

Estimated Annual Outputs (2022) of Aggregate Sites 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	3
2 REPORT OVERVIEW	4
2.1. Background & Purpose	5
2.2. BDS Market Intelligence	5
3 AGGREGATES GB MARKET ANALYSIS	6
3.1. Market Overview	6
3.2. Plant & Company Activity (last 12 months)	9
3.2.1. Joint Ventures	9
3.2.2. Ceased Operation	9
3.2.3. New Operations	9
3.2.4. Other Activity	11
3.3. Planning Activity (2023)	11
4 MARKET SHARE ANALYSIS	12
4.1. Land-won Sand & Gravel	15
4.2. Marine-won Sand & Gravel	16
4.3. Crushed Rock	17
4.4. Regional Analysis of Aggregates Outputs	18
5 AGGREGATES MARKET FORECAST 2022-2025	19
6 DATA TABLES	21

Appendices

- Appendix A. Analysis of Aggregates Sites by Region
Appendix B. Data tables to provide Estimated Outputs of Aggregate Sites in Great Britain

1 EXECUTIVE SUMMARY

The report “Estimated Annual Outputs (2022) of Aggregate Sites in Great Britain Report” provides BDS estimates of outputs of operating pits & quarries and marine wharves in Great Britain up to 31st December 2022.

- In 2022, BDS estimate the outputs of pits, quarries and marine wharves in Great Britain to be ~177 million tonnes. Crushed rock contributed a share of 66% with the remainder divided between land-won sand & gravel (26%) and marine won sand & gravel (8%).
- The aggregates sector in Great Britain continues to be dominated by five major companies: Aggregate Industries, Breedon, CEMEX, Hanson and Tarmac (the ‘majors’). In 2022, the ‘majors’ jointly accounted for ~71% of the total aggregates market. The largest producer of aggregates in Great Britain in 2022 was identified as Tarmac (20.0%).
- In 2022, the East Midlands held the first regional position for all aggregates in Great Britain. By aggregate type, East of England was the largest producer for land won sand & gravel, South East for marine won sand & gravel and East Midlands for crushed rock in Great Britain.

2 REPORT OVERVIEW

BDS has published the Estimated Outputs of Aggregate Sites in Great Britain report annually for over 30 years. The report provides BDS estimates of production outputs for all sand and gravel pits, crushed rock quarries and marine wharves in Great Britain in 2022. It updates a similar analysis that BDS have prepared every year since 1990. It has been published at the same time as similar reports on ready mixed concrete, and asphalt, rail depots and building products.

2.1. 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. 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 Reserves of Pits & Quarries in Great Britain](#)
- [Estimated market shares of ready mixed concrete companies in Great Britain](#)
- [Estimated outputs of Asphalt Plants in Great Britain](#)
- [Estimated outputs of concrete block making companies](#)
- [Analysis of Aggregates Replenishment 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.

APPENDIX B

APPENDIX B – Set of data tables to provide estimated outputs of Pits, Quarries and Marine Wharves (2022) – By Great Britain Countries, Regions, Counties & Companies

Great Britain

B1. Estimated Outputs of Pits & Quarries (2022) – Great Britain	4
B2. Estimated Outputs of Pits & Quarries (2022) – Great Britain (Regions)	4
B3. Estimated Outputs of Pits & Quarries (2022) – Great Britain (Companies – Condensed)	5
B4. Estimated Outputs of Pits & Quarries (2022) – Great Britain (Companies – Land-won Sand & Gravel)	6
B5. Estimated Outputs of Pits & Quarries (2022) – Great Britain (Companies – Marine-won Sand & Gravel)	9
B6. Estimated Outputs of Pits & Quarries (2022) – Great Britain (Companies – Crushed Rock)	10

South East

B7. Estimated Outputs of Pits & Quarries (2022) – South East	13
B8. Estimated Outputs of Pits & Quarries (2022) – South East (Regions)	13
B9. Estimated Outputs of Pits & Quarries (2022) – South East (Companies)	14
B10. Estimated Outputs of Pits & Quarries (2022) – South East - (Companies – Land-won Sand & Gravel)	16
B11. Estimated Outputs of Pits & Quarries (2022) – South East - (Companies & Counties – Land-won Sand & Gravel)	12
B12. Estimated Outputs of Pits & Quarries (2022) – South East – (Companies – Marine-won Sand & Gravel)	16
B13. Estimated Outputs of Pits & Quarries (2022) – South East – (Companies & Counties – Marine-won Sand & Gravel)	17
B14. Estimated Outputs of Pits & Quarries (2022) – South East – (Companies - Crushed Rock)	18
B15. Estimated Outputs of Pits & Quarries (2022) – South East – (Companies & Counties - Crushed Rock)	19
B16. Estimated Outputs of Pits & Quarries (2022) – South East (Sites)	20

South West

B17. Estimated Outputs of Pits & Quarries (2022) – South West	24
B18. Estimated Outputs of Pits & Quarries (2022) – South West (Regions)	24
B19. Estimated Outputs of Pits & Quarries (2022) – South West (Companies)	25
B20. Estimated Outputs of Pits & Quarries (2022) – South West - (Companies – Land-won Sand & Gravel)	26
B21. Estimated Outputs of Pits & Quarries (2022) – South West - (Companies & Counties – Land-won Sand & Gravel)	27
B22. Estimated Outputs of Pits & Quarries (2022) – South West – (Companies – Marine-won Sand & Gravel)	28
B23. Estimated Outputs of Pits & Quarries (2022) – South West – (Companies & Counties – Marine-won Sand & Gravel)	29
B24. Estimated Outputs of Pits & Quarries (2022) – South West – (Companies - Crushed Rock)	30
B25. Estimated Outputs of Pits & Quarries (2022) – South West – (Companies & Counties - Crushed Rock)	31
B26. Estimated Outputs of Pits & Quarries (2022) – South West (Sites)	33

West Midlands

B27. Estimated Outputs of Pits & Quarries (2022) – West Midlands	36
B28. Estimated Outputs of Pits & Quarries (2022) – West Midlands (Regions)	36
B29. Estimated Outputs of Pits & Quarries (2022) – West Midlands (Companies)	37
B30. Estimated Outputs of Pits & Quarries (2022) – West Midlands - (Companies – Land-won Sand & Gravel)	38
B31. Estimated Outputs of Pits & Quarries (2022) – West Midlands - (Companies & Counties – Land-won Sand & Gravel)	39
B32. Estimated Outputs of Pits & Quarries (2022) – West Midlands – (Companies - Crushed Rock)	40
B33. Estimated Outputs of Pits & Quarries (2022) – West Midlands – (Companies & Counties - Crushed Rock)	41
B34. Estimated Outputs of Pits & Quarries (2022) – West Midlands (Sites)	42

East Midlands

B35. Estimated Outputs of Pits & Quarries (2022) – East Midlands	44
B36. Estimated Outputs of Pits & Quarries (2022) – East Midlands (Regions)	44
B37. Estimated Outputs of Pits & Quarries (2022) – East Midlands (Companies)	45
B38. Estimated Outputs of Pits & Quarries (2022) – East Midlands - (Companies – Land-won Sand & Gravel)	46
B39. Estimated Outputs of Pits & Quarries (2022) – East Midlands - (Companies & Counties – Land-won Sand & Gravel)	47
B40. Estimated Outputs of Pits & Quarries (2022) – East Midlands – (Companies - Crushed Rock)	48
B41. Estimated Outputs of Pits & Quarries (2022) – East Midlands – (Companies & Counties - Crushed Rock)	49
B42. Estimated Outputs of Pits & Quarries (2022) – East Midlands (Sites)	50

East of England

B43. Estimated Outputs of Pits & Quarries (2022) – East of England	53
B44. Estimated Outputs of Pits & Quarries (2022) – East of England (Regions)	53
B45. Estimated Outputs of Pits & Quarries (2022) – East of England (Companies)	54
B46. Estimated Outputs of Pits & Quarries (2022) – East of England - (Companies – Land-won Sand & Gravel)	56
B47. Estimated Outputs of Pits & Quarries (2022) – East of England - (Companies & Counties – Land-won Sand & Gravel)	57

B48. Estimated Outputs of Pits & Quarries (2022) – East of England – (Companies – Marine-won Sand & Gravel).....	60
B49. Estimated Outputs of Pits & Quarries (2022) – East of England – (Companies & Counties – Marine-won Sand & Gravel)	61
B50. Estimated Outputs of Pits & Quarries (2022) – East of England – (Companies - Crushed Rock)	62
B51. Estimated Outputs of Pits & Quarries (2022) – East of England – (Companies & Counties - Crushed Rock)	62
B52. Estimated Outputs of Pits & Quarries (2022) – East of England (Sites)	63
Yorkshire & The Humber	
B53. Estimated Outputs of Pits & Quarries (2022) – Yorkshire & The Humber	66
B54. Estimated Outputs of Pits & Quarries (2022) – Yorkshire & The Humber (Regions)	66
B55. Estimated Outputs of Pits & Quarries (2022) – Yorkshire & The Humber (Companies).....	67
B56. Estimated Outputs of Pits & Quarries (2022) – Yorkshire & The Humber - (Companies – Land-won Sand & Gravel)	68
B57. Estimated Outputs of Pits & Quarries (2022) – Yorkshire & The Humber - (Companies & Counties – Land-won Sand & Gravel)	69
B58. Estimated Outputs of Pits & Quarries (2022) – Yorkshire & The Humber – (Companies – Marine-won Sand & Gravel).....	70
B59. Estimated Outputs of Pits & Quarries (2022) – Yorkshire & The Humber – (Companies & Counties – Marine-won Sand & Gravel)	70
B60. Estimated Outputs of Pits & Quarries (2022) – Yorkshire & The Humber – (Companies - Crushed Rock)	71
B61. Estimated Outputs of Pits & Quarries (2022) – Yorkshire & The Humber – (Companies & Counties - Crushed Rock).....	72
B62. Estimated Outputs of Pits & Quarries (2022) – Yorkshire & The Humber (Sites)	73
North West	
B63. Estimated Outputs of Pits & Quarries (2022) – North West.....	76
B64. Estimated Outputs of Pits & Quarries (2022) – North West (Regions).....	76
B65. Estimated Outputs of Pits & Quarries (2022) – North West (Companies).....	77
B66. Estimated Outputs of Pits & Quarries (2022) – North West - (Companies – Land-won Sand & Gravel)	78
B67. Estimated Outputs of Pits & Quarries (2022) – North West - (Companies & Counties – Land-won Sand & Gravel).....	79
B68. Estimated Outputs of Pits & Quarries (2022) – North West – (Companies – Marine-won Sand & Gravel).....	80
B69. Estimated Outputs of Pits & Quarries (2022) – North West – (Companies & Counties – Marine-won Sand & Gravel)	80
B70. Estimated Outputs of Pits & Quarries (2022) – North West – (Companies - Crushed Rock)	81
B71. Estimated Outputs of Pits & Quarries (2022) – North West – (Companies & Counties - Crushed Rock)	82
B72. Estimated Outputs of Pits & Quarries (2022) – North West (Sites).....	83
North East	
B73. Estimated Outputs of Pits & Quarries (2022) – North East	85
B74. Estimated Outputs of Pits & Quarries (2022) – North East (Regions)	85
B75. Estimated Outputs of Pits & Quarries (2022) – North East (Companies)	86
B76. Estimated Outputs of Pits & Quarries (2022) – North East - (Companies – Land-won Sand & Gravel)	87
B77. Estimated Outputs of Pits & Quarries (2022) – North East - (Companies & Counties – Land-won Sand & Gravel)	87
B78. Estimated Outputs of Pits & Quarries (2022) – North East – (Companies – Marine-won Sand & Gravel)	88
B79. Estimated Outputs of Pits & Quarries (2022) – North East – (Companies & Counties – Marine-won Sand & Gravel).....	88
B80. Estimated Outputs of Pits & Quarries (2022) – North East – (Companies - Crushed Rock).....	89
B81. Estimated Outputs of Pits & Quarries (2022) – North East – (Companies & Counties - Crushed Rock)	90
B82. Estimated Outputs of Pits & Quarries (2022) – North East (Sites)	91
Wales	
B83. Estimated Outputs of Pits & Quarries (2022) – Wales	93
B84. Estimated Outputs of Pits & Quarries (2022) – Wales (Regions).....	93
B85. Estimated Outputs of Pits & Quarries (2022) – Wales (Companies)	94
B86. Estimated Outputs of Pits & Quarries (2022) – Wales - (Companies – Land-won Sand & Gravel)	95
B87. Estimated Outputs of Pits & Quarries (2022) – Wales - (Companies & Counties – Land-won Sand & Gravel)	96
B88. Estimated Outputs of Pits & Quarries (2022) – Wales – (Companies – Marine-won Sand & Gravel)	97
B89. Estimated Outputs of Pits & Quarries (2022) – Wales – (Companies & Counties – Marine-won Sand & Gravel)	98
B90. Estimated Outputs of Pits & Quarries (2022) – Wales – (Companies - Crushed Rock).....	99
B91. Estimated Outputs of Pits & Quarries (2022) – Wales – (Companies & Counties - Crushed Rock)	100
B92. Estimated Outputs of Pits & Quarries (2022) – Wales (Sites).....	102
Scotland	
B93. Estimated Outputs of Pits & Quarries (2022) – Scotland	105
B94. Estimated Outputs of Pits & Quarries (2022) – Scotland (Regions).....	105
B95. Estimated Outputs of Pits & Quarries (2022) – Scotland (Companies)	106
B96. Estimated Outputs of Pits & Quarries (2022) – Scotland - (Companies – Land-won Sand & Gravel)	109
B97. Estimated Outputs of Pits & Quarries (2022) – Scotland - (Companies & Counties – Land-won Sand & Gravel)	110
B98. Estimated Outputs of Pits & Quarries (2022) – Scotland – (Companies - Crushed Rock).....	114
B99. Estimated Outputs of Pits & Quarries (2022) – Scotland – (Companies & Counties - Crushed Rock)	117
B100. Estimated Outputs of Pits & Quarries (2022) – Scotland (Sites).....	123

Great Britain

B1. Estimated Outputs of Pits & Quarries (2022) – Great Britain

Great Britain		Land-won Sand & Gravel	Marine-won Sand & Gravel	Crushed Rock			
				Crushed Rock	Hardstone	Limestone	Sandstone
Total No. of Sites							
Region Volume							
Region Market Share							

B2. Estimated Outputs of Pits & Quarries (2022) – Great Britain (Regions)

Region	No. of Sites	Volumes (000's tonnes)	Market Share	Land-won Sand & Gravel			Marine-won Sand & Gravel			Crushed Rock		
				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
South East												
South West												
West Midlands												
East Midlands												
East of England												
Yorkshire & Humber												
North West												
North East												
Wales												
Scotland												

B3. Estimated Outputs of Pits & Quarries (2022) – Great Britain (Companies – Condensed)

Company	No. of Sites*	Volumes (000's tonnes)	Market Share	Land-won Sand & Gravel			Marine-won Sand & Gravel			Crushed Rock		
				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

South East

B4. Estimated Outputs of Pits & Quarries (2022) – South East

South East	Land-won Sand & Gravel	Marine-won Sand & Gravel	Crushed Rock			
			Crushed Rock	Hardstone	Limestone	Sandstone
Total No. of Sites						
Region Volume						
Region Market Share						

B5. Estimated Outputs of Pits & Quarries (2022) – South East (Regions)

County	No. of Sites	Volumes (000's tonnes)	Market Share	Land-won Sand & Gravel			Marine-won Sand & Gravel			Crushed Rock		
				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
Berkshire												
Buckinghamshire												
East Sussex												
Hampshire												
Isle of Wight												
Kent												
London												
Oxfordshire												
Surrey												
West Sussex												

B6. Estimated Outputs of Pits & Quarries (2022) – South East (Companies)

Company	No. of Sites*	Volumes (000's tonnes)	Market Share	Land-won Sand & Gravel			Marine-won Sand & Gravel			Crushed Rock		
				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

B7. Estimated Outputs of Pits & Quarries (2022) – South East - (Companies – Land-won Sand & Gravel)

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

Land-won Sand & Gravel			
Company	No. of Sites*	Volumes (000's tonnes)	Market Share

Land-won Sand & Gravel			
Company	No. of Sites*	Volumes (000's tonnes)	Market Share

B8. Estimated Outputs of Pits & Quarries (2022) – 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	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

B9. Estimated Outputs of Pits & Quarries (2022) – South East – (Companies – Marine-won Sand & Gravel)

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

Marine-won Sand & Gravel			
Company	No. of Sites	Volumes (000's tonnes)	Market Share

B10. Estimated Outputs of Pits & Quarries (2022) – South East – (Companies & Counties – Marine-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	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

B11. Estimated Outputs of Pits & Quarries (2022) – South East – (Companies - Crushed Rock)

South East	Crushed Rock	Crushed Rock		
		Hardstone	Limestone	Sandstone
Total No. of Sites				
Region Volume				
Region Market Share				

Crushed Rock			
Company	No. of Sites	Volumes (000's tonnes)	Market Share

Hardstone		
No. of Sites	Volumes (000's tonnes)	Market Share

Limestone		
No. of Sites	Volumes (000's tonnes)	Market Share

Sandstone		
No. of Sites	Volumes (000's tonnes)	Market Share

B12. Estimated Outputs of Pits & Quarries (2022) – South East – (Companies & Counties - Crushed Rock)

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	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

B13. Estimated Outputs of Pits & Quarries (2022) – South East (Sites)

Company	Site Name	Land-won Sand & Gravel		Marine-won Sand & Gravel		Crushed Rock		
		Volumes (000's tonnes)	Market Share	Volumes (000's tonnes)	Market Share	Type	Volumes (000's tonnes)	Market Share
Berkshire								
Buckinghamshire								
East Sussex								
Hampshire								
Isle of Wight								
Kent								
London								
Oxfordshire								
Surrey								
West Sussex								