

Latest report on Aggregates Reserves confirms worrying decline

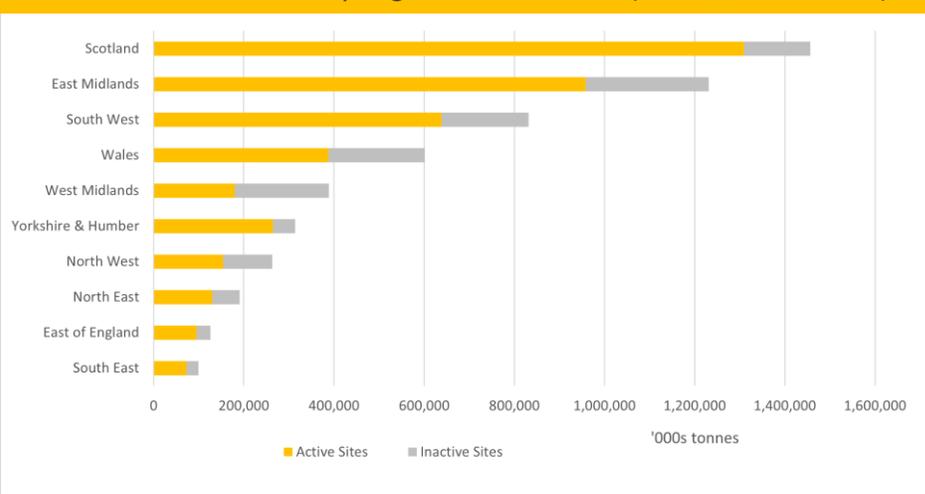
The latest edition of the “Estimated Reserves of Pits & Quarries in Great Britain” report has been published by BDS Market Intelligence and shows that the remaining life of consented aggregates reserves has fallen by 20% in the last five years. This is an alarming situation considering the concerns the industry already has over the replenishment of essential materials through the planning process.

More than 5.5 billion tonnes of reserves of sand & gravel and crushed rock (hardstone, limestone and sandstone) have been identified in 925 separate active and inactive sites operated by almost 300 individual companies, as at the end of 2021. The report provides details of the reserves and estimated years life at every site, summarized at county, region and national level and by company including market shares.

Over 30% of the currently operating sites have consented reserves that are expected to be exhausted before the end of 2026 based on BDS estimates of recent outputs, while 20 counties will be exhausted of sand & gravel reserves within 10 years. Four complete regions will have no remaining sand & gravel reserves at the end of the same period.

The overall life of reserves used for aggregates purposes are estimated to be 31 years in total, split by 12 years for sand & gravel and 39 years for crushed rock. There is significant regional disparity on where the reserves are located in relation to actual need. For example, Scotland holds 27% of the total reserves for Great Britain yet accounted for less than 8% of construction new orders in 2021. In contrast, the South East has less than 2% of national reserves but accounted for 33% of new orders for the same period.

Estimated GB Reserves by Region and Site Status (Active / Inactive Site)



Other findings in the report show that 75% of the reserves are concentrated in just four regions – South West, East Midlands, Wales and Scotland. The top five aggregates producers – Aggregate Industries, Breedon, CEMEX, Hanson and Tarmac – hold a combined market share of 78% of the total reserves in Great Britain.

The report provides essential intelligence for operating companies, potential new entrants to the market, planning authorities and other industry observers. For further details or to purchase a copy of the report please contact BDS by email at contact@bdsmarketing.co.uk or call 01761 433035.

