



# Estimated Outputs of Pits & Quarries and Marine Wharves in Great Britain (2019)

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Date: December 2020

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The data provided of which has been obtained and collated from a number of sources including planning records, telephone research with operating companies, industry journals, company and industry websites and existing BDS databases, built up over more than 20 years.

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**Great Britain**

**South East**

**South West**

**West Midlands**

**East Midlands**

**East of England**

**Yorkshire & Humber**

**North West**

**North East**

**Wales**

**Scotland**

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## 1 REPORT OVERVIEW

The report provides BDS estimates of production outputs for all sand and gravel pits, crushed rock quarries and marine wharves in Great Britain in 2019. It updates a similar analysis that we have prepared every year since 1990. It has been published at the same time as similar reports on ready mixed concrete and asphalt.

The estimates relate to aggregates production in thousands of tonnes for the calendar year 2019 at the point of extraction. They include any transfers to on-site added value outlets, scalplings and waste aggregates. The figures do not include any re-sale or merchandising of aggregates from other sources.

We include the extraction of virgin materials for use as aggregates, defined as sand and gravel, limestone, hardstone and sandstone, excluding those materials for non-construction use (e.g. cement).

Marine aggregates figures relate to sales from the wharf, rather than landings. Figures on total marine volumes are based on analysis of the 2019 landings by port statistics published by the Crown Estate and from responses provided by operating companies.

Our research suggests that other published figures may not be 100% accurate in all cases. While we are not suggesting that our information is more accurate, we have not used Government or other published figures where our information would suggest a different total figure for the county. Therefore, a comparison between our data and other statistics needs to be treated with a degree of caution.

We have always had a good response from the industry when discussing our draft figures, which is much appreciated. Whilst a majority of companies contribute, we respect others that do not wish to participate. There are other published sources such as planning applications, and interviews with industry contacts, which provide additional information. In all counties, we will have received responses from a majority of companies.

Any company acquisitions made since the last annual report up to the time of writing (October 2019) have been included under the new ownership for the whole of 2018. Any quarries operated under joint ownership have been split in the regional and national tables according to the shares owned by each of the relevant companies.

The format for the 2019 report has changed from previous years. The new format provides extra depth of information whilst presenting the data in a manner for ease of readability and comparison. Please refer to the explanation in [Section 5 – Data Tables](#).

### 1.1. Background & Purpose

The purpose of the report is to provide a detailed view of the performance of the Pits & Quarries and Marine Wharves in Great Britain. It provides information to individual plant level summarised by company, county, region and nationally and is designed to provide companies with market intelligence to support them in their operational and strategic objectives, whether they are asphalt producers themselves or suppliers of plant, products and services. It is also vital material for industry observers and potential new investors into the industry.

## 1.2. BDS Market Intelligence

BDS is an independent and innovative market research consultancy with over 30 years' experience specialising in minerals, heavy building materials industries and waste sectors. BDS provides marketing intelligence, insight and reports in addition to bespoke consultancy in the following areas: Aggregates, Ready Mixed Concrete, Asphalt, Cement, Concrete Products, Waste Management, and related sectors.

### Intelligent Reports

BDS has a reputable portfolio of publicly available industry reports, amongst these are the BDS annual estimated outputs and market shares for key sectors including aggregates, asphalt, ready mixed concrete, concrete products and cement. Examples of other reports published by BDS include:

- Survey of the aggregates industry in Great Britain
- Analysis of asphalt plants in Great Britain by manufacturer, type, age & size
- Estimated outputs of asphalt plants wharves
- Estimated market shares of ready mixed concrete companies in Great Britain
- Survey of the asphalt industry in Great Britain
- Estimated outputs of concrete block making companies

### Intelligent Planning

BDS monitor planning activity on a range of market sectors and products on a continuous basis across all the planning authorities in Great Britain, Northern Ireland and the Republic of Ireland. This information is made available to clients via the BDS online portal and monthly reports, through an annual subscription. For the aggregates industry, all planning activity relating to developments for minerals is tracked and published to subscribers.

### Intelligent Consultancy

BDS has an extensive list of clients who commission bespoke, independent and industry sectors surveys and studies. These include market size assessment & analysis / prospects for new investments / business & product development / acquisition appraisals / commercial due diligence / company analysis, markets & prices / market-based research.

For further information on any of the above reports or market surveys, please email [enquiries@bdsmarketing.co.uk](mailto:enquiries@bdsmarketing.co.uk) or visit the BDS website at [www.bdsmarketing.co.uk](http://www.bdsmarketing.co.uk)

## Appendix A

### South East

#### A10. Estimated Outputs of Pits & Quarries (2019) – South East - (Companies – Land-won Sand & Gravel)

South East	Land-won Sand & Gravel
Total No. of Sites	xx
Region Volume	xx
Region Market Share	xx

Land-won Sand & Gravel			
Company	No. of Sites*	Volumes (000's tonnes)	Market Share
Company 1	xx	xx	xx
Company 2	xx	xx	xx
Company 3	xx	xx	xx
Company 4	xx	xx	xx
Company 5	xx	xx	xx
Company 6	xx	xx	xx
Company 7	xx	xx	xx
Company 8	xx	xx	xx
Company 9	xx	xx	xx
Company 10	xx	xx	xx
Company 11	xx	xx	xx
Company 12	xx	xx	xx
Company 13	xx	xx	xx
Company 14	xx	xx	xx

**A11. Estimated Outputs of Pits & Quarries (2019) – South East - (Companies & Counties – Land-won Sand & Gravel)**

Company	Berkshire			Buckinghamshire			East Sussex			Hampshire			Isle of Wight		
	No. of Sites	Volumes (000's tonnes)	Market Share	No. of Sites	Volumes (000's tonnes)	Market Share	No. of Sites	Volumes (000's tonnes)	Market Share	No. of Sites	Volumes (000's tonnes)	Market Share	No. of Sites*	Volumes (000's tonnes)	Market Share
Company 1	xx	xx	xx	x	xx	xx	xx	xx	xx	xx	xx	xx	xx	xx	xx
Company 2	xx	xx	xx	x	xx	xx	xx	xx	xx	xx	xx	xx	xx	xx	xx
Company 3	xx	xx	xx	x	xx	xx	xx	xx	xx	xx	xx	xx	xx	xx	xx
Company 4	xx	xx	xx	x	xx	xx	xx	xx	xx	xx	xx	xx	xx	xx	xx
Company 5	xx	xx	xx	x	xx	xx	xx	xx	xx	xx	xx	xx	xx	xx	xx
Company 6	xx	xx	xx	x	xx	xx	xx	xx	xx	xx	xx	xx	xx	xx	xx
Company 7	xx	xx	xx	x	xx	xx	xx	xx	xx	xx	xx	xx	xx	xx	xx
Company 8	xx	xx	xx	x	xx	xx	xx	xx	xx	xx	xx	xx	xx	xx	xx

  

Company	Kent			London			Oxfordshire			Surrey			West Sussex		
	No. of Sites	Volumes (000's tonnes)	Market Share	No. of Sites	Volumes (000's tonnes)	Market Share	No. of Sites	Volumes (000's tonnes)	Market Share	No. of Sites	Volumes (000's tonnes)	Market Share	No. of Sites	Volumes (000's tonnes)	Market Share
Company 1	xx	xx	xx	x	xx	xx	xx	xx	xx	xx	xx	xx	xx	xx	xx
Company 2	xx	xx	xx	x	xx	xx	xx	xx	xx	xx	xx	xx	xx	xx	xx
Company 3	xx	xx	xx	x	xx	xx	xx	xx	xx	xx	xx	xx	xx	xx	xx
Company 4	xx	xx	xx	x	xx	xx	xx	xx	xx	xx	xx	xx	xx	xx	xx
Company 5	xx	xx	xx	x	xx	xx	xx	xx	xx	xx	xx	xx	xx	xx	xx
Company 6	xx	xx	xx	x	xx	xx	xx	xx	xx	xx	xx	xx	xx	xx	xx
Company 7	xx	xx	xx	x	xx	xx	xx	xx	xx	xx	xx	xx	xx	xx	xx
Company 8	xx	xx	xx	x	xx	xx	xx	xx	xx	xx	xx	xx	xx	xx	xx



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