	5.11
Total Reserves	9.37	6.13	10.02	11.60	11.14	10.91	9.91	7.85	7.90	7.47	8.14

49. Based on the APR of 0.8 mtpa for total 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 8.14 mt at the end of 2022 are sufficient to maintain provision for over 7 years at the APR of 0.8 mtpa.

50. The PADPD identifies 11 preferred areas estimated to supply 15.42 mt over the plan-period 2009 to 2026. At the end of December 2022, 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	2023	2025	2027	2029
Reserves at start of year	8.14	6.54	4.94	3.34
Additional reserves to maintain 7-year landbank of 5.6 mt	-	-	0.66	2.26

51. 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:

52. Based on the APR of 0.3 mtpa, reserves are sufficient to maintain provision for 10.07 years.

53. 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 SMP:

- 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).

54. 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).

55. 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).

56. 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	2023	2025	2027	2029
Reserves at start of year	3.02	2.42	1.82	1.22
Additional reserves to maintain 7-year landbank of 2 mt	-	-	0.18	0.78

Soft sand:

57. 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 AONB designation.

58. 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 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.

59. 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 10 years.

60. Using the APR of 0.5 mtpa, soft sand reserves are sufficient to maintain provision for 10 years. Soft sand production 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 on known resources which are largely within the AONB.

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

Year	2023	2025	2027	2029
Reserves at start of year	5.11	4.11	3.11	2.11
Additional reserves to maintain 7-year landbank of 3.5 mt	-	-	0.39	1.39

61. To inform the preparation of the SMP 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.
62. 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.
63. Much of the remaining reserve of soft sand occurs within the existing boundaries of the Surrey Hills AONB. If extraction within the AONB were to be ruled out the remaining reserve would reduce to some 28.03 mt.
64. A review of the boundary of the Surrey Hills AONB commenced in 2021, which is expected to result in additional areas of land being covered by extensions to the existing AONB boundary. Based on work undertaken for the county council in 2013, which identified areas suitable for inclusion within an extended AONB, the soft sand reserves that would be found outside the extended AONB would reduce to some 17.83 mt.

b) Recycled and secondary aggregates

65. Current capacity of recycled and secondary aggregates facilities in Surrey is over 1.7 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 2028.

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

Site Name	Expiry	Capacity Loss	Cumulative Remaining Capacity*
Addlestone Quarry	2020	-200,000	1,622,700
Hithermoor Quarry	2022	-400,000	1,222,700

Stanwell Quarry	2027	-260,000	962,700
Homefield Sandpit	2030	-70,000	892,700
Queen Mary Quarry	2033	-175,000	717,700
Mercers South Quarry	2035	-75,000	642,700

*Based on a starting capacity of 1,822,700

66. 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.
67. 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

68. In view of the relatively low quantity of land-won sand and gravel imports into Surrey, imports from the rest of the South East are likely to be able to continue for the foreseeable future. However, this relies upon capacity being available at rail aggregate depots within surrounding MPA areas. This will continue to be explored in ongoing Duty to Cooperate discussions, and any progress in this regard will be reported in and inform future LAAs.
69. 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.
70. 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:

71. 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:

72. 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.

73. Relevant LAAs from the MPAs where crushed rock is sourced suggest there will be no supply issues in the foreseeable future:

- [Somerset LAA](#) 2021 indicates that the landbank for crushed rock was approximately 36.9 mt, sufficient for 25.4 years.
- [Gloucestershire LAA 2020](#) indicates a crushed rock landbank totalled 22.22 mt with the remaining length of this landbank standing at 15.37 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 provision.
- [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:

74. Surrey has two rail aggregate depots at Woking and Salfords, both of which are safeguarded by the SMP. 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.

75. 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).

76. 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.

77. 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 which is well in excess of the tonnages handled during the most recent years in which the facility has been active.

78. 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. 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

79. The rolling average of the 10-year average past 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 10.17 years at the end of 2022.

Sharp sand and gravel:

80. Although the landbank at the end of 2021 was 3.8 years, under the revised APR and with the additional reserves provided by Watersplash Farm (Area L of the PADPD), the landbank at the end of 2022 is more favourable at 10.07 years. Further, three planning applications to extract aggregates from other preferred areas identified in the PADPD are awaiting determination.

81. 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 the identified resources become increasingly depleted and planning constraints become tighter.

82. Assessment work undertaken in relation to the SMP indicated that available resources for concreting aggregates were becoming increasingly difficult to identify and that 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, because they were too small to be economically viable, or because land ownership issues prevented their working.

83. 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 SMP 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:

84. The resource position for soft sand is more favourable, as the 2022 landbank figure is 10.2 years. However, without additional sites coming forward the supply situation will inevitably become tighter towards the end of the plan period.

85. The SMP includes a presumption against new workings of soft sand within the Surrey Hills AONB because it 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.

b) Alternative supply options

Recycled and secondary aggregate:

86. The production of recycled and secondary aggregates will go some way to providing an alternative but will not eliminate the need for primary aggregates. Production in Surrey from fixed sites has increased from 0.25 mt in 2007 to 1.23 mt in 2019, dropping to 0.6mt in 2020 and 0.73 mt in 2021 due to the Covid-19 pandemic, before rising again to 0.99 mt in 2022. In view of the importance of this alternative supply of aggregate it is appropriate to make provision for a capacity of at least 1.0 mtpa to be sustained.
87. 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 site allocations for aggregates recycling and also includes a criteria-based policy to guide proposals for development on non-allocated sites. Aggregate recycling capacity will be reviewed and addressed by the MPA in preparing the MWLP which began in 2020.

Importing aggregates into Surrey:

88. There is the potential for the Woking rail depot to be enhanced, and there are proposals to build a modern replacement facility at Salfords Depot. Such enhancements 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

89. Surrey has a broadly upwards sales trend for sand and gravel; however, this has been tempered by lower than usual sales during the COVID-19 pandemic in 2020 and 2021, and during the economic slowdown experienced in 2022. As such, both single-year and 3-year average sales are down from 2021, with sales at the end of 2022 reported as 0.57 mt. Sufficient reserves are identified in the PADPD to enable Surrey to maintain a 7-year land bank in the short to medium term, based on the revised APR of 0.8 mt. The land bank at the end of 2022 was 10.17 years.
90. At the end of 2022, soft sand sales were down from the 2021 figure at 0.41mt. The current supply situation is good, with a healthy 10-year land bank with the current APR. However, much of Surrey's resource is focused on the east of the county and within the Surrey Hills AONB, restricting future supply options. Inevitably, soft sand supply is likely to become more limited towards the end of the plan period.
91. Sharp sand and gravel sales were also down significantly on the 2021 figure at 0.15 mt. The landbank is less favourable in terms of tonnage, but there is enough to provide for a 10-year landbank with the current APR. Reserves should be bolstered in the short to medium term by sites identified in the PADPD coming forward.
92. Recycled aggregate sales have increased from 0.7 mt in 2021 to 0.98 mt in 2022, exceeding the 2026 target of at least 0.9 mtpa of recycled aggregate specified in the SMP for the first time since 2019. The decrease in the 2020/2021 sales can be attributed to the impact of the Covid-19 pandemic.
93. 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 SMP. 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.
94. Recent permissions and current planning applications to work preferred areas for aggregate extraction have the potential to significantly increase land won supply in future years, but alternative sources will continue to be important to supply. Preparation of the MWLP commenced in 2020.

Annex 1: Sand and gravel sites in Surrey as of 31 December 2022

Permitted Reserve Sites

List of sites with permitted reserves and which contributed towards Surrey's landbank on 31 December 2022.

Sharp Sand and Gravel

Queen Mary Quarry, Staines
Homers Farm, Staines
Manor Farm, Laleham
Addlestone Quarry, Addlestone
Hithermoor Quarry, Stanwell Moor
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 such soft sand are classed as non-aggregate minerals for the purposes of this LAA.

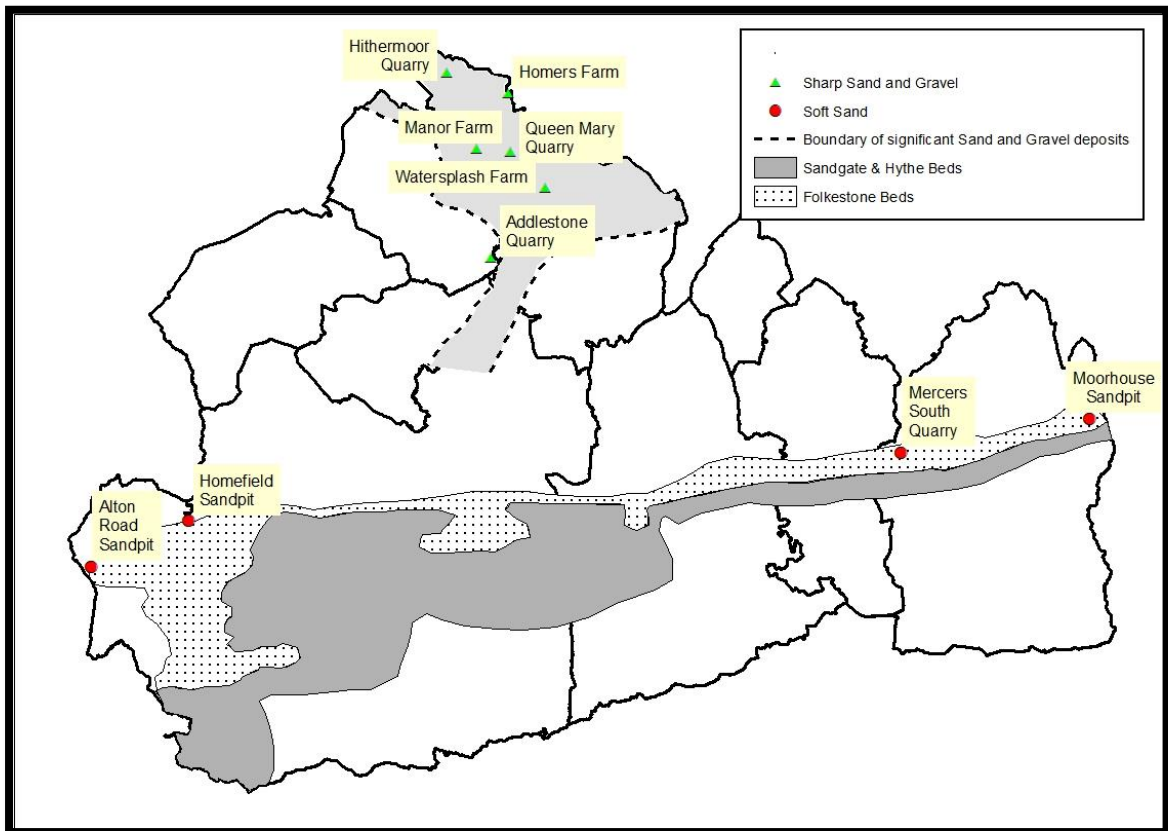
Allocated Sand and Gravel Sites

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 2022 and 31 December 2022.

Aggregate Resources and Sand and Gravel Sites in 2022



Annex 2: Aggregate recycling facilities in Surrey 2022*

Temporary sites	Capacity (tpa)
Queen Mary Quarry	175,000
Stanwell Quarry	260,000
Hithermoor Quarry	400,000
Addlestone Quarry	200,000
Mercers South Quarry	75,000
Homefield Sandpit	70,000
Total	1,180,000

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	46,000
Kill Copse	11,500
Haysbridge Farm	41,500
Westfield Road	75,500
Ellerton Yard	90,900
Molesey Road, Weylands Treatment Works	48,000
Total	642,700

Total aggregate recycling capacity 2022 – 1,822,700 tpa

* Site capacity has been calculated according to operator returns where available. Where this was not available, capacity has been taken from Surrey's most recent Waste Capacity Needs Assessment (currently in preparation, and due to be published on Surrey County Council's website).

Annex 3: Rail aggregate depots within and close to Surrey 2022

Lit of active and inactive rail aggregate depots in and close to Surrey in 2022.
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

