

Estimated Annual Outputs (2022) of Aggregate Sites in Great Britain 2023



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Sample Report



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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



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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 landwon 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

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Great Britain

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

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

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

		Volumes		Land-	won Sand &	Gravel	Marine	-won Sand &	k Gravel	(Crushed Rock	C
Region	No. of Sites	(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
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)

		Volumes			Land-w	on Sand & G	Gravel	Marine-	won Sand &	Gravel		С	rushed Rock	
Company	No. of Sites*	(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
				-										
				-										
				·										
				 I [1			
		5	C		2		6							
						Page B5							November	2023



South East

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

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

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

				1	Land-	won Sand &	Gravel	Marine	-won Sand 8	& Gravel	I	(rushed Rock	(
County	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
Berkshire														
Buckinghamshire														
East Sussex											Ī			
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 No. of Sites* Volumes (000's tonnes) Image: State of Sites Image: State of Sites Image: State of Sites Image: State of Sites Image: State of Sites Image: State of Sites Image: State of Sites Image: State of Sites Image: State of Sites Image: State of Sites Image: State of Sites Image: State of Sites Image: State of Sites Image: State of Sites Image: State of Sites Image: State of Sites Image: State of Sites Image: State of Sites Image: State of Sites Image: State of Sites Image: State of Sites Image: State of Sites Image: State of Sites Image: State of Sites Image: State of Sites Image: State of Sites Image: State of Sites Image: State of Sites Image: State of Sites Image: State of Sites Image: State of Sites Image: State of Sites Image: State of Sites Image: State of Sites Image: State of Sites Image: State of Sites Image: State of Sites Image: State of State of Sites Image: State of State of Sites Image: State of State	Market Share	No. of Sites	Volumes (000's tonnes)	Market Share		No. of Sites	Crushed Roc Volumes (000's tonnes)	Market Share
					_			
					_			
					_			
					_			
					-			
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					-			
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					_			
	_		-		_			
					-			



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 Sar	nd & Gravel			ĺ
Company	No. of Sites*	Volumes (000's tonnes)	Market Share	

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

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B8. Estimated Outputs of Pits & Quarries (2022) – South East - (Companies & Counties – Land-won Sand & Gravel)

		Berkshire		F	Buckinghamshi	re	Γ		East Sussex		1		Hampshire			Isle of W	'ight	
Company	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	Volum	es Ma	arket hare
							-											
							_											
							_											
		Kent			London				Oxfordshi	re			Surrey			West	Sussex	
Company	No. of Sites*	Volumes (000's tonnes)	Market Share	No. o Sites		Share		No. of Sites	Volumes (000's tonnes)	Marke		No. of Sites	Volumes (000's	Market	No. Site	00) ^{to}		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)

		Berkshire		Buckinghamshire						East Sussex		1		Hampshire		Isle of Wight				
Company	No. of Sites	Volumes (000's tonnes)	Market Share	No. o Site	of [\]	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 Sit	. of	Volumes (000's tonnes)	Market Share	
								_				_								
										5]								
Company	No. of Sites*	Kent Volumes (000's tonnes)	Market Share		o. of tes	London Volumes (000's tonnes)	Market Share		No. of Sites	Oxfordshi Volumes (000's tonnes)			No. of Sites	Surrey Volumes (000's tonnes)			lo. of Sites	West Susse Volumes (000's tonnes)	Market	
								_												
			C																	



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

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

Cru	ished Rock					Hardstone			Limestone		Sandstone		
Company	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
				1									
]									



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

															. —			
		Berkshire		B	uckinghamshi	re			East Sussex	1	ļ		Hampshire	2		Isle of Wight		
Company	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
	-																	
											J							
		Kent			London				Oxfordshire]		Surrey				West Sussex	
Company	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)	Marke Share
		tonnesj			tonnes)				tonnesj				tonnes)				tonnes)	
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B13. Estimated Outputs of Pits & Quarries (2022) – South East (Sites)

			n Sand & avel	1	Marine-we			Crus	hed Rock	
Company	Site Name	Volumes (000's tonnes)	Market Share		Volumes (000's tonnes)	Market Share		Туре	Volumes (000's tonnes)	Market Share
Berkshire										
							-			
Buckinghamshire										
East Sussex										
							\vdash			
Hampshire										
Isle of Wight							-			
							_			
Kent							_			
London										
				-			_			
Oxfordshire										
Surrey										
Surrey										
West Sussex										
				_			L			