



The Aggregates Replenishment Industry in Great Britain

Annual state of the Industry 2020

2021 (BDS 3rd edition)

BDS Marketing Research (QMJ) Limited
7 Regent Street, Nottingham, NG1 5BS, United Kingdom
Tel: +44 (0) 1761 433035 / www.bdsmarketing.co.uk



The Aggregates Replenishment Industry in Great Britain

Annual state of the Industry 2020

2021 (BDS 3rd edition)

CONTENTS

1 EXECUTIVE SUMMARY	4
2 REPORT OVERVIEW	6
2.1. Background & Purpose	6
2.2. BDS Market Intelligence	7
3 MARKET CLARITY & POSITIONING	8
3.1. Material, Types & Definitions	8
3.2. Industry View & Forward Thinking	8
3.2.1. Mineral Products Association (MPA)	9
3.2.2. UK Mineral Forum (UKMF)	9
3.2.3. British Geological Survey (BGS)	9
3.2.4. Regional Aggregates Working Parties (RAWP)	10
3.3. Influencing Factors	10
3.3.1. Environment	11
3.3.2. Economy	11
3.3.3. Political Position	11
4 MARKET ANALYSIS	12
4.1. Sand & Gravel (Land Won)	12
4.1.1. Estimated Outputs	12
4.1.2. Granted Consents	13
4.1.3. Regional Differences	13
4.2. Sand & Gravel (Marine Won)	16
4.3. Crushed Rock	18
4.3.1. Estimated Outputs	18
4.3.2. Granted Consents	18
4.3.3. Regional Differences	19

4.4.	Key Suppliers & Market Share	21
4.4.1.	Sand & Gravel	23
4.4.2.	Crushed Rock	24
4.5.	Replenishment Rates	26
4.5.1.	Sand & Gravel	26
4.5.2.	Crushed Rock	28
4.6.	Market Locality & Geographical Accessibility	30
5	PLANNING ACTIVITY – TRENDS AND ANALYSIS	32
5.1.	Consented Schemes	32
5.1.1.	Consents vs Average	33
5.1.2.	Consents vs Tonnage	33
5.1.3.	Market Share vs Tonnage	34
5.1.4.	Consents vs Time	35
6	FUTURE INDUSTRY PROSPECTS & DEVELOPMENT OPPORTUNITIES	38
6.1.	Aggregate substitution	38
6.2.	UK Market & Economy	38

Appendices

Appendix A – Information Sources	41
Appendix B - Data Charts	42

FURTHER INFORMATION

The 'Aggregate Replenishment Industry in Great Britain – Annual state of the Industry 2020' prepared and produced by BDS provides a review and analysis on the state of replenishment rates in the aggregates industry for the last seven years in Great Britain.

The highly valued report will help operating companies, industry observers, investors and other interested parties gain a clearer picture of recent aggregate replenishment activity within Great Britain with a particular focus on the latest annual movements. The report focuses on providing key data to support the operational and strategic activity of industry, it identifies areas of opportunities for new activity and provides thought and consideration for the future of aggregate replenishment.

To find out more about the 'Aggregate Replenishment Industry in Great Britain - Annual state of the Industry' 2020 Report or to purchase a copy of the report

- please contact:
 - o Andy Sales: andy.sales@bdsmarketing.co.uk
 - o Rachel Brooks: Rachel.Brooks@bdsmarketing.co.uk
- or visit: <https://www.bdsmarketing.co.uk/aggregates>

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.

The 'Aggregate Replenishment Industry in Great Britain – Annual state of the Industry 2020' report forms part of the BDS suite of 'Sector Specific Industry Reports'; other reports within the suite include:

- The Aggregates Industry of Great Britain
- The Asphalt Industry of Great Britain
- The Cement Industry of Great Britain
- The Ready-Mix Concrete Industry of Great Britain
- The Brick Industry of Great Britain

Examples of further reports published by BDS include:

- Estimated reserves of pits and quarries in Great Britain
- Outputs and market shares of Great Britain aggregates companies
- Estimated outputs of aggregates moved through rail depots
- Directory of aggregates Plants in Great Britain
- Estimated outputs of packed products plants in Great Britain

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 or visit the BDS website at www.bdsmarketing.co.uk



MARKET INTELLIGENCE

BDS Marketing Research (QMJ) Limited
7 Regent Street, Nottingham, NG1 5BS, United Kingdom
Tel: +44 (0) 1761 433035 / www.bdsmarketing.co.uk