



Annual State of the Industry
Aggregates Replenishment (ASIAR) 2018



Aggregates Replenishment – How is the Industry Performing?

Demand for aggregates is set to increase over the next decade supported by major infrastructure projects including HS2, Hinkley Point C, Crossrail 2, Heathrow Runway 3, Road Investment Strategy 2 and government plans to provide 300,000 new homes each year are delivered.

Critical to this delivery is the provision of an adequate source of aggregates across Great Britain from all sources including primary land-won and marine, recycled and secondary. Fundamental to this is the replenishment of primary reserves of sand and gravel and crushed rock to replace those that are already being depleted.

Much has been made of this in recent years to highlight the fact that all parties, from national government, local and regional planning authorities, industry bodies and aggregates producing companies all need to be engaged in a timely and co-ordinated manner to ensure aggregates will be available when and where they are needed.

BDS Marketing Research, the leading consultancy in the aggregates industry and related sectors, is ideally placed to shed light on the current state of the industry with regards to aggregates replenishment. BDS has been monitoring each of the 400+ planning authorities for over two decades to identify activity relating to new applications and decisions on existing schemes for new aggregates reserves. Going back even further, the consultancy has published an annual report “Estimated Reserves of Pits, Quarries and Marine Wharves in Great Britain”. In addition, a separate analysis “Estimated Reserves of Pits and Quarries” is published every three years.

This unique combination of resources has been drawn on to present a new detailed report, “**Annual State of the Industry - Aggregates Replenishment (2018)**” focusing on the level of aggregates that have been consented by planning authorities. Data has been reviewed since 2014 to show replenishment rate trends for the last five years, as well as more detailed analysis of activity for the calendar year, 2018. Replenishment rates by region and nationally, split by sand and gravel and crushed rock (hardstone, limestone and sandstone) are provided along with details of which companies and where the major consents were granted in the last 12 months.

The report will help operating companies, industry observers, investors and other interested parties to gain a clearer picture of replenishment activity and identify opportunities for new activity as well as supporting both operational and strategic activity.

This analysis has never before been carried out across the whole of the aggregates industry in Great Britain. It is the intention that the report will be updated in the first quarter of each year to show how the industry is responding to the key pressure for supply it faces.

Further details of the report are available by contacting Andy Sales at BDS Marketing Research Ltd andy.sales@bdsmarketing.co.uk or 01761 433035.

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