Surrey County Council
Surrey Local Aggregate Assessment
February 2019
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<th>Date published</th>
<th>Amendments</th>
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<td>February 2019</td>
<td>Addition of a conclusion at the end of the document.</td>
<td>Feedback from SEEAWP meeting November 2018</td>
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<td><strong>Sales</strong> 2017</td>
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<tr>
<td>Sharp Sand &amp; Gravel</td>
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<td>Soft Sand</td>
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<td>All Sand &amp; Gravel</td>
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<td>Rail Depot Sales (Crushed Rock)</td>
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¹ All sales figures in millions of tonnes rounded to one decimal place
² This is the provision made in the Surrey Minerals Plan
³ See paragraphs 3.1.2 to 3.1.11
⁴ See paragraphs 3.1.12 to 3.1.16
⁵ Target for 2016 in Surrey Minerals Plan and in Surrey Waste Plan 2008
The Surrey Minerals Plan provides sufficient capacity to enable production of land won concreting aggregates 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 combined total is about 40% higher than the current ten year rolling average of past sales for primary land-won aggregates at 0.85 mt. The current 3 year sales average at 0.75 mt is supplemented by a significant upward trend in recycled aggregates sales and increased imports of marine and land won aggregates and crushed rock. Recent permissions and current planning applications at preferred areas have the potential to significantly increase land won supply but alternative sources will continue to be important. There is no immediate need to review the Minerals Plan at this point, we are anticipating beginning the review of the Minerals Plan in 2020.
1 Executive Summary

1.1 Introduction

1.1.1 A Local Aggregate Assessment (LAA) is an annual assessment of the demand for and supply of aggregates in a mineral planning authority’s (MPA) area. This LAA for Surrey is prepared by the MPA in accordance with national policy and guidance and guidance prepared by the Planning Officers Society and the Mineral Products Association.

1.1.2 Surrey County Council’s Annual Monitoring Report (AMR) sets out Surrey’s position on aggregate sales. This LAA draws on data obtained from the AMR 2016/17 and 2017/18, the most recent data available from the 2017 Aggregates Monitoring Survey for Surrey (as summarized by the Aggregates Monitoring Update 2018), the South East Aggregates Monitoring Report 2016/17, and an extract from the Aggregate Minerals Survey 2015 for England and Wales, supplemented by information on marine sand and gravel published by The Crown Estate and the Marine Management Organisation (MMO).

1.1.3 At its meeting on the 19th of November, 2018 the South East England Aggregates Working Party (SEEAWP) agreed with the conclusions of the Surrey LAA, subject to some minor amendments.

1.2 Aggregates in Surrey

1.2.1 Aggregate deposits in Surrey comprise sharp sand and gravel (concreting aggregates) and soft sand. The coarse sharp sand and gravel are mainly found as flood plain and terrace deposits in the valleys of the main rivers. Sharp sand and gravel is currently supplied from two active sites in Surrey (see Annex 1).

1.2.2 Soft sand is located 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 five active sites in Surrey (see Annex 1).

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6 See NPPF para 145 and NPPG Planning for Aggregate Minerals.
7 Practice Guidance on the Production and Use of Local Aggregate Assessments POS/MPA May 2017
8 Production from Addlestone Quarry comprised sharp sand and gravel or hoggin for construction fill, which is lower quality material not capable of being used as a concreting aggregate.
1.3 Demand indicators

1.3.1 The sales of primary land-won aggregates increased by some 8.22% from 2016 to 2017, from 0.73 million tonnes (mt) to 0.79 mt. This is primarily due to an extension of time being granted to operations at Addlestone Quarry in 2015, which has contributed to an increased sales figure in 2016 and 2017.

1.3.2 Sales at 0.79 mtpa in 2017 are below the 10 year average of 0.85 mtpa. The 10 year average is 39% below the average provision rate in the SMP 2011 of 1.4 mtpa between 2009 and 2026.

1.4 Supply

1.4.1 The total landbank of 7.8 years at the end of 2017 masks a significant imbalance between reserves of soft sand (15.4 mt) and concreting aggregates (3.6 mt).

1.4.2 Mineral resources are dwindling, and concreting aggregate resources are likely to have been largely depleted by around 2030. As these become exhausted, alternative sources of supply will increasingly be required.
1.4.3 The 10 year trend for sales of recycled and secondary aggregates is an increase from 0.25 mt in 2007 to 1.15 mt in 2017. The SMP 2011 target is for at least 0.8 mtpa by 2016 and 0.9 mtpa by 2026, both of which were exceeded by the 2017 sales figure.

1.4.4 Seven rail depots within and just outside the county enable Surrey to import a plentiful supply of crushed rock from Somerset and marine aggregates primarily from wharves on the Thames Estuary (See Annex 3).

1.5 Environmental constraints

1.5.1 Surrey is heavily constrained by the Surrey Hills AONB and by development in the north-west of the County.

1.5.2 There are therefore limited prospects to identify suitable additional sites for primary land won aggregates in Surrey beyond those already identified in the Surrey Minerals Plan 2011 (SMP).

1.6 Balance between supply and demand

1.6.1 The SMP Core Strategy and Primary Aggregates DPDs provide sufficient capacity to enable production of concreting aggregates 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 combined total is 20% higher than the current ten year rolling average of past sales for primary land-won aggregates and is likely to remain higher for the foreseeable future. This is considered to provide a generous margin of flexibility to cater for any fluctuations in demand.

1.6.2 Indeed, supply from identified resources will extend beyond the end of the plan-period in 2026 although by this time, it is unlikely that a 7 year landbank will be capable of being achieved. Given the continued and growing availability of alternative sources of supply such as marine sand and gravel and recycled and secondary aggregates, this will help to maintain an adequate supply of aggregates in Surrey.

1.7 Conclusions

1.7.1 There is no immediate need to review the Minerals Plan, nevertheless we are anticipating beginning the review of the Minerals Plan in 2020 in accordance with the adopted Minerals & Waste Development Scheme. In anticipation of this the LAA rate will also need to be reviewed in 2019. Until then, the 1.4 mtpa average provision figure for 2009-2026 remains a robust and generous estimate of average future demand.

1.7.2 As concreting aggregates are worked out in Surrey there will be an increase in demand for alternative sources of supply. It is therefore possible that Surrey might change from a net exporter to a net importer of sand and gravel. As well as being reliant on imports

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9 The sales trend is year on year increases, excluding a decrease in sales in 2016.
of crushed rock, Surrey will therefore become increasingly reliant in future on recycled and secondary aggregates, imports of marine aggregates from wharves on the Thames Estuary, imports of land-won sharp sand and gravel and, in the longer term, soft sand imports from other counties.

1.7.3 It is therefore important to ensure the continued safeguarding of mineral resources and infrastructure including rail depot facilities.
2 Forecast of aggregate demand

2.1 10 years sales data

2.1.1 As a starting point, forecasts of aggregate demand should be based on a rolling average of the past 10 years’ sales data\(^\text{10}\).

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

<table>
<thead>
<tr>
<th></th>
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</tr>
</thead>
<tbody>
<tr>
<td>Soft sand</td>
<td>0.43</td>
<td>0.31</td>
<td>0.29</td>
<td>0.35</td>
<td>0.37</td>
<td>0.43</td>
<td>0.57</td>
<td>0.49</td>
<td>0.41</td>
<td>0.39</td>
<td>0.40</td>
</tr>
<tr>
<td>Concreting Aggregate</td>
<td>0.92</td>
<td>0.54</td>
<td>0.59</td>
<td>0.31</td>
<td>0.20</td>
<td>0.33</td>
<td>0.41</td>
<td>0.24</td>
<td>0.31</td>
<td>0.40</td>
<td>0.40</td>
</tr>
<tr>
<td>Sand &amp; Gravel or Hoggin for Construction Fill</td>
<td>-</td>
<td>-</td>
<td>-</td>
<td>0.05</td>
<td>0.03</td>
<td>-</td>
<td>0.03</td>
<td>0.08</td>
<td>0.01</td>
<td>0.04</td>
<td></td>
</tr>
<tr>
<td>Total</td>
<td>1.35</td>
<td>0.85</td>
<td>0.88</td>
<td>0.66</td>
<td>0.62</td>
<td>0.79</td>
<td>0.98</td>
<td>0.76</td>
<td>0.73</td>
<td>0.80</td>
<td>0.85</td>
</tr>
</tbody>
</table>

2.1.2 Between 2011 and 2017, total sales have been considerably below the current 10 year average of 0.85 mt (with the exception of 2014) due to the completion of mineral extraction at a number of quarries as well as the impact of the economic downturn between 2008 and 2013.

2.1.3 The increases to total sales reported in 2013 and 2014 did not continue into 2015, when sales fell by 22%. Sales also reduced in 2016 by 4% to 0.73 mt, but picked up slightly in 2017 to 0.8 mt, a 10% increase. This is largely attributed to supply constraints resulting from the closure of Home Farm Quarry in summer 2015. The increase in the sales figure in 2018 can be largely attributed to the extension of workings at Addlestone Quarry.

2.1.4 The current 10 year average past sales figure of 0.85 mt is 39% below the average minerals provision rate of 1.4 mtpa between 2009 and 2026 contained in the SMP Primary Aggregates DPD.

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\(^{10}\) National Planning Practice Guidance, DCLG, Updated 06 March 2014, Para 062
2.2 3 years sales data

2.2.1 The average 3 years past sales for land-won sand and gravel in Surrey is low at 0.75 mt. This is largely due to supply side restrictions as a result of the closure / mothballing of a number of quarries in recent years as they reach the end of their working and some sites that have permissions but are not being worked yet, resulting in a reduced number of active sites (See Annex 1).

2.2.2 Accordingly, although there was an increase in primary aggregate sales recorded in Surrey of 24% between 2013 and 2014, there was a relatively sharp drop between 2014 and 2015 (22% decrease). Followed by an increase in primary aggregate sales from 2016 to 2017 (8.22% increase). The 3 year average past sales figure for Surrey is not considered to provide an accurate indication of the likely future demand for land-won sand and gravel. Future demand is considered likely to be considerably higher and more akin to the 10 year rolling average past sales figure of 0.85 mt, given the county’s proximity to London and its centrality within the south east region.

2.3 Other relevant local information

2.3.1 The National Infrastructure Delivery Plan 2016 - 2021\(^\text{11}\) sets out the government’s infrastructure plans for the next parliament and beyond. Annex A lists the government’s top 40 priority investment projects.

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\(^{11}\) National Infrastructure Delivery Plan 2016 - 2021, HM Treasury, March 2016 - 2021

Surrey County Council LAA 2018
2.3.2 Projects in close proximity to Surrey, with forecast finish dates shown in brackets, include:

1. Accelerated Roads: M3 Junction 2 to 4a under construction (2016/17);
2. Smart Motorways: M4 Junctions 3 to 12 commences 2016/17 (2021/22);
3. Rail: High Speed 2 (HS2) commences 2017 (2033);
4. Rail: Crossrail under construction (2019);
5. Rail: Thameslink under construction (2018);
6. Rail Investment Strategy: Great Western Programme under construction (May 2018);
7. Airport Infrastructure Improvements: Heathrow Q6 under construction (2019);
8. Airport Infrastructure Improvements: Gatwick Q6 under construction (2020);
9. Transport for London Major Schemes: Northern Line Upgrade under construction (2020) and Bank Station substantial capacity upgrade commences in 2016 (2021);
10. Local Transport: Northern Line Extension commences in 2015 (2020);
11. Electricity Interconnection: London Power Tunnels under construction (2018);
12. Water: Thames Tideway Tunnel commences in 2016 (2023);
13. Flood and Coastal Erosion Risk Management: River Thames (Datchet to Teddington) commences 2019/20 (2023/24);

2.3.3 Short term major infrastructure projects will rely on existing sources of supply. The more significant and longer term infrastructure schemes are likely to tend to rely on imports of crushed rock and marine sand and gravel landed at wharves on the Thames Estuary. For example, the MMO have stated that marine aggregate resources have supported a number of prestigious developments in the south east including Canary Wharf, the Channel Tunnel Rail Link, Heathrow Terminal 5, the 2012 London Olympics and the regeneration of the Thames Gateway\(^\text{12}\). This appears to reflect diminishing land won supplies in London and the South East.

2.3.4 The Surrey Future project brings together Surrey’s local authorities and business leaders to agree the investment priorities to support the county’s economy over the next few decades. These investment priorities include:

- A3 Corridor: Improvements including the Junction 10 Wisley Interchange;
- 23 major transport schemes planned to tackle areas of significant congestion in town centres and improve and modernise key road junctions;
- Improvements to the North Downs Line including electrification;
- Crossrail 2 regional route;

• Improving journey times to Heathrow and Gatwick airports through improvements on a number of routes including the A23/M23 Hooley Junction.

2.3.5 Funding has not been secured for all of these transport schemes. The potential demand for aggregates to support these schemes is difficult to quantify but is not anticipated to place a strain on the county’s aggregate resources. This is because transport improvement schemes are undertaken on an ongoing basis and are not anticipated to result in an increase in the demand for aggregates.

2.3.6 Schools Capital Programme. Due to significant demand for school places in Surrey, 13,000 new places for pupils have been created over the past 5 years and a further 16,000 places are required by 2018. This could involve several major school building expansions overall, including the construction of new primary and secondary schools. Nevertheless, since the future building programme is not significantly greater than that carried out over the past five years, a consequential sustained increase in demand for aggregates is not anticipated.

2.3.7 Major new housing projects and associated infrastructure will maintain demand for primary aggregates in Surrey. Future provision for new housing being made in existing and emerging local plans in Surrey is 3,188 dwellings per annum over the period 2016 to 2030. This is very close to the historic 10 year average net completion rate of 3,049 dwellings. Actual completions may well exceed this in time but there is no indication of significant and sustained growth above this historic average. New housing accounts for approximately 20% of aggregate use and is generally considered a useful proxy for overall aggregate demand.

2.3.8 Many of the Districts and Boroughs within the County are either in the process of reviewing their Local Plans or in the case of Runnymede and Tandridge are close to the examination stage of their emerging Local Plans. This will have an impact on the provision of new housing within the county with some districts increasing their original targets to meet increased demand for housing within the County.

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13 Surrey County Council Annual Monitoring Report 2015/2016, Section 2.3
2.4 Conclusion

2.4.1 The current 10 year average past sales figure of 0.85 mt covers periods of both economic growth and recession and is expected to be relatively consistent in the short to medium term. Some growth in demand for primary aggregates is anticipated but, given the economic uncertainty surrounding the United Kingdom’s vote to leave the European Union and the fall in exchange rate, this is not expected to give rise to ten year average past sales in excess of the minerals provision rate of 1.4 mtpa included in the SMP.
3 Future supply options

3.1 Land-won sand and gravel

3.1.1 Historically, Surrey has been a significant contributor towards the supply of sand and gravel in London and the south east. Figure 4 shows the trend in sales of land-won primary aggregates originating from Surrey since the historical peak in 1994, relative to the relevant minerals provision rate. Figure 5 shows the sales of soft sand and concreting aggregates in Surrey 1994 to 2017.

Figure 4: Sales of Land-won Sand and Gravel in Surrey 1994-2017
3.1.2 Permitted reserves of land-won sand and gravel in the south east fell by 12.4% between 2005 and 2015 from 87.3 million tonnes (mt) to 76.4 mt\textsuperscript{14}. In contrast, reserves in Surrey increased by some 21% over the same period to 10.9 mt as shown in Table 2 below. This increase has largely been as a result of the grant of planning permission to extract 4.1 mt of soft sand from one particular site\textsuperscript{15} in Surrey.

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<tr>
<td><strong>Concreting Aggregate</strong></td>
<td>5,200</td>
<td>4,647</td>
<td>3,250</td>
<td>2,264</td>
<td>2,315</td>
<td>3,129</td>
<td>2,454</td>
<td>1,865</td>
<td>1,923</td>
<td>1,750</td>
<td>1,488</td>
<td>3,432</td>
<td>3,294</td>
<td>3,195</td>
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<tr>
<td><strong>Soft Sand</strong></td>
<td>6,800</td>
<td>4,365</td>
<td>5,337</td>
<td>7,480</td>
<td>7,958</td>
<td>8,297</td>
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<td>7,281</td>
<td>4,366</td>
<td>8,528</td>
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<td>0</td>
<td>0</td>
<td>60</td>
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<tr>
<td><strong>Total Reserves</strong></td>
<td>12,000</td>
<td>9,011</td>
<td>8,586</td>
<td>9,744</td>
<td>10,273</td>
<td>11,426</td>
<td>9,876</td>
<td>9,088</td>
<td>9,373</td>
<td>6,125</td>
<td>10,016</td>
<td>11,601</td>
<td>11,142</td>
<td>10,914</td>
</tr>
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</table>

3.1.3 The Aggregates Minerals Survey 2015 indicates a considerable increase in the county’s landbank from 4.4 to 8.3 years between the end of 2013 and 2015\textsuperscript{17}. At the current DPD minerals provision rate of 1.4 mtpa, a permitted reserve of at least 9.8 mt is required to maintain a landbank of at least 7 years. With remaining permitted reserves

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\textsuperscript{14} South East Aggregates Monitoring Report 2014-2015
\textsuperscript{15} Mercers South, Nutfield, Redhill, Surrey, RH1 4EU
\textsuperscript{16} Note that 2004 reserve figures are estimates
\textsuperscript{17} Aggregate Minerals Survey 2015
of 10.86 mt at the end of 2017, this is sufficient to maintain provision for 7.9 years at the SMP minerals provision rate, being 7.8 years based on the 2017 sales.

3.1.4 The SMP Primary Aggregates DPD identifies 11 preferred areas estimated to supply 15.42 mt over the plan-period 2009 to 2026. At the end of December 2017, some 8.87 mt of reserve identified in the SMP had yet to be granted planning permission (See Annex 1). Taking into account permitted reserves that would be worked during the plan-period, the SMP makes provision for around 24 mt (1.4 mtpa) of primary aggregates. This is sufficient to enable a 7 year landbank to be maintained until around 2023. This provision rate is higher than the 10 year rolling average of past sales at 0.85 mt. If average sales were to remain less than 1.4 mtpa in the coming years, a 7 year landbank could potentially be maintained for a longer period.

Table 3: New Sand and Gravel Reserves (mt) needed to Maintain Future Landbank Requirements Based on Average Minerals Provision Rate of 1.4 mtpa\(^\text{18}\)

<table>
<thead>
<tr>
<th>Year</th>
<th>2018</th>
<th>2020</th>
<th>2022</th>
<th>2024</th>
<th>2026</th>
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<tbody>
<tr>
<td>Reserves at start of year</td>
<td>11.1</td>
<td>8.3</td>
<td>6.0</td>
<td>3.2</td>
<td>0.4</td>
</tr>
<tr>
<td>Additional reserves to maintain 7 year landbank of 9.8 mt</td>
<td>-1.3</td>
<td>1.5</td>
<td>4.3</td>
<td>7.1</td>
<td>9.9</td>
</tr>
</tbody>
</table>

3.1.5 The rise in the county’s landbank over recent years is primarily due to the granting of planning permission for the extraction of a combined total of around 3 mt of primary aggregates. This included permission for 2.279 mt of sharp sand and gravel at Homers Farm, Bedfont; Manor Farm Laleham; and Addlestone Quarry, New Haw; and 0.77 mt of soft sand at Alton Road Sandpit, Farnham. The latter two involved extensions of time for mineral working where planning permission had expired and the sites had been mothballed for a number of years.

3.1.6 The DPD 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 therefore analysed in turn below.

3.1.7 Concreting aggregates

3.1.8 The Aggregate Minerals Survey 2015 highlights a 43% increase in the county’s landbank for concreting aggregates between the end of 2014 and 2015. At the current SMP Primary Aggregates DPD minerals provision rate of 0.9 mtpa for concreting aggregates up to 2026, a reserve of 6.3 mt would be required to maintain a 7 year landbank. With remaining permitted reserves of just 3.19 mt at the end of 2017, this is

\(^{18}\) Based on SMP Primary Aggregates DPD Policy MA1 annual average provision rate 2009-2026
only sufficient to maintain provision for 3.6 years at the SMP minerals provision rate, or 8 years based on the 2017 sales rate (0.4 mt).

3.1.9 The SMP Primary Aggregates DPD identifies 10 preferred areas for the extraction of concreting aggregate containing an estimated combined resource of 12.72 mt. There has been strong interest from industry in bringing forward some of these preferred areas, four of which have been granted planning permission: 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); and Preferred Area K: Queen Mary Quarry, Ashford (1.25 mt).

3.1.10 It should be noted that Preferred Areas G and J have gained planning consent they remain inactive and therefore do not form part of the aggregate landbank reported at the end of 2017. Together, these two permissions add 2.5 years to the landbank for concreting aggregates based on the SMP Primary Aggregates DPD minerals provision rate of 0.9 mtpa.

3.1.11 Two further applications have been submitted for the production of 3.31 mt of concreting aggregates at preferred areas identified within the SMP and are awaiting determination. These comprise: Preferred Area D, Milton Park Farm, Egham; and Preferred Area L, Watersplash Farm, Halliford. If permitted, these applications would add a further 3.7 years to the landbank for concreting aggregates.

Table 4: New Concreting Aggregate Reserves Needed to Maintain Future Landbank Requirements based on Average Minerals Provision Rate of 0.9 mtpa

<table>
<thead>
<tr>
<th>Year</th>
<th>2018</th>
<th>2020</th>
<th>2022</th>
<th>2024</th>
<th>2026</th>
</tr>
</thead>
<tbody>
<tr>
<td>Reserves at start of year</td>
<td>3.29</td>
<td>1.49</td>
<td>-0.31</td>
<td>-2.11</td>
<td>-3.91</td>
</tr>
<tr>
<td>Additional reserves to maintain 7 year landbank of 6.3 mt</td>
<td>3.01</td>
<td>4.81</td>
<td>6.61</td>
<td>8.41</td>
<td>10.21</td>
</tr>
</tbody>
</table>

3.1.12 Soft sand

3.1.13 The permitted resource position for soft sand is more favourable than for concreting aggregates, although the vast majority of the reserve is located in the east of the county. In August 2014, planning permission was granted for the extraction of 4.1 mt of soft sand at Mercers South Quarry, Nutfield over a period of approximately 16 years. In 2017, another application was submitted and granted planning permission for an extension to the permitted extraction area for a further 250,000 tonnes of soft sand. This resulted in a significant increase in the soft sand landbank in the county. This is the only soft sand site allocated in the adopted SMP Primary Aggregates DPD.

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19 Based on SMP Primary Aggregates DPD Policy MA1 annual average provision rate 2009-2026
3.1.14 Furthermore, planning permission for an extension of time was granted in October 2015 at Alton Road Farnham. This will enable the extraction of 770,000 tonnes of soft sand in the west of the county over a period of approximately 10 years. This adds an additional 1.5 years to the landbank for soft sand.

3.1.15 At the current SMP Primary Aggregates DPD minerals provision rate of 0.5 mtpa for soft sand up until 2026, a reserve of 3.5 mt would be required to maintain a 7 year landbank. With remaining permitted reserves of 7.67 mt at the end of 2017, this is sufficient to maintain provision for 15.4 years at the SMP minerals provision rate, or 19.6 years based on the 2017 sales rate.

3.1.16 Soft sand production will therefore continue to contribute to aggregates supply beyond the plan-period and until at least 2032. Precise amounts will depend on market conditions and the capability of individual workings in production terms, matters over which the MPA has limited control.

| Table 5: New Soft Sand Reserves Needed to Maintain Future Landbank Requirements Based on Average Minerals Provision Rate of 0.5 mtpa<sup>20</sup> |
| --- | --- | --- | --- | --- | --- |
| Year | 2018 | 2020 | 2022 | 2024 | 2026 |
| Reserves at start of year | 7.78 | 6.78 | 5.78 | 4.78 | 3.78 |
| Additional reserves to maintain 7 year landbank of 3.5 mt | -4.67 | -3.67 | -2.67 | -1.67 | -0.67 |

3.2 Recycled and secondary aggregates

3.2.1 The SMP Core Strategy DPD set an ambitious target to supply at least 0.8 mt of recycled and secondary aggregates by 2016 and at least 0.9 mt by 2026. In order to help achieve these targets, the MPA adopted the Aggregates Recycling Joint DPD in 2013 which allocates / identifies 11 sites for aggregates recycling.

3.2.2 The targets reflect the large quantity of construction, demolition and excavation waste managed in Surrey, a significant proportion of which is imported from London and surrounding counties.

3.2.3 Significant progress was made with production of recycled aggregates in Surrey from 2007 to 2017 with yearly increases in sales, reaching 1.15mt in 2017. However, there still remains scope for an increase in production from the development of a permitted 110,000 tpa capacity secondary aggregate production facility at Salfords Depot and it is worth noting that these facilities are mostly temporary, so the yearly sales figure can fluctuate.

<sup>20</sup> Based on SMP Primary Aggregates DPD Policy MA1 annual average provision rate 2009-2026
3.2.4 The 2017 sales figure of 1.15mt exceeds the 2016 target of 0.9 mtpa of recycled aggregate, by 0.25 tpa or approximately 28%. This is largely attributable to five sites (Runfold, Hithermoor, Land West of Queen Mary’s Reservoir, Stanwell and Addlestone) all taking significantly larger tonnages in 2017. It is also worth noting that as annual survey data only captures production from fixed sites, actual production figures will be higher given the volumes of recycled aggregates produced on construction and demolition sites using mobile plant.

Table 6: Recycled Aggregate Sales in Surrey 2007-2016 with targets for 2016 and 2026 (mt)

<table>
<thead>
<tr>
<th>Actual Sales</th>
<th>Target Production</th>
</tr>
</thead>
<tbody>
<tr>
<td>0.25</td>
<td>0.34</td>
</tr>
</tbody>
</table>

3.3 Imports

Land-won sand and gravel

3.3.1 The 2014-15 Aggregate Minerals Survey indicates that Surrey imported 382,000 tonnes of land-won sand and gravel, primarily from Berkshire, and to a lesser extent from Hampshire, Buckinghamshire and West Sussex. In contrast, 380,000 tonnes were exported from Surrey, mostly to Greater London, Berkshire, Hampshire and Kent. Imports into Surrey are all understood to have been imported by rail or road, either directly from quarries or rail depots primarily located just outside the county boundary.

3.3.2 The South East Aggregates Monitoring Report 2014/2015 demonstrates that whilst land-won sand and gravel sales in the South East has fallen by 39% over the previous 10 years from 8.8mt in 2006 to 5.34 mt in 2015, permitted reserves have remained fairly stable, falling by only 7% over the same period from 76.4 mt in 2006 to 70.8 mt in 2015.

3.3.3 Whilst Surrey has a significant imbalance in its reserve in favour of soft sand, the south east as a whole, most notably Buckinghamshire, Hampshire and Oxfordshire, have significant imbalances in favour of sharp sand and gravel. In view of the relatively low quantity of land-won sharp sand and gravel imports into Surrey, imports from the rest of the south east are therefore likely to be able to continue for the foreseeable future. However, this relies upon capacity being available within surrounding authorities. This will be continue to be explored in ongoing Duty to Cooperate discussions, the results of which will be reported on and inform future LAAs.

3.3.4 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; (ii) two current planning applications awaiting determination for the combined extraction of 3.31 mt of sharp sand and gravel on preferred areas identified in the SMP Primary
Aggregates DPD; and (iii) the potential for the remaining preferred areas to come forward.

3.3.5 However, from around 2030 onwards, 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 longer term. This may be imported from a wider catchment given that average haulage distances for aggregates have continued to grow, reaching 30 miles in 2016[21].

3.3.6 As an example, this could potentially extend the export market for Caversham sand and gravel well beyond Reading into east Berkshire, Surrey and West London, and could well substitute for diminishing local supplies in these areas. As a consequence, potential sources of alternative supply are not necessarily limited to those counties adjoining Surrey.

Imports of Marine aggregates

3.3.7 Marine aggregates make an important contribution towards the supply of construction aggregates across the nation, particularly in the South East, London and South Wales. Britain has one of the world’s largest and most developed marine aggregate dredging industries, extracting 15 to 20 mtpa of sand and gravel from the seabed. This is likely to grow to some 29 mtpa in 2030. The majority (around 83%) of marine aggregates landed in England and Wales are used by the building industry[22].

3.3.8 In the South East, marine aggregates contribute as much sand and gravel as that from quarries, and supply one third of all primary aggregates. In London, 50% of all ready mix concrete contains marine aggregate[23].

3.3.9 Seven main regions of the UK hold marine aggregate extraction licenses. London and the South East are supplied by three main regions - the East Coast, Thames Estuary and East English Channel. These three regions have a combined current reserve of 178.39 mt (compared with 128.94 mt in 2013[24]), with average extraction rates over the past 10 years of 9.11 mtpa. This is sufficient to supply London and south east markets for 20.5 years[25].

3.3.10 The East Coast region is the third largest permitted dredging location off the coast of the UK with over 8.5 mt of marine aggregate that could be extracted per year from 12

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licences. In 2016, some 86.5% of the aggregate dredged from the East Coast was landed at wharves in the Thames Estuary. Current estimates suggest that there are 16 years of primary marine aggregate production permitted from the East Coast region.\(^{26}\)

3.3.11 The Thames Estuary region delivers almost all (92\%) of its dredged tonnage to wharves in the Thames Estuary. There are currently 6 licences which permit 2.4 mt of material to be extracted per year, there are 2 application that could, if approved, increase the permitted tonnage by 3.6 million tonnes. Estimates suggest that there are 16 years of permitted primary marine aggregate production remaining.\(^{27}\)

3.3.12 The East English Channel region is the largest dredging region and holds 11 licences, which permit 10.3 mtpa of aggregate to be extracted. Current estimates suggest that there are 23 years of permitted primary marine aggregate production remaining. Current applications in the pipeline could, if approved, increase the permitted tonnage by 2 mtpa. In 2014 some 65.8\% of the aggregate extracted from this region was landed in the Thames Estuary.\(^{28}\)

3.3.13 The South East Aggregates Monitoring Report 2014-2015 explains that in 2014 marine sand and gravel sales at wharves were 6.6mt, an increase on 2013. But in 2015 these reduced to 6.3mt, slightly lower than in 2013, but still higher than the general level of recent years. Marine aggregates provide over 50\% of the sand and gravel supply to the south east region whilst the Medway and Kent wharves supply almost 60\% of the sales. The marine sand and gravel landed at the South East wharves continue to be received from the East Coast, Thames, South Coast and East English Channel licensed dredging areas. The Crown Estate advise there are significant reserves available to the south east.\(^{29}\)

**Imports of Crushed rock**

3.3.14 Surrey imported at least 450,000 tonnes in 2017 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.

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

- Somerset LAA 2014 (the most up-to-date available information), indicates that the landbank for crushed rock at the end of 2015 was approximately 380 million

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\(^{27}\) Marine Aggregates Capability and Portfolio 2017, The Crown Estate, page 18
\(^{29}\) Paragraphs 5.2 and 5.3 of the South East Aggregates Monitoring Report 2014-2015, SEEAWP, July 2016
tonnes. Accordingly, using sub-regional apportionment figures the landbank for crushed rock in Somerset is 28.4 years.

- Gloucestershire LAA 2016 indicates a crushed rock landbank as at 1 January 2017 totaled 24.32mt with the remaining length of this landbank standing at 16.75 years.
- The Derbyshire and Peak District LAA 2016 explains that there is an estimated reserve of rock for aggregate use of over 820mt. This would be sufficient for over 85 years provision based on the current 10 year average figure.
- The Leicestershire LAA 2016 reports estimated permitted reserves of crushed rock at the end of 2013 were around 409 million tonnes. This is sufficient permitted material to last about 30 years.

Imports by rail

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

3.3.17 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 wharves (approximately 50% of total imports to the Woking depot).

3.3.18 In 2014, planning permission was granted at 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 had been inactive for a number of years. The new facility would be able to import up to 100,000 tpa of aggregates from rail-borne imports. This is well in excess of the tonnages handled during the most recent years in which the facility has been active.

3.3.19 Excluding Colnbrook, estimates obtained from operators indicate that the proportion of aggregates imported from surrounding rail depot facilities which are sold in Surrey comprise 40% from Purley, 30% from Crawley, 20% from Tolworth and 10% from Brentford. Imports from these facilities are estimated to be around 450,000 tpa. The proportion imported from Colnbrook is not known but is thought to be low. Figure 6 below shows the location of rail aggregate depots located in Surrey and just beyond the county boundary.

Figure 6: Location of Rail Aggregate Depots in and around Surrey
3.3.20 The 2009 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. Demand for imports of rail-borne aggregate was 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 therefore 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.

30 The 2009 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.
4 Assessment: demand versus supply

4.1 Land-won aggregate from sources within Surrey

4.1.1 Figure 4 shows that sales of land-won sand and gravel increased by 23% between 2013 and 2014 to 0.98 mt and then fell back by some 24% to 0.74 mt in 2015. Sales decreased again in 2016 to 0.73 mt, before picking up in 2017 to 0.79 (8%) which is around 43% below the average annual provision rate of 1.4 mtpa provided for in the adopted SMP, and below the ten year average sales figure of 0.93 mt. The rolling average of the ten year average past sales figure is likely to remain below the minerals provision rate for the foreseeable future. The aggregate landbank decreased to 7.8 years at the end of 2017.

Sharp sand and gravel

4.1.2 Surrey has been a significant source of land-won sharp sand and gravel within the South East for many years but this cannot be sustained indefinitely. Although the landbank at the end of 2017 was just 3.6 years at the SMP minerals provision rate, a further two planning applications on preferred areas identified in the SMP Primary Aggregates DPD are awaiting determination for the extraction of a combined total of 3.31 mt of sharp sand and gravel, one being Milton Park Farm in Egham and the other being Watersplash Farm, Halliford. If permitted, these would add a further 4 years to the sharp sand and gravel landbank in the county. Both applications have been under consideration for a number of years. Recently, both applications are moving forward, with the Watersplash Farm application expected to be reported to the Planning and Regulatory Committee before the end of 2018.

4.1.3 There are sufficient preferred areas identified in the SMP Primary Aggregates DPD to enable a 7 year landbank to be maintained in the short to medium term. Once these sites have come forward and been worked out, opportunities to identify further preferred areas suitable for mineral extraction beyond the end of the plan-period are severely limited as the identified resource becomes increasingly depleted.

4.1.4 The land assessment work undertaken for the current plan\(^\text{31}\) indicated that available resources for concreting aggregates were becoming increasingly difficult to identify. This was because suitably located resources for concreting aggregates from the Lower

\(^{31}\) The evidence base for the SMP Primary Aggregates DPD comprised a thorough assessment of 106 ‘potential mineral zones’ (PMZs) for primary aggregate extraction from which preferred areas were identified for inclusion in the DPD.
Thames valley gravels were approaching exhaustion and there were no viable alternatives within the county to those proposed for inclusion as preferred areas within the SMP Primary Aggregates DPD.

4.1.5 For this reason, the SMP recognises that the resource 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 Report 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”.

Soft sand

4.1.6 The resource position for soft sand is more favourable, as the 2017 landbank figure was 15.4 years. The granting of planning permission for the extraction of 4.1 mt of soft sand at Mercers South, Nutfield in August 2014 increased the landbank for soft sand from 8.7 years to 16.3 years between the end of 2013 and 2015. This is the only preferred area for soft sand identified in the SMP. Furthermore, planning permission was granted in October 2015 to extend the time period for mineral working at Alton Road Sandpit, Farnham following the expiry of planning permission in December 2013. This will enable the extraction of 770,000 tonnes of soft sand adding a further 1.58 years to the landbank for soft sand.

4.1.7 The supply situation will inevitably become tighter towards the end of the plan period. However, in preparing the SMP, it was found that the most accessible sharp sand and gravel and soft sand resources more generally had already been used. Those that remained were becoming more difficult to exploit, either 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.

4.1.8 The SMP Core Strategy DPD includes a presumption against new workings of soft sand within the Area of Outstanding Natural Beauty (AONB) which covers around 25% of the county. This is 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 has the highest status of protection. The SMP Core Strategy DPD also extends this policy position to the Area of Great Landscape Value (AGLV) to safeguard it until such time as a review of the AONB boundary has been completed. This situation will need to be closely monitored.

4.2 Alternative supply options

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Recycled and secondary aggregate

4.2.1 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 annually from 0.25 mt in 2007 to 1.15 mt in 2017 representing an increase of 360% over 9 years.

4.2.2 The MPA has a framework in place to significantly increase recycled and secondary aggregate production in the county to at least 0.8 mtpa by 2016 and 0.9 mtpa by 2026. This follows the adoption of the ARJDPD in 2013. This is partly facilitated by the significant quantities of C,D and E waste, however many of these permissions are temporary. The ARJDPD allocates / identifies specific site allocations for aggregates recycling and also includes a criteria based policy to guide proposals for development on non-allocated / identified sites. Aggregate recycling capacity will be reviewed as part of the Minerals Plan review.

Importing aggregates into Surrey

4.2.3 The availability of some additional rail aggregate depot capacity at Woking and the current proposals to build a modern replacement facility at Salfords Depot provide potential to increase 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 close 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.

4.2.4 An extract from the Aggregate Minerals Survey 2015 demonstrates that between 534,625 and 1,194,625 tonnes of land-won and marine-dredged sand and gravel was imported to within the County the majority of which (between 180,000 and 280,000 tonnes) originated from Greater London (east of). Indications from LAAs being produced by other South East MPAs suggest that the amount of provision being proposed for land-won sand and gravel is significantly lower than that apportioned in the Secretary of State’s Proposed Changes to Policy M3 of the South East Plan (March 2010), which has been revoked. This points towards a likely increasing demand for alternative sources of supply, including marine sand and gravel and recycled and secondary aggregates, as the economy continues its slow recovery from recession.

5 Conclusion

5.1.1 Surrey can report an upward sales trend for sand and gravel, with sales at the end of 2017 reported as 0.79 mt, largely due to new sites coming into production over the course of the reporting year. Sufficient reserves are identified in the SMP to maintain a 7 year land bank in the short to medium term, with the land bank at the end of 2017 being 7.8 years. Whilst the overall sales position is up, it masks the contrast between the sharp sand and gravel and soft sand position.

5.1.2 At the end of 2017, soft sand sales were slightly down. The current supply situation is good, with a healthy 15.4 year land bank. However, much of Surrey’s resource is focused in the east of the county and within the Surrey Hills Area of Outstanding Natural Beauty, restricting future supply options. Inevitably, soft sand supply is likely to become tighter towards the end of the plan period.

5.1.3 Recycled aggregate sales in 2017 were up to 1.15mt, exceeding the 2026 target of at least 0.9 mtpa of recycled aggregate specified in the SMP, by 0.25 tpa or approximately 28%. This increase is largely due to five sites taking significantly larger tonnages in 2017.

5.1.4 Due to commercial confidentially, data cannot be provided on rail aggregate depot sales. Surrey has only one active rail depot in Woking, with a currently inactive depot at Salfords and several depots located just beyond the county boundary. Both Woking and Salfords depots are safeguarded within the SMP. As Surrey will increasingly continue to 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.

5.1.5 In summary, Surrey has chosen to keep the relatively high LAA rate based on the SMP provision to allow capacity for additional growth. The SMP provides sufficient capacity to enable production of land won concreting aggregates 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 combined total is about 40% higher than the current ten year rolling average of past
sales for primary land-won aggregates at 0.85 mt. The current 3 year sales average at 0.75 mt is supplemented by a significant upward trend in recycled aggregates sales and increased imports of marine and land won aggregates and crushed rock. Recent permissions and current planning applications at preferred areas have the potential to significantly increase land won supply but alternative sources will continue to be important. There is no immediate need to review the Minerals Plan, nevertheless we are anticipating beginning the review of the Minerals Plan in 2020 in accordance with the adopted Minerals & Waste Development Scheme. In anticipation of this the LAA rate will also need to be reviewed in 2019.
Annex 1: Sand and gravel reserve sites in Surrey 2017

The following lists include the seven active and inactive sharp sand & gravel workings and the eight active and inactive soft sand workings that contained permitted reserves on 31 December 2017 and contributed towards the landbank in Surrey.

Sharp Sand & Gravel Reserve Sites in Surrey (31 December 2017)

Active

Queen Mary Quarry, Ashford Road, Staines
Addlestone Quarry, Byfleet road, Addlestone

Inactive

Shepperton Quarry, Littleton Lane, Shepperton
Hithermoor Quarry, Leylands Lane, Stanwell Moor
Homers Farm, London Road, Staines
Manor Farm, Ashford Road and Worple Road, Laleham

Soft Sand Reserve Sites in Surrey (31 December 2017)

Active

Moorhouse Sandpits, Westerham Road, Limpfsfield
Reigate Road Quarry, Reigate Road, Betchworth
North Park Quarry, North Park Lane, Godstone
Land North East of Pendell Farm, Pendell Road, Betchingley
Mercers South Quarry, Betchingley Road, Nutfield

Inactive

Alton Road Sandpit, Alton Road, Farnham
Runfold South Quarry (Area C), Guildford Road, Runfold
Homefield Sandpit, Guildford Road, Runfold

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36 Sales comprised sharp sand and gravel or hoggin for construction fill
37 Expected to be active in 2018
38 Majority of reserve allocated for non-aggregate use (silica sand)
39 Majority of reserve allocated for non-aggregate use (silica sand)
40 Active from summer 2017
41 Some limited sand extraction
New Planning Permissions Granted Since 1 January 2017
Mercers South Quarry, Bletchingley Road, Nutfield (Extension) – 250,000 tonnes of soft sand
Annex 2: Aggregate recycling facilities in Surrey 2017

The following list includes the 20 active and inactive fixed aggregate recycling facilities in Surrey in 2017. Temporary facilities are shown in italics.

<table>
<thead>
<tr>
<th>Site Name and Address</th>
<th>Temporary / Permanent</th>
<th>Active / Inactive</th>
</tr>
</thead>
<tbody>
<tr>
<td>1  Weylands Treatment Works, Molsey Road, Walton-on-Thames</td>
<td>Permanent</td>
<td>Active</td>
</tr>
<tr>
<td>2  Sunnyside, Clasford Bridge, Aldershot Road, Worpleston</td>
<td>Permanent</td>
<td>Inactive</td>
</tr>
<tr>
<td>3  20-24 Westfield Road, Slyfield Industrial Estate, Guildford</td>
<td>Permanent</td>
<td>Active</td>
</tr>
<tr>
<td>4  Merrow Highway Depot, Merrow Lane, Guildford</td>
<td>Temporary</td>
<td>Inactive</td>
</tr>
<tr>
<td>5  Reigate Road Materials Recovery Facility, Reigate Road, Betchworth</td>
<td>Permanent</td>
<td>Active</td>
</tr>
<tr>
<td>6  Plough Industrial Estate, Kingston Road, Leatherhead</td>
<td>Permanent</td>
<td>Active</td>
</tr>
<tr>
<td>7  Salfords Rail Depot</td>
<td>Permanent</td>
<td>Inactive</td>
</tr>
<tr>
<td>8  Little Orchard Farm, Reigate Road, Hookwood</td>
<td>Permanent</td>
<td>Active</td>
</tr>
<tr>
<td>9  2 Perrylands Lane, Perrylands Lane, Smallfield</td>
<td>Permanent</td>
<td>Active</td>
</tr>
<tr>
<td>10 Land at Capital House, Woodham Park Road, Woodham</td>
<td>Permanent</td>
<td>Active</td>
</tr>
<tr>
<td>11 Oakleaf Farm, Horton Road, Stanwell Moor</td>
<td>Permanent</td>
<td>Active</td>
</tr>
<tr>
<td>12 Stanwell Quarry, Stanwell Moor Road, Stanwell</td>
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<td>Active</td>
</tr>
<tr>
<td>13 Hithermoor Quarry, Leylands Lane, Stanwell Moor</td>
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<td>Active</td>
</tr>
<tr>
<td>14 Queen Mary Quarry and Land West of Queen Mary Quarry, Ashford Road, Staines</td>
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<td>Active</td>
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<tr>
<td>15 Shepperton Quarry, Littleton Lane, Shepperton</td>
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</tr>
<tr>
<td>16 Normans Corner, Chapel Road, Smallfield</td>
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<tr>
<td>17 Homefield Sandpit, Guildford Road, Runfold</td>
<td>Temporary</td>
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<tr>
<td>18 Runfold South Recycling Centre, Runfold South Quarry, Guildford Road, Runfold</td>
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<tr>
<td>19 Kill Copse, Willinghurst Estate, Guildford Road, Shamley Green</td>
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<td>Active</td>
</tr>
<tr>
<td>20 Addlestone Quarry</td>
<td>Temporary</td>
<td>Active</td>
</tr>
</tbody>
</table>
Annex 3: Rail aggregate depots in and within close proximity to Surrey 2017

The following list includes the active and inactive rail aggregate depots in and within close proximity to Surrey in 2017 that are safeguarded by the Surrey Minerals Plan 2011 (Policy MC6).

**Rail aggregate depots in Surrey:**

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

**Rail aggregate depots within close proximity 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)