

Estimated Movement of Aggregates to Rail Depots (2022) in Great Britain 2023



For more information contact:

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

VAT Reg. No. 244432327
Registered in England No. 10208753

Sample Report



No part of this report may be reproduced, stored in a retrieval system in any form or by any means, electric, mechanical, photocopying, recording or otherwise, without prior written permission of BDS Marketing Research (QMJ) Limited, except for use within the company subscribing to the report.

Every possible precaution has been taken to ensure that the information in this report is accurate at the time of going to press. BDS Marketing Research (QMJ) Limited cannot accept responsibility for any loss or damage, including consequential loss, arising from this report.

The data provided has been obtained and collated from a number of sources; these could include but are not limited to planning records, primary research with operating companies, industry journals, newsfeeds, company and industry websites and existing BDS databases, built up over more than 30 years.

Version Control
Sample Report

CONTENTS

1 EXECUTIVE SUMMARY

2 REPORT OVERVIEW

- 2.1. Background & Purpose
- 2.2. BDS Market Intelligence

3 RAIL DEPOT GB MARKET ANALYSIS

- 3.1. Market Overview
- 3.2. Plant & Company Activity (last 12 months)
 - 3.2.1. Joint Ventures
 - 3.2.2. Ceased Operation
 - 3.2.3. New Operations
 - 3.2.4. Company Activity

- 3.3. Planning Activity 2023

4 MARKET SHARE ANALYSIS

5 SECTOR MARKET PROSPECTS

- 5.1. Government Support
- 5.2. Operator collaboration and workings

6 DATA TABLES

Appendices

- Appendix A. Data tables to provide Estimated Movement of Aggregates to Rail Depots in Great Britain

1 EXECUTIVE SUMMARY

The report “Estimated Movement of Aggregates to Rail Depots in Great Britain” provides BDS estimates of outputs of aggregate movements through Rail Depots in Great Britain in 2022.

- In 2022, BDS estimate there were 84 rail depots operational in Great Britain estimated to have received ~21.4 million tonnes of aggregates. This figure represents ~12.1% of the total estimated land-won aggregates produced in the year.
- One region (South East) accounted for the importation of ~45% of all rail moved aggregates in 2022. A further ~41% of the overall market share was combined between East of England, Yorkshire & the Humber, North West.
- Sixteen aggregates companies were involved in the movement of rail-borne primary aggregates in Great Britain in 2022. During this time Tarmac operated the highest number of rail depots (26) and transported an estimated ~7 million tonnes of aggregates throughout Great Britain.

2 REPORT OVERVIEW

The first publication of the BDS Estimated Movements of Aggregates to rail depots in Great Britain report was in 2015. The current report provides BDS estimates of movements of aggregates by rail in Great Britain in 2022. The estimates relate to aggregates movement in thousands of tonnes for the calendar year 2022. The figures do not include any re-sale or merchandising of aggregates from other sources.

2.1. Background & Purpose

The purpose of the report is to provide a detailed view of the movements of aggregates by rail in Great Britain in 2022. It provides information on an individual site 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. It is also vital material for industry observers and potential new investors into the industry.

2.2. 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](#)
- [Estimated Outputs of Pits, Quarries and Wharves in Great Britain](#)
- [Estimated Reserves of Pits and Quarries in Great Britain](#)
- [Analysis of Asphalt Plants in Great Britain by Manufacturer, Type, Age & Size](#)
- [Estimated Outputs of Asphalt Plants in Great Britain](#)
- [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.

APPENDIX A

Data tables to provide Estimated Movements of Aggregates by Rail Depots in Great Britain

Great Britain	6
A1. Estimated Movement of Aggregates to Rail Depots (2022) – Great Britain	6
A2. Estimated Movements of Aggregates to Rail Depots (2022) – Great Britain (Regions)	6
A3. Estimated Movement of Aggregates to Rail Depots (2022) – Great Britain (Company)	6
South East	7
A4. Estimated Movement of Aggregates to Rail Depots (2022) – South East (Regions)	7
A5. Estimated Movement of Aggregates to Rail Depots (2022) – South East (Company)	7
A6. Estimated Movements of Aggregates to Rail Depots (2022) – South East - (Companies & Counties)	8
A7. Estimated Movements of Aggregates to Rail Depots (2022) – South East (Sites)	9
South West	10
A8. Estimated Movement of Aggregates to Rail Depots (2022) – South West (Regions)	10
A9. Estimated Movement of Aggregates to Rail Depots (2022) – South West (Company)	10
A10. Estimated Movements of Aggregates to Rail Depots (2022) – South West - (Companies & Counties)	11
A11. Estimated Movements of Aggregates to Rail Depots (2022) – South West (Sites)	12
West Midlands	13
A12. Estimated Movement of Aggregates to Rail Depots (2022) – West Midlands (Regions)	13
A13. Estimated Movement of Aggregates to Rail Depots (2022) – West Midlands (Company)	13
A14. Estimated Movements of Aggregates to Rail Depots (2022) – West Midlands - (Companies & Counties)	14
A15. Estimated Movements of Aggregates to Rail Depots (2022) – West Midlands (Sites)	14
East Midlands	15
A16. Estimated Movement of Aggregates to Rail Depots (2022) – East Midlands (Regions)	15
A17. Estimated Movement of Aggregates to Rail Depots (2022) – East Midlands (Company)	15
A18. Estimated Movements of Aggregates to Rail Depots (2022) – East Midlands - (Companies & Counties)	16
A19. Estimated Movements of Aggregates to Rail Depots (2022) – East Midlands (Sites)	16
East of England	17
A20. Estimated Movement of Aggregates to Rail Depots (2022) – East of England (Regions)	17
A21. Estimated Movement of Aggregates to Rail Depots (2022) – East of England (Company)	17
A22. Estimated Movements of Aggregates to Rail Depots (2022) – East of England - (Companies & Counties)	18
A23. Estimated Movements of Aggregates to Rail Depots (2022) – East of England (Sites)	19
Yorkshire & The Humber	20
A24. Estimated Movement of Aggregates to Rail Depots (2022) – Yorkshire & The Humber (Regions)	20
A25. Estimated Movement of Aggregates to Rail Depots (2022) – Yorkshire & The Humber (Company)	20
A26. Estimated Movements of Aggregates to Rail Depots (2022) – Yorkshire & The Humber - (Companies & Counties)	21
A27. Estimated Movements of Aggregates to Rail Depots (2022) – Yorkshire & The Humber (Sites)	21
North West	22
A28. Estimated Movement of Aggregates to Rail Depots (2022) – North West (Regions)	22
A29. Estimated Movement of Aggregates to Rail Depots (2022) – North West (Company)	22
A30. Estimated Movements of Aggregates to Rail Depots (2022) – North West - (Companies & Counties)	23
A31. Estimated Movements of Aggregates to Rail Depots (2022) – North West (Sites)	23
Wales	24
A32. Estimated Movement of Aggregates to Rail Depots (2022) – Wales (Regions)	24
A33. Estimated Movement of Aggregates to Rail Depots (2022) – Wales (Company)	24
A34. Estimated Movements of Aggregates to Rail Depots (2022) – Wales - (Companies & Counties)	25
A35. Estimated Movements of Aggregates to Rail Depots (2022) – Wales (Sites)	25
Scotland	26
A36. Estimated Movement of Aggregates to Rail Depots (2022) – Scotland (Regions)	26
A37. Estimated Movement of Aggregates to Rail Depots (2022) – Scotland (Company)	26
A38. Estimated Movements of Aggregates to Rail Depots (2022) – Scotland - (Companies & Counties)	27
A39. Estimated Movements of Aggregates to Rail Depots (2022) – Scotland (Sites)	27

South East

Region	No. of Sites	Volumes (000's tonnes)	Market Share
South East			

A4. Estimated Movement of Aggregates to Rail Depots (2022) – South East (Regions)

Region	No. of Sites	Volumes (000's tonnes)	Market Share
Berkshire			
Buckinghamshire			
East Sussex			
Hampshire			
Isle of Wight			
Kent			
London			
Oxfordshire			
Surrey			
West Sussex			

A5. Estimated Movement of Aggregates to Rail Depots (2022) – South East (Company)

Company	No. of Sites	Volume (000's tonnes)	Market Share

A7. Estimated Movements of Aggregates to Rail Depots (2022) – South East (Sites)

Company	Site Name	Aggregates to rail depots	
		Volumes (000's tonnes)	Market Share
Berkshire			
Buckinghamshire			
East Sussex			
Hampshire			
Isle of Wight			
Kent			
London			
Oxfordshire			
Surrey			
West Sussex			