

Nottinghamshire and Nottingham Local Aggregate Assessment

CONTAINING 2024 SALES DATA

PUBLISHED DECEMBER 2025



Langford RSPB Reserve, taken by Tarmac and RSPB (2024)



**Nottinghamshire
County Council**



**Nottingham
City Council**

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Summary

The Nottinghamshire and Nottingham Local Aggregates Assessment (LAA) is a document produced under the requirements set out in the National Planning Policy Framework (NPPF) and covers the geographical area of Nottinghamshire, including the Nottingham City unitary authority area. It monitors annual sales data for aggregate minerals as well as identifying other relevant local information to enable the Mineral Planning Authorities to plan for a steady and adequate supply of minerals.

Aggregate minerals in Nottinghamshire are made up of sand and gravel, Sherwood Sandstone and crushed rock and are used in the construction industry. Their main uses include concrete, mortar, asphalt, railway ballast and bulk fill. Whilst aggregate mineral resources are present in the Nottingham City area, the opportunities to work these minerals are limited. As a result the majority of aggregates consumed in the City are supplied from either Nottinghamshire or further afield.

The LAA sets out:

- Summaries of past aggregate sales, number of active quarries and the distribution of the extracted mineral.
- The latest 10-year and 3-year average sales data and a comparison to the previous average sales data.
- The key issues that could affect the future demand for aggregates over the next plan period.

This LAA details the annual sales data for 2024.

Key Findings

Nottinghamshire is an important producer of sand and gravel and Sherwood Sandstone and has a large export market, particularly to South Yorkshire and the wider East Midlands. Crushed rock production is currently at zero with most imported from Derbyshire and Leicestershire.

Sales of aggregate minerals has continued to fluctuate, remaining lower than pre-recession years. The COVID – 19 pandemic saw sales drop sharply in 2020 due to the impact of lockdowns and whilst sales recovered the following years, flooding in the Trent Valley in 2023 and 2024 has resulted in sand and gravel sales fall again.

Sherwood Sandstone sales however have continued to increase following 2020, reaching a peak of 0.64 million tonnes in 2024.

The peak in Sherwood Sandstone sales in 2024 has meant the 3 – year average sales has increased, with the 10 – year average remaining relatively stable. For sand and gravel both the 10 – year and 3 – year average sales figures have decreased over the years. The landbank for sand and gravel and Sherwood sandstone has decreased slightly in 2024 compared to 2023 as reserves have been worked and there have not been new permissions granted in this time period to add to the landbank. Both however remain above the minimum 7 – year landbank NPPF requirement. Table 1 summarises the key figures for both aggregates.

Table 1 also shows that crushed rock sale in Nottinghamshire has continued to be dormant, with permitted reserves remaining at 3.34 million tonnes. Due to the lack of crushed rock production, a landbank has not been calculated as this would give an unrealistic figure.

Considering the latest sales figures, future provision and growth in Nottinghamshire and Nottingham, it is concluded that the demand forecast set out in the adopted Minerals Local Plan does not need to be reviewed at this time, this will continue to be monitored with the statutory 5 – year Plan review undertaken by March 2026.

Table 1: Sales and landbank figures as of December 2024

Aggregate	Sales in 2024 (million tonnes)	Change in sales from previous year	10-year sales average (million tonnes)	3-year sales average (million tonnes)	Sales Trend (10 years)	LAA annual provision rate (million tonnes)	Permitted reserves at 31 December 2024 (million tonnes)	Change in permitted reserves from previous year	Landbank (years)	Change in Landbank from previous years
Land won Sand and Gravel	0.89	↑ by 0.02mt	1.24	1.03	↓ By 0.05mt	1.24	19.19	↓ By 1.47mt	15.47	↓ By 0.55 years
Sherwood Sandstone	0.64	↑ By 0.41mt	0.33	0.35	↑ By 0.50mt	0.33	6.33	↓ By 0.37mt	19.18	↓ By 4.15 years
Crushed Rock	0.00	→ At 0	0.00	0.00	→ At 0	0.00	3.34	→ At 3.34	N/A	N/A
Total Primary Aggregates	1.53	↑ By 0.43mt	1.57	1.38	↓ By 0.01mt					

1. Introduction

- 1.1. The requirement to prepare a Local Aggregate Assessment (LAA) was introduced in the National Planning Policy Framework (NPPF) in March 2012 and is a continued requirement within the latest 2024 version of the NPPF (paragraph 226). The NPPF states that the LAA should forecast future demand based on the latest 10 years average sales data and other relevant local information, and an assessment of all supply options, including secondary and recycled sources. The data contained in the LAA will then enable the Minerals Planning Authorities (MPAs) to make provision for a steady and adequate supply of aggregate minerals in their area over the life of the Minerals Local Plan.
- 1.2. The Planning Practice Guidance also sets out an additional requirement to identify the 3- year average sales figure, in particular to identify the general trend of demand as part of the consideration of whether it might be appropriate to increase supply.
- 1.3. This LAA sets out the aggregate minerals found in the geographical area of Nottinghamshire including Nottingham City, the current situation in terms of annual sales, the number of active quarries and the amount of aggregate that will need to be provided over the plan period. Consideration is then given to future aggregate provision and future growth to help forecast future demand.
- 1.4. It is important to note that whilst aggregate mineral resources are present in the Nottingham City boundary, the opportunities to work these minerals are limited due to the built-up nature of the area. As a result, the majority of aggregates consumed in the City are supplied from either Nottinghamshire or further afield.
- 1.5. The Nottingham City Land and Planning Policies document contains policies against which any proposal for minerals development within the city boundary would be assessed against, including a Minerals Safeguarding Policy, however it does not include demand forecasts for aggregate minerals.

- 1.6. The information used in this LAA is based upon information retrieved from the 2024 Aggregate Monitoring (AM) survey returns relating to the period 1st of January to 31st of December 2024.
- 1.7. The LAA is informed by consultation with the East Midlands Aggregate Working Party. The Aggregates Working Party is made up of MPAs from across the region and industry representatives. Its role is to provide technical advice about the supply and demand for aggregates, and it usually undertakes annual monitoring of aggregate production and levels of permitted reserves across the East Midlands. This information is then supplied to MPAs and to the National Aggregate Co-ordinating Group to inform national aggregate provision.
- 1.8. The LAA is required to be updated on an annual basis and will enable the County and City Councils to monitor ongoing patterns and trends in aggregate sales and ensure that adequate reserves are maintained over the plan period.

2. Aggregates in Nottinghamshire and Nottingham City

- 2.1. Aggregates account for around 90% of minerals used in construction and are essential in maintaining the physical framework of buildings and infrastructure on which our society depends. Aggregates are usually defined as hard granular materials and include sand and gravel, Sherwood Sandstone and limestone. Their main uses include concrete, mortar, Roadstone, asphalt, railway ballast, drainage courses and bulk fill. Alternative aggregates are also used within Nottinghamshire, which include secondary and recycled materials.

Primary Aggregates

- 2.2. Plan 1 illustrates the following primary aggregates that are found in the geographical area of Nottinghamshire and Nottingham.

Sand and gravel

- 2.3. Important alluvial (river) sand and gravel deposits are found in the Trent and the Idle Valleys which have made Nottinghamshire an important producer of sand and gravel in the East Midlands. Limited extraction also occurs in glaciofluvial sand and gravel deposits near East Leake, south of Nottingham. Sand and gravel is mainly used in ready mixed concrete production, although Nottinghamshire's reserves are particularly valuable because they meet high strength concrete specifications as the gravel is made up of quartzite.

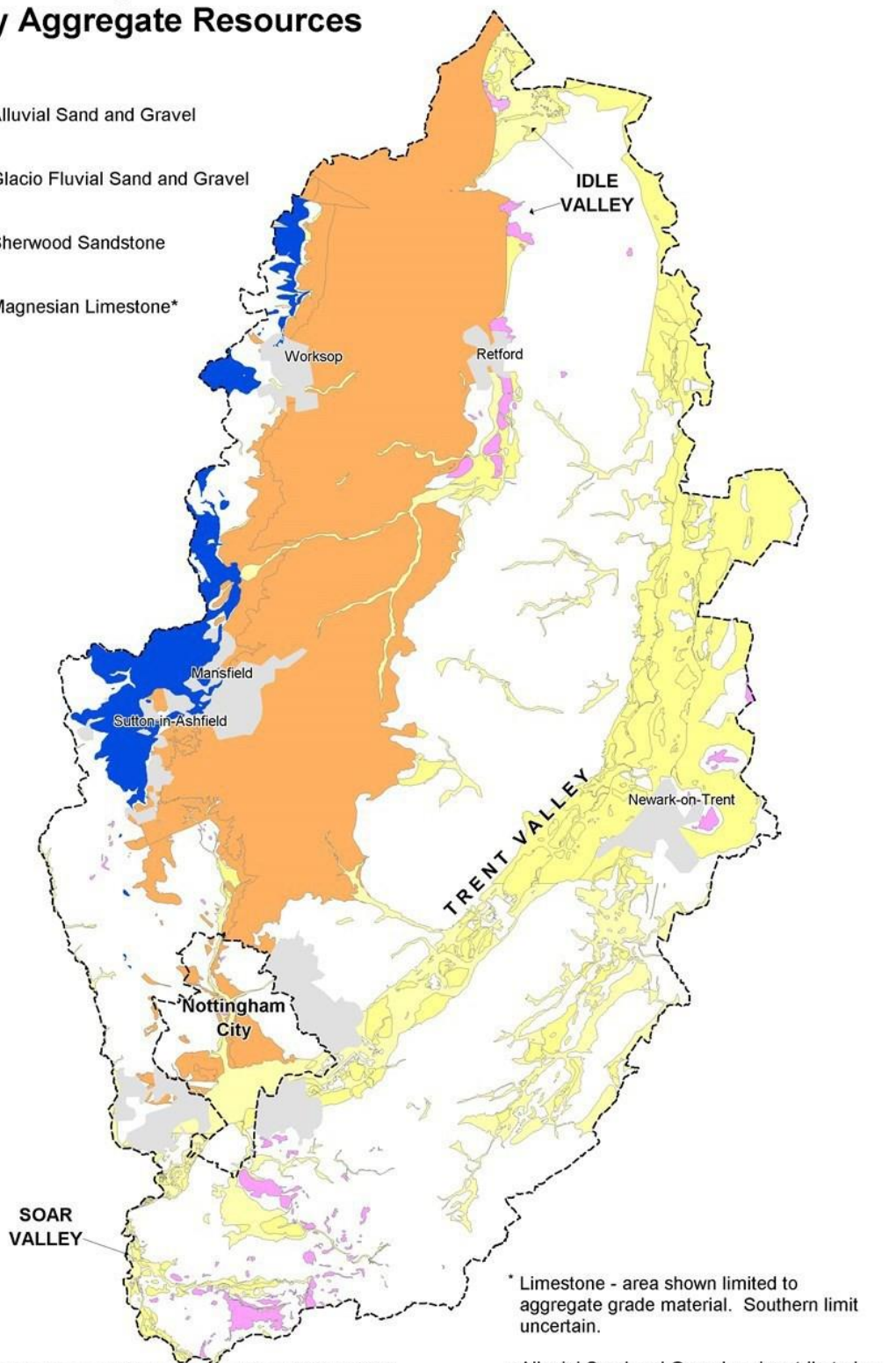
Sherwood Sandstone

- 2.4. Although defined as sandstone, this rock formation rapidly breaks down to sand when extracted. The sandstone occurs as a broad north-south belt stretching from the border with South Yorkshire, southwards to Nottingham. The mineral is mainly used to produce asphalt and mortar sand. There is relatively little overlap with the uses for which alluvial and glacial sand and gravels are suitable. Sherwood Sandstone is also used for non- aggregate industrial and other specialist end-uses.

Plan 1 - Nottinghamshire - Primary Aggregate Resources

Key

- Alluvial Sand and Gravel
- Glacio Fluvial Sand and Gravel
- Sherwood Sandstone
- Magnesian Limestone*



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 British Geological Survey, 2013. Digital Geological Map of Great Britain 1:625 000 scale (DiGMapGB-625)
 Superficial Deposits data [CD-Rom] Version 1.10. Keyworth, Nottingham: British Geological Survey.
 Release date 30-04-2003

* Alluvial Sand and Gravel - minor tributaries
 and glaciofluvial - economic potential limited.

Magnesian Limestone

- 2.5. This resource occurs as a relatively narrow belt to the west of the Sherwood Sandstone. This outcrop comprises the southernmost limits of the UK's second largest limestone resource that extends from the Durham coast through Yorkshire into Derbyshire and Nottinghamshire. Limestone suitable for use as an aggregate is only found in the Mansfield area and to the north where the mineral is used mainly as a road sub-base material, although some mineral is of industrial grade quality. Production is relatively small scale and the lowest in the East Midlands. Around Linby the limestone is suitable for building and ornamental purposes, although aggregates can be produced as a by-product of utilising reject building stone.

Alternative Aggregates

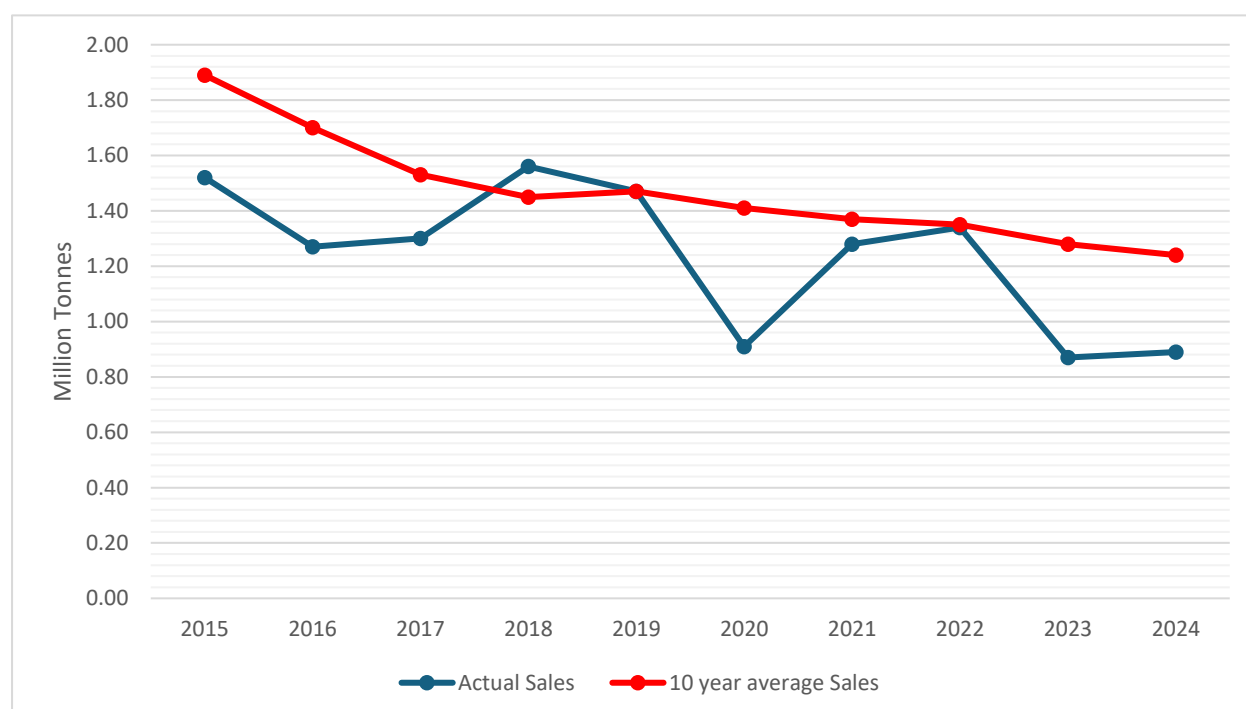
- 2.6. Alternative aggregates comprise secondary and recycled materials, although these terms are often used interchangeably. Recycled aggregates are materials that have been used previously and include some types of construction and demolition waste, asphalt road planings and used railway ballast. Secondary aggregates are by-products of other processes that have not been previously used as aggregates. They include colliery spoil, power station ashes, blast furnace and steel slag, incinerator ashes and foundry sands.
- 2.7. Alternative aggregates are currently most widely used in lower grade applications such as bulk fill. However, the range of uses is widening due to advances in technology and the increasing economic incentive to use them instead of primary aggregates.
- 2.8. In Nottinghamshire, sources of alternative aggregates include construction and demolition waste, power station ash, river dredgings, road planings and rail ballast.

3. Local Production

Sand and Gravel

- 3.1. As shown in Figure 1, sales of sand and gravel have fluctuated over the past ten years, reaching a peak in 2018 before falling sharply in 2020 due to the impact of the COVID – 19 Pandemic. Whilst sales started to recover in 2021 and 2022, sales in 2023 and 2024 fell to a low of 0.87 million tonnes. This was caused by unprecedented flooding in the Trent Valley in the autumn of 2023 and the early months of 2024, particularly by Storm Babet and Henk, as well as slow growth in construction activity. When sites are flooded only stockpiles can be worked and it can take some time to pump out the flood water and undertake the appropriate checks before operations can recommence. The [MPA Regional overview of construction and mineral products markets in Great Britain \(2024 edition\)](#) also forecasted a decline in construction supply chain in 2024 due to cost inflation and uncertainty in the economy and planning system, hindering then confidence in the sector and so project delivery. The combination of the two meant that whilst sales in 2024 did increase slightly, by 2%, compared to 2023, sales decreased by 34% compared to 2022.
- 3.2. The decline in sand and gravel sales is then reflected in the 10 – year sales average, which has been slowly declining each year as previous years higher sale figures fallout. The 10 – year sales average in 2024 was 1.24 million tonnes compared to the 1.89 million tonnes average in 2015. The 2024 10 – year sales average also reflects the impact of the flooding and pandemic events, which if removed result in an average of 1.39 million tonnes.

Figure 1 : Sales of sand and gravel between 2015 – 2024 against the 10 – year average sales figure.



Year	2015	2016	2017	2018	2019	2020	2021	2022	2023	2024
Sales (Million tonnes)	1.52	1.27	1.30	1.56	1.47	0.91	1.28	1.34	0.87	0.89

Resources and landbank

- 3.3. The landbank is calculated by dividing existing permitted reserves by the average sales over the last 10 years. This is in line with guidance set out in the National Planning Practice Guidance (NPPG).
- 3.4. Permitted reserves currently total 19.19 million tonnes, the eight permitted sand and gravel quarries that contribute to this are listed in Table 2. Due to the confidentiality and the sensitive nature of this data, the reserve figure for each site has not been published. As indicated in Table 2, two sites are inactive and it should also be noted that Girton is at minimal activity, working only stockpiles. However, these sites are included within the permitted reserves to calculate the landbank as per paragraph 083 of the NPPG. For

Sturton Le Steeple, extraction is expected to commence in 2026 with the operator taking active steps to commence work, therefore future reports will reflect this activity.

- 3.5. Taking the permitted reserves of 19.19 million tonnes and the 10- year sales average of 1.24 million tonnes per annum, the landbank as of December 2024 stood at 15.47 years. This is above the minimum 7-year landbank requirement set out in the NPPF, though as noted in the NPPG (paragraph 084) this is a minimum requirement, with there being no maximum limit to the landbank.
- 3.6. The sites listed in Table 2 together have the potential production capacity of 1.5 million tonnes per annum (based on the latest public information provided for each site at the time of publication).

Table 2: Permitted sand and gravel quarries in Nottinghamshire

Site	Operator	Status	Planning Permission End Date	Potential Production Capacity (tonnes)	Source of Potential Production Capacity
Langford	TARMAC	Active	23/09/2028	400,000	3/24/02067/CMA
Besthorpe	TARMAC	Active	21/11/2037	200,000	3/19/01929/CMM
Girton	TARMAC	Inactive	31/12/2035	200,000	3/16/01341/CMM
Cromwell	CEMEX	Active	18/05/2028	300,000	3/22/01790/CMA
East Leake	CEMEX	Active	19/10/2029	180,000	8/21/00728/CMA
Sturton le Steeple	HOLCIM	Inactive	31/12/2035	100,000	Minerals Local Plan
Misson Bawtry Road	MISSION SAND AND GRAVEL	Active	04/03/2031	80,000	1/24/00410/CDM
Scrooby Quarry	RSG (Rotherham Sand & Gravel)	Inactive	31/12/2028	40,000	1/23/01346/CDM
		TOTAL		1,500,000	

Geographical spread of sand and gravel quarries

- 3.7. Historically a geographical spread of sand and gravel quarries has developed across Nottinghamshire, resulting in three geographic areas. This has occurred due to the location of sand and gravel reserves along the Trent and Idle Valley but also due to where key markets are within Nottinghamshire and

neighbouring authorities. Due to the sensitivity of publishing site specific reserve data, Table 3 below shows the spread of reserves over the Idle Valley and Trent Valley, as there is only East Leake quarry operational in the Nottingham area the Council is unable to provide a breakdown by the three areas.

- 3.8. Whilst this shows the current geographic spread of permitted quarries, it is important to note that over time, as reserves are worked and additional reserves are granted planning permission, this spread will change.

Table 3: Location of permitted quarries in Nottinghamshire

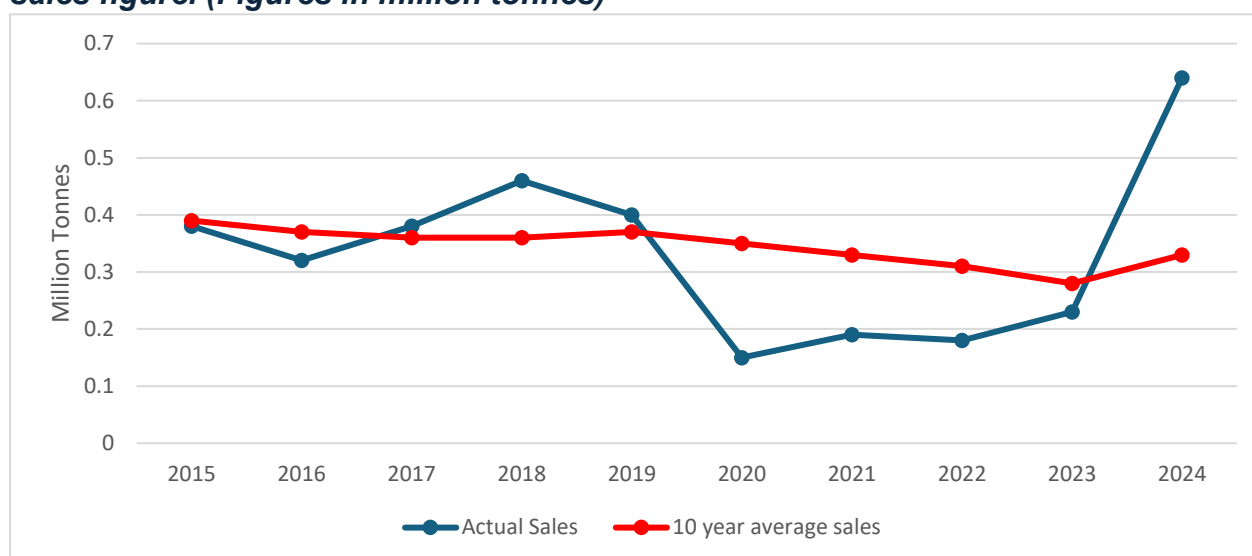
Geographic Area	Total tonnage in the area (million tonnes)					Percentage of total reserves				
	2020	2021	2022	2023	2024	2020	2021	2022	2023	2024
Idle Valley	7.59*	8.75*	8.34*	8.67*	8.52*	42%	41%	41%	42%	45%
Trent Valley	12.63	12.74	12.17	11.98	10.57	58%	59%	59%	58%	55%

*7.4 million tonnes of these reserves is contained in the inactive Sturton Le Steeple quarry

Sherwood Sandstone

- 3.9. As shown in Figure 2 Sherwood Sandstone sales have historically been lower than sand and gravel sales, reflecting its use in more specialised markets. After remaining relatively stable between 2015 and 2019, sales dropped significantly to 0.15 million tonnes in 2020 due to the COVID – 19 Pandemic. Sales showed a gradual recovery between 2021 and 2023 but in 2024 there was 64% increase in sales from 2023 to 0.64 million tonnes, a high that was last seen in 2003. This can be attributed to permissions granted at one of the sites which enabled an increase in their production which increased overall sales.

Figure 2: Sales of Sherwood Sandstone, 2015 – 2024 against 10-year average sales figure. (Figures in million tonnes)



Year	2015	2016	2017	2018	2019	2020	2021	2022	2023	2024
Sales (million tonnes)	0.38	0.32	0.38	0.46	0.40	0.15	0.19	0.18	0.23	0.64

Resources and landbank

- 3.10. There are four permitted Sherwood Sandstone quarries in Nottinghamshire, with one of these currently inactive (see Table 4 below). It should be noted that Two Oaks Farm is included within this provision as whilst, in policy terms, it is a non-aggregate site which produces specialised industrial sand for a specialised market, a proportion of the permitted reserves does produce aggregate. Therefore, Two Oaks is included within Table 4 below and the specialist sand reserves are excluded from the permitted reserves. Please note that due to the sensitivity of data relating to site specific reserves, this information has not been published. The total permitted aggregate reserves across the four sites totals 6.33 million tonnes.
- 3.11. With average sales over the last 10 years standing at 0.33 million tonnes and the permitted reserves at 6.33 million tonnes, this means as of December 2024 the landbank stood at 19.18 years. This is above the minimum 7-year requirement.

3.12. The sites listed in Table 4 have a combined potential production capacity of 725,000 tonnes per annum (based on public information provided in the latest planning application documents for each site at the time of publication).

Table 4: Permitted Sherwood Sandstone quarries in Nottinghamshire

Site	Operator	Status	Planning Permission End Date	Potential Production Capacity (tonnes)	Source of Potential Production Capacity
Burntstump	TARMAC	Active	07/01/2042	30,000	7/2022/0752NCC
Bestwood 2	TARMAC	Active	31/12/2028	125,000	7/2017/1504NCC
Two Oaks Farm	Mansfield Sand Company	Active	13/10/2064	450,000	4/V/2021/0397
Scrooby Top*	RSG (Rotherham Sand & Gravel)	Inactive	31/05/2035	120,000	Minerals Local Plan
TOTAL				725,000	



Aerial drone image of Scrooby quarry taken by County Council in April 2024.

Imports and exports of sand and gravel (including Sherwood Sandstone)

- 3.13. Imports and exports of aggregates have only been recorded as a one-year snapshot generally every four years through the National Survey of Aggregate Movements undertaken by the British Geological Survey. The surveys do not include a breakdown for Sherwood Sandstone; hence all sand and gravel import and export figures include Sherwood Sandstone. Import sales data is much more limited and is calculated using the median percentage range as supplied in the National Survey of Aggregates Movement.
- 3.14. The following data is based on the latest survey undertaken in 2023, with the collation report published by the British Geological survey in August 2025. Table 5 below shows the distribution of sand and gravel from Nottinghamshire to other regions. It shows how half of the sand and gravel that originated in Nottinghamshire was consumed in Nottinghamshire whilst the remaining half was exported outside the County, with 33% going to other areas within the East Midlands.

Table 5: Sale of sand and gravel from Nottinghamshire to principal destination by sub region

Destination	Land won sand and gravel (000 tonnes)	Mineral Planning Authority %
Nottinghamshire	568	50%
East Midlands	382	33%
Elsewhere	180	16%
Unallocated	17	1%
MPA total	1146	

From Table 9e of the Collation of the results of the 2023 Aggregate Minerals Survey for England and Wales

- 3.15. Table 6 provides further detail of which mineral planning authorities consumed the sand and gravel sourced in Nottinghamshire, for both the 2019 and 2023 survey. It shows that Leicestershire and Rutland continue to be the main authorities in the East Midlands where sand and gravel is exported to. Outside

the East Midlands, Yorkshire and Humber was the largest consumer, with South Yorkshire the main authority resources were exported to in this region. Between 2019 and 2023 these exports have declined, reflecting the depletion of resources and closure of sites in the Idle Valley, such as Finningley, that were located closest to South Yorkshire.

Table 6: Consumption of sand and gravel from Nottinghamshire used for aggregate by mineral planning authorities

Destination MPA	2019 Survey	2023 Survey
East of England Region		
Bedfordshire (Central, Bedfordshire and Luton)	<1%	
Cambridgeshire and Peterborough	1 – 10%	<1%
Essex, Southend-on-Sea and Thurrock		<1%
East Midlands Region		
Derbyshire and Peak District	1 – 10%	1 – 10%
Leicestershire and Rutland	10 – 20%	20 – 30%
Lincolnshire	1 – 10%	<1%
Northamptonshire	<1%	1 – 10%
Nottinghamshire	40 – 50%	60 – 70%
East Midlands unknown		30 – 40%
North East Region		
Tyne and Wear		<1%
North West Region		
Cheshire (Cheshire West and Chester, and Cheshire East)		<1%
Greater Manchester, Merseyside, Halton & Warrington	<1%	10 – 20%
Scotland		
Scotland	<1%	
South East Region		
Hampshire and the Isle of Wight	<1%	
Kent		<1%
West Berkshire	<1%	<1%
South West Region		
West of England (Avon)	<1%	
North Wales Region		
North East Wales	<1%	<1%
South Wales Region		
South East Wales	<1%	

Destination MPA	2019 Survey	2023 Survey
West Midlands Region		
Shropshire and Telford and Wrekin		1 – 10%
Staffordshire	<1%	<1%
Warwickshire	1 – 10%	<1%
Remainder of West Midlands	<1%	<1%
Yorks and the Humber Region		
Humber (East Riding, North Lincs and NE Lincs)	1 – 10%	<1%
North Yorkshire, Yorkshire Dales and North York Moors	1 – 10%	<1%
South Yorkshire	50 – 60%	10 -20%
West Yorkshire	1 – 10%	<1%
Yorks and the Humber Unknown	20 – 30%	20 – 30%
Unknown destination	10 – 20%	1 – 10%

3.16. In terms of imports of sand and gravel into Nottinghamshire for consumption as aggregates, Table 7 shows a similar picture in that aggregates predominantly were imported from East Midlands mineral planning authorities. In both 2019 and 2023, following Nottinghamshire, the second largest source of sand and gravel consumed in Nottinghamshire was sourced from Lincolnshire, with other sources including Derbyshire, Staffordshire and Peterborough.



Aerial drone image of Ratcher Hill quarry by County Council officers in May 2023.

Table 7: Sand and gravel consumed in Nottinghamshire supplied by mineral planning authorities

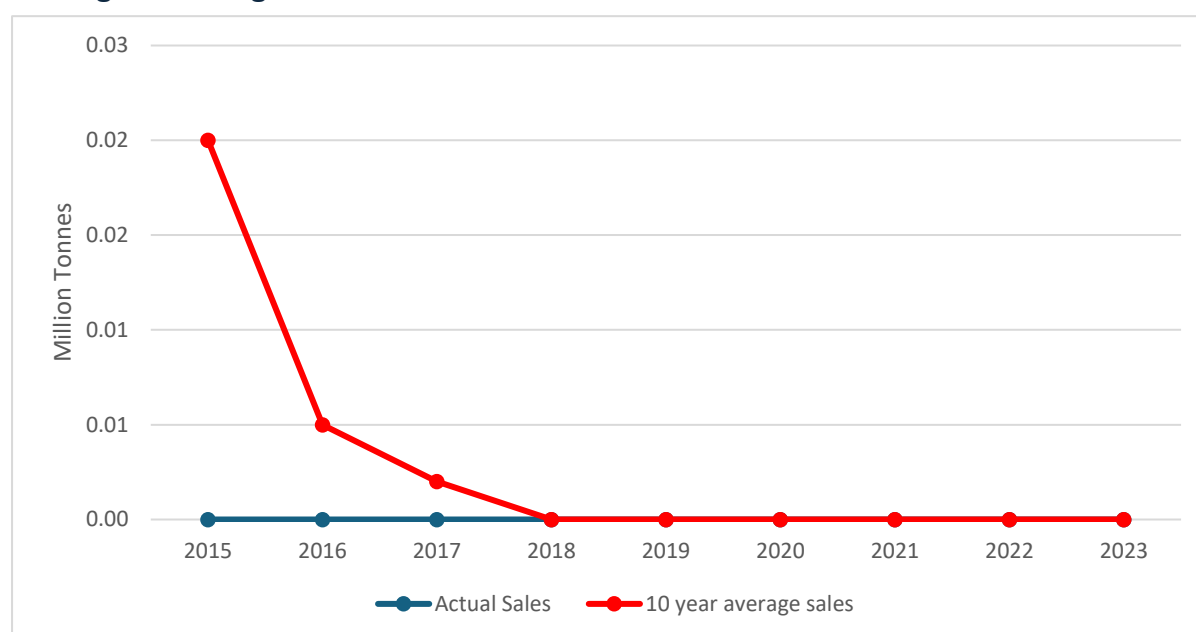
Source MPA	2019 Survey	2023 Survey
East of England Region		
Cambridgeshire	<1%	<1%
Central Bedfordshire		<1%
Peterborough	1 – 10%	1 – 10%
East Midlands Region		
Derbyshire and Peak District	1 – 10%	1 – 10%
Leicestershire	1 – 10%	<1%
Lincolnshire	20 – 30%	20 – 30%
Nottinghamshire	40 – 50%	60 – 70%
North East Region		
Durham	1 – 10%	
North West Region		
Cumbria	<1%	
West Midlands Region		
Staffordshire	1 -10%	1 – 10%
Yorkshire and Humber		
Doncaster	<1%	
East Riding	<1%	

- 3.17. Both Tables 6 and 7 show that sand and gravel resources predominantly travel regionally, with smaller volumes moving further afield. Ultimately the market determines how far it will travel.
- 3.18. Overall, the survey concludes that Nottinghamshire imported 346,000 tonnes of sand and gravel and exported 579,000 tonnes, meaning that Nottinghamshire continues to be a net exporter of sand and gravel.

Crushed Rock (including aggregate limestone)

- 3.19. Crushed rock sales (predominately aggregate limestone) in Nottinghamshire have stood at zero over the past 10-years period as shown in Figure 3 below. This is due to the permitted crushed rock quarry at Nether Langwith remaining mothballed since 2007, becoming largely a training site.

Figure 3: Sales of aggregate limestone between 2015 – 2024 against 10 – year average sales figure



Year	2015	2016	2017	2018	2019	2020	2021	2022	2023	2024
Sales (million tonnes)	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00

Resources and landbank

- 3.20. Nottinghamshire only has one dedicated aggregate limestone quarry which was originally opened to supplement a much larger quarry in Derbyshire; however, it has been mothballed since 2007. The quarry has permission to extract limestone until 2035, with a potential production capacity of 250,000 tonnes per annum.

- 3.21. Some aggregate is also produced from reject stone at a building stone quarry at Linby, although this tonnage is small and it is also currently inactive.
- 3.22. Permitted reserves therefore currently total 3.34 million tonnes, with average sales over the last 10 years standing at zero. Given that no aggregate is currently being worked, a landbank figure has not be calculated as it gives an unrealistically large figure.



Aerial drone image of Nether Langwith (Boon Hills) quarry by County Council officers in November 2022.

Imports and exports of crushed rock

- 3.23. With no sales from the only permitted site in Nottinghamshire, all crushed rock consumed in Nottinghamshire is therefore imported from other mineral planning authorities. The 2023 Aggregate Mineral Survey found that 904,000 tonnes of crushed rock was imported into Nottinghamshire, with Table 8 showing this continues to be predominantly sourced from Derbyshire, Leicestershire and Doncaster. Again, how far aggregates travel will be dependent upon the market.

Table 8: Crushed rock consumed in Nottinghamshire supplied by mineral planning authorities

Source MPA	2019 Survey	2023 Survey
East of England Region		
Cambridgeshire	<1%	
East Midlands Region		
Derbyshire	30 – 40%	40 – 50%
Leicestershire	20 – 30%	20 – 30%
Lincolnshire	<1%	1 – 10%
North Northamptonshire		1 – 10%
Peak District	1 – 10%	1 – 10%
Rutland		1 – 10%
North East Region		
Durham	<1%	
Northumberland	1 – 10%	
Northumberland National Park	<1%	<1%
North West Region		
Cumbria	<1%	
South Wales		
Powys	<1%	1 – 10%
South West Region		
Gloucestershire		<1%
West Midlands Region		
Shropshire	<1%	<1%
Staffordshire	1 – 10%	1 – 10%
Telford and Wrekin	10 – 20%	
Warwickshire	<1%	<1%
Yorkshire and Humber		
Doncaster	10 – 20%	10 – 20%
Yorkshire Dales	<1%	<1%

3.24. The [Derbyshire LAA \(2024, containing 2023 sales data\)](#) states that it is clear from the size of Derbyshire's and the Peak District National Park's landbank of aggregate grade crushed rock that it will be able to continue to supply markets as required and that the area will continue to be an important supplier of crushed rock on a wide geographical scale.

- 3.25. The [Leicestershire LAA \(2024, containing 2023 sales data\)](#) states that there is a sufficient permitted landbank of 22.6 years based upon the 10 – year sales average for Leicestershire, though note that a significant proportion of this lies within inactive sites.

Alternative aggregates

- 3.26. Since 1980 there has been a significant increase in annual alternative aggregate production in Great Britain (GB), rising from 20 million tonnes to a high of 71 million tonnes in 2007 (25% of total aggregates sales). Sales of recycled aggregates mirrored the fall of sales of primary aggregates nationally during the recession. However, sales of both primary and recycled aggregates have been increasing since the recession. In 2020 sales of recycled aggregates stood at 74 million tonnes (30% of total aggregates sales)¹. Britain is second in Europe for recycling aggregates, and it is estimated that alternative aggregates use in GB is around three times higher than the European average.
- 3.27. The British Geological Survey and Minerals Products Association acknowledge that further significant growth is likely to be limited due to the high levels that are already being recycled along with changing construction methods which are also likely to reduce the availability and quality of these materials in the future.
- 3.28. Local data for alternative aggregates is limited however the main types of alternative aggregates in Nottinghamshire are set out below.

Power Station Ash

- 3.29. Fly ash and furnace bottom ash (FBA) from power stations can be used as alternatives to virgin aggregates in the manufacture of concrete, cement and other construction materials. Nottinghamshire did have three power stations which produced around 1.7 million tonnes of ash each year in 2014². There is limited local information as to how much of the ash is sold, but nationally

¹ Minerals Product Association – Profile of the UK Minerals Products Industry 2023 edition

² East Midlands Aggregate Working Party - Annual Survey and Report 2014

around 70 per cent of total fly ash and 100 per cent of FBA produced in 2014 was sold for use in construction products and engineering materials. The remaining material is often stored in stockpiles and can be sold at a later date³.

- 3.30. In addition to Cottam Power Station closing in September 2019, the last remaining coal-fired power station in the United Kingdom, Ratcliffe-on-Soar stopped producing electricity on September the 30th 2024. Whilst the closure of the power stations means no new FBA and PFA (Pulverised Fuel Ash) will be produced, there are deposits of PFA at the power stations that will likely be extracted. For example, planning permission was granted in September 2024 for extraction of 6.5 million tonnes of disposed PFA in Lound from Cottam power station. PFA will therefore continue to be an alternative aggregate in the market until deposits have been exhausted.

Construction and demolition waste

- 3.31. Construction and demolition waste is made up of a range of materials including rubble, metals, glass, plastic and other construction materials.
- 3.32. Approximately 83% of construction and demolition waste has been re-used or recycled. Old concrete and rubble are often crushed on site using mobile processing plant and used in situ as bulk fill. The remainder of the materials, such as metal, is taken off site and sent to be processed elsewhere.
- 3.33. Using the Environment Agency Waste Data Interrogator, an estimate of the amount of material that could be used as recycled or secondary aggregate can be made. Using the 2023 data, the latest available, this is estimated at 514,508 tonnes.
- 3.34. The interrogator can also be used alongside local knowledge to identify facilities in Nottinghamshire and Nottingham that could potentially handle recycled and secondary aggregates. Using this method, 28 active facilities were identified, these are listed in [Appendix 1](#).

³ UK Quality Ash Association

- 3.35. Worn out rail ballast is taken by rail to recycling centres for crushing into aggregate. As this material comprises high quality limestone or granite it can be re-processed for high- grade uses. There are approximately 7 rail ballast recycling sites across the country, with one of these located at Toton railway sidings in Stapleford within Broxtowe Borough.
- 3.36. Road planings produced as a result of highway resurfacing schemes can be used as a recycled aggregate to form a range of surfaces such as car parks, driveway or tracks. The availability of this material will vary depending on the level of highway maintenance being carried out at any given time.
- 3.37. No sales data exists for specific types of recycled or secondary aggregates. However, as these types of aggregates are available on the open market, their contribution is already taken into account when calculating future demand for primary aggregates.
- 3.38. Planning policies relating to recycled and secondary aggregates can be found in the Nottingham and Nottinghamshire Waste Local plan (adopted September 2025).

Local Production conclusion

- 3.39. Compared to historic (pre-2007) levels, sales of sand and gravel have remained subdued throughout much of the last decade, with Sherwood sandstone seeing a rise back to these pre – 2007 levels in 2024. The 2020 sales were particularly impacted by the COVID-19 pandemic and related lockdowns, resulting in a significant decline, whilst sales of sand and gravel in 2023 and 2024 have been impacted by flooding in the Trent Valley. The figures also reflect the absence of new quarries becoming operational and permitted quarries remaining dormant, with this also explaining the slight fall in permitted reserves and so the landbank compared to the 2023 LAA.
- 3.40. At the end of 2024, Nottinghamshire's sand and gravel landbank remained above the 7 – year minimum requirement, standing at 15.47 years. While the

current landbank is sufficient, the adopted Nottinghamshire Minerals Local Plan (March 2021) highlights that further reserves will need to be released over the plan period, extending to 2036, to ensure a steady and adequate supply. The plan allocates sites to meet this demand, including five extensions to existing quarries and one new greenfield site as outlined in Policy MP2. The forecast of demand for sand and gravel was based on an annual production figure of 1.7 million tonnes (Policy MP1). With the current 10-year average sales at 1.24 million tonnes and the 3-year average sales at 1.03 million tonnes, the Plan ensures that any future growth or increase can be accommodated and so provides adequate provision over the plan period, thus planning positively.

- 3.41. Exports of both sand and gravel and Sherwood Sandstone continue to account for a significant proportion of total sales. This trend is expected to persist over the plan period as sand and gravel resources in areas like Rotherham and Doncaster remain limited.
- 3.42. By the end of 2024, Nottinghamshire had sufficient permitted aggregate reserves of Sherwood Sandstone to meet the 7-year minimum landbank, standing at 19.18 years. However, additional reserves will need to be released over the life of the Nottinghamshire Minerals Local Plan (to 2036), as existing quarries are worked out. Allocation of new sites are included within Policy MP3. The forecast for demand for Sherwood Sandstone was based upon the production figure of 0.37 million tonnes required annually (Policy MP1), with the current 10-year sales average at 0.33 million tonnes and the 3 years sales average at 0.35 million tonnes, the Plan still provides adequate provision for the foreseeable future. Future LAA's will indicate whether the upturn in sales in 2024 continues to be a trend that will need to be taken account of.
- 3.43. Crushed rock sales remain at zero with the county's needs being met by imports from adjoining counties, mainly from Derbyshire and Leicestershire. A landbank figure has not been calculated as it would be unrealistic.

- 3.44. Recycled and secondary aggregates continue to play a crucial role in meeting wider aggregate demand across Nottinghamshire. However, the extent to which recycled aggregates can replace primary aggregates will depend on various factors, such as their availability, cost, and the technical specifications required for particular end uses. Since recycled aggregates are readily available on the open market, their contribution has already been accounted for in calculations of future primary aggregate demand.



Image at Langford quarry from Tarmac and RSPB MPA Restoration Awards report (2024).

4. Future Aggregate Provision

- 4.1. In order to provide a steady and adequate supply of aggregates over the plan period, the NPPF states that a LAA should also take into account any important local considerations and national and sub national guidelines. These are considered below.

National and Sub – National Aggregate Guidelines

- 4.2. Prior to the introduction of the NPPF, the supply of land-won aggregates in England was based on national and sub national guidelines for aggregates provision published by the Department for Communities and Local Government (DCLG). The most recent guidelines covering the period 2005-2020 were published in 2009.
- 4.3. The East Midlands Aggregate Working Party used these guidelines to produce draft apportionment figures for each MPA. The figures were then approved by the East Midlands Regional Assembly in 2010 and were to be incorporated into the Regional Plan via the review process. However, due to the abolition of the Regional Spatial Strategy the figures were never adopted.
- 4.4. The guidelines for the East Midlands stood at 174 million tonnes for sand and gravel and 500 million tonnes for crushed rock over the 2005-2020 period. For Nottinghamshire the guidelines were equivalent to 3.81 million tonnes per annum (a combined figure for sand and gravel and Sherwood Sandstone).
- 4.5. It was decided at the Aggregate Working Party meeting in February 2013 that the draft 2009 figures were considered out of date as they were only based on aggregate output from a period of economic growth, and should, therefore, not be taken into account when determining the new apportionment figures.
- 4.6. It is understood that following the 2024 national elections and the 2023 National Aggregate Survey that MHCLG is considering the option of issuing new aggregate guidelines at national and regional level. However, no decision has yet been made and remains a subject to further discussion with Ministers.

- 4.7. Long term demand for aggregates to be provided for in the Minerals Local Plan will be reviewed annually through the LAA using the 3 and 10 – year sales averages as the key evidence base specifically monitoring trends. Annual monitoring of the Local Plan will also take place based on the updates to the LAA and if required early review may be necessary.

Sand and Gravel Provision

- 4.8. The biggest planning issue for Nottinghamshire and Nottingham is the long-term provision of sand and gravel over the plan period.
- 4.9. Based on the most recent data, the 10-year average figure stands at 1.24 million tonnes. This figure has steadily fallen since the first LAA was produced in 2014, as shown in Table 9, and reflects the loss of higher pre-recession sales figures and the greater influence of lower sales figures since. The three-year average figure has also slowly fallen since the first LAA was produced, the latest figure stands at 1.03 million tonnes, with the impacts of the COVID – 19 pandemic and flooding along the River Trent significantly impacting this figure.

Table 9: Sand and Gravel average sales figures

	2014 LAA	2015 LAA	2016 LAA	2017 LAA	2108 LAA	2019 LAA	2020 LAA	2021 LAA	2022 LAA	2023 LAA	2024 LAA
10-year (million tonnes)	2.05	1.89	1.7	1.53	1.45	1.47	1.41	1.37	1.35	1.29	1.24
3-year (million tonnes)	1.46	1.45	1.4	1.36	1.38	1.44	1.31	1.22	1.18	1.16	1.03

Resource depletion in the Idle Valley and the North of the County

- 4.10. The Idle Valley, located in the north of the County, has a long history of sand and gravel extraction. Traditionally a large proportion of this, 30%, has supplied markets in Sheffield, Rotherham and Doncaster due to its close proximity and limited mineral reserves elsewhere.
- 4.11. Resource depletion is now starting to limit output, and since 2006 the number of active quarries has fallen from 8 to 2. This has seen production capacity and output fall, with some of the reduction in output due to the delay in implementing the permitted quarry at Sturton Le Steeple.
- 4.12. The impact of resource depletion in the Idle Valley on the Rotherham and Doncaster markets is discussed further in the following chapter.

Marine won sand and gravel

- 4.13. Marine won sand and gravel is not used in Nottinghamshire due to the availability of locally sourced land won material and the high costs involved in transporting the mineral long distances. It is therefore assumed that marine sources are not a significant issue for Nottinghamshire and will therefore not form part of this assessment.

Sherwood Sandstone Provision

- 4.14. Sherwood Sandstone sales for aggregate purposes, are much lower than sand and gravel. Since 2017 the 10-year average has remained relatively stable, fluctuating between 0.36 and 0.30 and currently stands at 0.33 million tonnes. The latest 3-year average stands at 0.35 million tonnes, with the higher sales figure in 2024 influencing this, bringing the average back to levels seen prior to 2021 as shown in Table 10.

Table 10: Sherwood Sandstone average sales figures

	2014 LAA	2015 LAA	2016 LAA	2017 LAA	2108 LAA	2019 LAA	2020 LAA	2021 LAA	2022 LAA	2023 LAA	2024 LAA
10-year (million tonnes)	0.40	0.39	0.37	0.36	0.36	0.37	0.35	0.33	0.31	0.30	0.33
3-year (million tonnes)	0.35	0.35	0.35	0.36	0.39	0.41	0.34	0.25	0.17	0.20	0.35

- 4.15. No additional specific local factors have been identified when considering the future apportionment for Sherwood Sandstone.

Crushed Rock (limestone) Provision

- 4.16. Crushed rock (limestone) is only permitted to be worked from one quarry in Nottinghamshire and production has been dormant since 2007. This has resulted in the 10 – year and 3 – year average standing at 0 since 2014 as shown in Table 11.

Table 11: Crushed Rock average sales figures

	2014 LAA	2015 LAA	2016 LAA	2017 LAA	2108 LAA	2019 LAA	2020 LAA	2021 LAA	2022 LAA	2023 LAA	2024 LAA
10-year (million tonnes)	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00
3-year (million tonnes)	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00

- 4.17. A pre-cast concrete factory was built near Worksop in 2009 and produces concrete structures on site for delivery and installation at construction sites. The factory uses crushed limestone as part of the production process.

- 4.18. No recent data on consumption is available however this was previously around 40,000 tonnes per annum. The factory is currently supplied by quarries in Derbyshire.

Future aggregate provision conclusion

- 4.19. National guidance states that consideration should be given to the national and subnational demand forecasts, however these are now considered out of date as they were based purely on a period of economic growth over a shorter timescale than the 10- year sales average stated in the NPPF.
- 4.20. Prior to the Covid-19 pandemic the 10-year sales average for sand and gravel had begun to flatten out as higher pre-recession figures have fallen out of the data and current quarrying output in Nottinghamshire remained flat. The 3 - year average sales figure highlights the impact flooding events have had on sales, with this seeing both the 10 and 3 – year averages fall. This has meant the adopted Minerals Local Plan demand forecast is higher than both sales averages, though this enables the Plan to accommodate for any future growth and so ensure continued supply, thus planning positively. It is therefore concluded that the demand forecast set out in the adopted Minerals Local Plan does not need to be reviewed at this time, with a statutory 5 – year review to be undertaken by March 2026.
- 4.21. The 10 – year sales average for Sherwood Sandstone has slowly fallen and now appear to be stabilising. The 3 – year average has fluctuated, with it falling in 2021 and 2022 but then seeing an increase in 2024 back to pre – 2021, and so pre – pandemic, levels. However, there is currently no evidence to suggest that the demand forecast as set out in the adopted Minerals Local Plan needs to be reviewed and will continue to be monitored.
- 4.22. Crushed rock sales remain at zero as the majority of material used in Nottinghamshire is imported from adjoining authorities. Based on the current sales data it is not considered necessary to identify additional reserves.

- 4.23. Resource depletion in the Idle Valley along with continued demand from Rotherham and Doncaster will remain a long-term issue, however in the short-term adequate reserves remain.
- 4.24. The potential use of marine sourced sand and gravel is not a significant issue for Nottinghamshire due to the availability of locally sourced land won mineral and the significant additional cost in transporting marine sourced minerals greater distance.

5. Future Growth

- 5.1. Consideration of future growth is also important when considering future need for aggregates, with the below detailing information that has been used to understand potential future growth in demand in Nottinghamshire.

Population Forecasts

- 5.2. The population of Nottinghamshire (the geographic County, including Nottingham City) is expected to grow from approximately 1.26 million in 2023 to around 1.36 million by 2036, based on the latest Office for National Statistics data. This growth is anticipated to be concentrated in the major urban areas of the Nottingham conurbation, Newark, and Mansfield. However, it remains challenging to make direct comparisons between population growth and minerals use.

House building

- 5.3. The new government has a key objective to ensure an adequate provision of housing across the country to address the ongoing housing crisis. Recent policy changes include the introduction of a new housing supply framework aimed at increasing the pace of housing delivery and promoting affordable housing options. Within Nottinghamshire, the seven District and Borough councils, along with Nottingham City Council, are now required to align their Local Plans and core strategies with these new directives to ensure that identified local housing needs are being met and anticipated future demands are effectively planned for. This includes a focus on sustainable development and integration of infrastructure to support new housing developments.
- 5.4. Based on the most recent housing trajectory data available from the districts and boroughs (Table 12), house building rates in Nottingham and Nottinghamshire are forecasted to peak in 2024 and 2025, with an average of 6,819 houses built per annum between 2025 and 2029. After 2029 the forecast begins to fall each year, though it should be noted that this forecasts only includes known planning permissions and allocations, and so the latter years includes those only with long build out rates. It is therefore likely that more

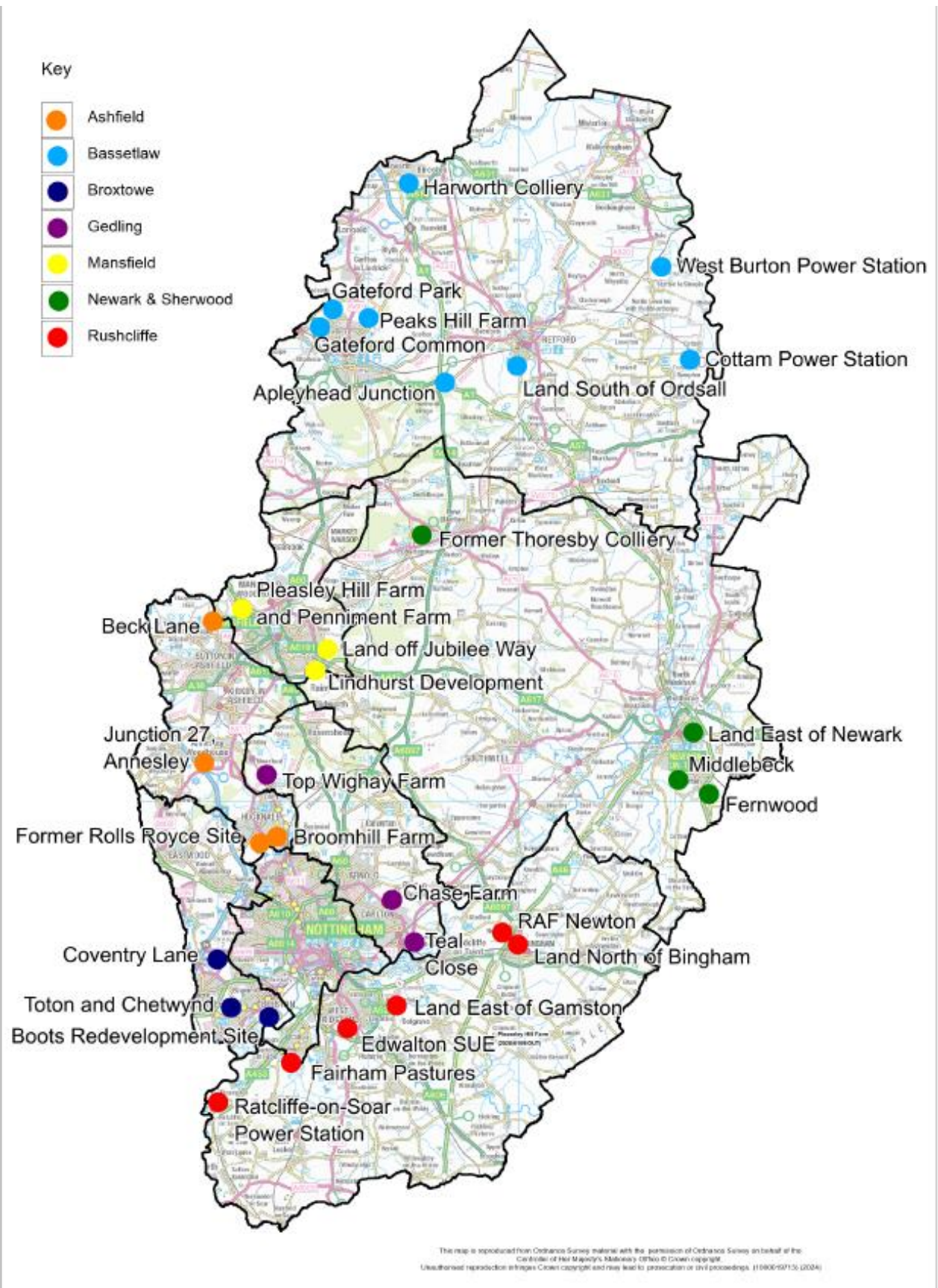
permissions will be granted over time which will increase the housing trajectory for the latter years.

Table 12: Housing trajectory by District/ Borough

District/ Borough	24/25	25/26	26/27	27/28	28/29	29/30	30/31	31/32	32/33
Ashfield	448	305	202	554	284	196	129	114	95
Bassetlaw	1036	805	622	687	674	591	511	409	392
Broxtowe	844	832	729	811	616	616	616	616	486
Gedling	704	760	687	519	427	363	272	254	254
Mansfield	616	697	655	616	554	559	416	290	232
Newark	558	586	575	732	892	941	861	842	732
Nottingham city	2941	1868	1387	2421	2046	1811	1890	1151	882
Rushcliffe	1222	1358	1135	1186	1056	826	729	729	876
TOTAL	8369	7211	5992	7526	6549	5903	5424	4405	3949

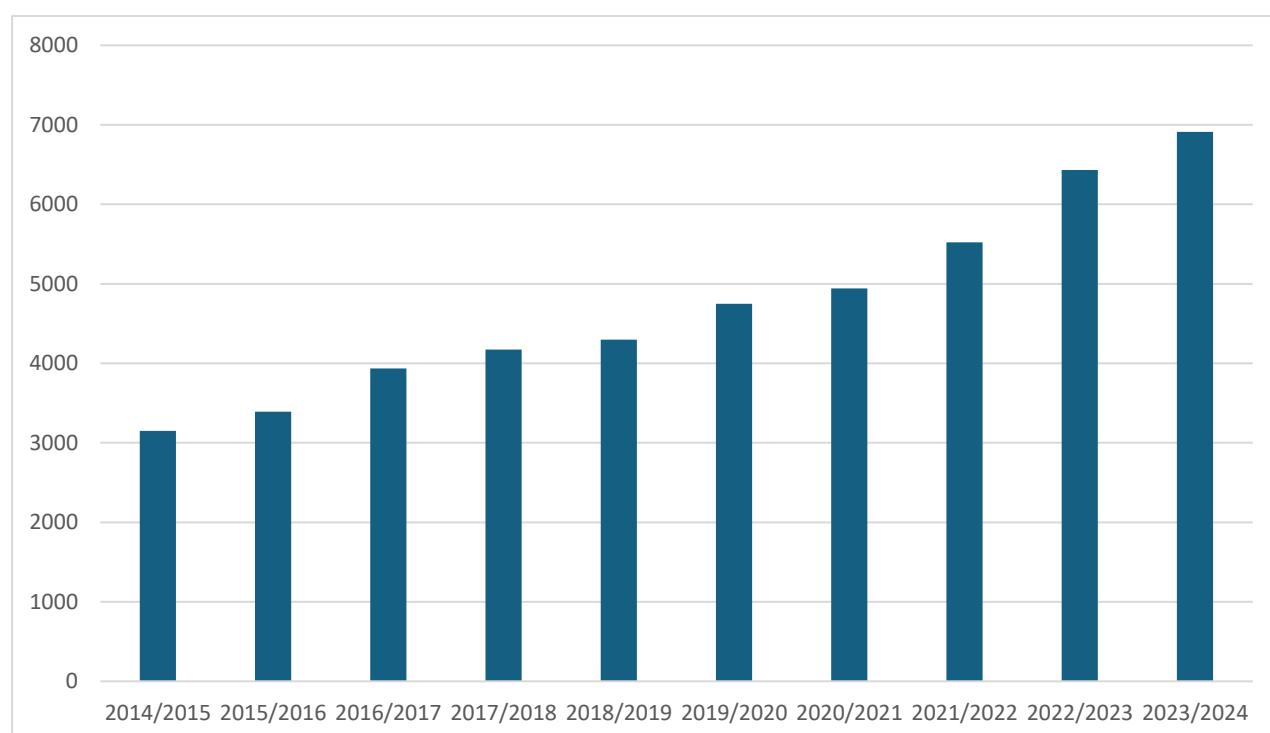
- 5.5. Plan 2 identifies the larger, strategic growth sites around the County which are over 500 dwellings, or the equivalent sized commercial development. These are sites that are either permitted or allocated within the Borough and District Local Plans. Such large-scale developments are also often accompanied by new infrastructure in order to support growth, for example new roads and new schools, which will also require construction material.
- 5.6. Figure 4 below shows that housing completions in the past 10 years has been increasing, with completions in the financial year of 2023/ 2024 reaching a new high of 6,910 dwellings per annum. This rising trend aligns with the Government's efforts to address the housing crisis and ramp up house building. A new methodology to calculate housing need was introduced to encourage house building, with this taking the combined requirement for Nottinghamshire and Nottingham from 4,736 dwellings per annum to 5,627. The past completions in Figure 4 show this level of house building, and beyond, can be achieved in the area.

Plan 2 – Nottinghamshire Strategic Development Sites



5.7. During the construction of new houses, a range of aggregate minerals will be consumed including sand and gravel for uses such as concrete, Sherwood Sandstone for mortar, clay for bricks and tiles along with crushed rock for more general construction uses. Data from the Minerals Products Association estimates that a typical new house uses up to 200 tonnes of aggregates and associated mineral products⁴, although the actual quantities for each type of aggregate are unclear. It is also worth noting that the Minerals Products Association estimate that new house building only accounts for around 20% of overall aggregate consumption.

Figure 4: Past 10 – year housing completions in Nottinghamshire and Nottingham



⁴ [Mineral Products Association. Profile of the UK Mineral Products Industry 2023 edition.](#)

Infrastructure Projects identified for Nottinghamshire

- 5.8. There are several potential infrastructure projects planned in Nottinghamshire which could impact local aggregate demand. This includes road improvement schemes as well as potential large-scale developments.
- 5.9. These schemes could indicate an increase in demand for aggregates, particularly for the construction and road infrastructure sectors, as Nottinghamshire continues to expand its transport network and housing developments. However, given the current lack of detail, the amount of minerals required is uncertain. Future LAAs will continue to monitor progress on these schemes and update the LAA as necessary.

Road Improvement Schemes

- 5.10. All potential road improvement schemes in Nottinghamshire are listed below however, several of these are uncertain in terms of actual dates for delivery owing to funding commitment from Government not being certain and the transfer of responsibility for prioritising projects to the East Midlands Mayoral Combined County Authority.

A46 Newark Bypass

- 5.11. This scheme will widen a 6.5km section of the A46, improving traffic flow and journey reliability on this strategic route. The bypass will connect Lincoln to Warwick, supporting the broader and it is expected to reduce congestion around Newark-on-Trent. The scheme has been subject to an examination under the Nationally Significant Infrastructure Projects regime, and a decision is expected later this year.

A614/ A6097 Junction Improvement

- 5.12. This major road improvement scheme involves a number of junctions along the A614 and A6097 corridor. Funding was confirmed for this scheme on the 18th of September 2025, with work anticipated to commence in January 2026. A decision on funding this scheme has been delayed by Government.

A52 Nottingham Junctions

- 5.13. Improvement works on the A52, including the Nottingham Knight and Wheatcroft roundabouts, are planned. These junctions currently experience high traffic volumes, and the upgrades are designed to manage congestion more effectively. A public inquiry on the project was held in July 2025.

Large Scale Development Projects

- 5.14. There are currently three known large – scale projects in and around Nottinghamshire that will require significant volumes of minerals, with these detailed below.

Spherical Tokamak for Energy Production (STEP)

- 5.15. In October 2022 the Government confirmed that the former coal – fired power station at West Burton in the north of Nottinghamshire would be the location for the STEP (Spherical Tokamak for Energy Production) prototype fusion energy plant.
- 5.16. Considering the scale of the new powerplant and its associated infrastructure, a significant amount of minerals will be required for construction. This will include sand and gravel as well as crushed rock and will be sourced from Nottinghamshire but also regionally and nationally, therefore impacting and increasing demand for aggregates.
- 5.17. With construction not expected until mid – 2030, at this time it is difficult to forecast the requirements for this project and the impact on the demand for aggregates. The Council is in contact with UKIFS (United Kingdom Industrial Fusion Solutions) around many different issues, including minerals, and will continue to monitor the project and demands in future LAA reports when further detail is acquired.

Trent Clean Energy Supercluster Vision

- 5.18. The allocation of West Burton for the STEP project has led to potential future opportunities in the wider area, known before as megawatt valley due to the cluster of old coal fired power stations in West Burton, Cottam and High Marnham. The Trent Supercluster Vision looks to build upon this opportunity

to deliver wide scale regeneration that will lead to the delivery of innovation for clean energy as well as making the area an outdoor leisure destination.

- 5.19. The details for this remain vague currently and therefore the known impact on future mineral demand is limited. As with STEP, the Council will continue to monitor the progress of this.

East Midlands Gateway Phase 2

- 5.20. Following development of the logistic park East Midlands Gateway near East Midlands airport, just outside the southern boundary of the County, plans have now been submitted for a second phase of industrial and logistic development. The applicant has identified that Nottinghamshire as a neighbouring authority will be affected by the project in terms of minerals and waste.
- 5.21. Estimates of material requirements have been given and the applicant is in contact with Nottinghamshire, Leicestershire and Derbyshire County Council. It is estimated that the requirement for the project is between 1-5% by volume of the regional baseline availability.
- 5.22. The Council will continue to monitor this project through the examination period for the development to understand any impacts on future demand.

Mineral Production Statistics

- 5.23. The mineral production statistics are now primarily sourced from the latest ProdCom survey, which provides detailed information on mining and quarrying activities across Great Britain. This survey offers comprehensive data on the production and sales of various minerals.
- 5.24. The latest ProdCom survey results, released in July 2025, indicate that sales in other mining and quarrying in gravel and sandpits has increased in 2024 from 2023. Data for other minerals are disclosed⁵.

⁵ [UK manufacturers' sales by product Statistical bulletins - Office for National Statistics \(ons.gov.uk\)](https://ons.gov.uk/statistics/publications/bulletins/uk-manufacturers-sales-by-product)

East Midlands Aggregate Working Part – Annual Monitoring Report 2024

- 5.25. The EMAWP Annual Monitoring Report collates data relating to aggregates sales for each Minerals Planning Authority in the East Midlands. For 2023, sales of land – won sand and gravel was 4.9 million tonnes, a 18% decrease in sales from 2022 and the lowest level in the last 10 years, including 2020 which was impacted by the pandemic.
- 5.26. While Nottinghamshire has limited crushed rock production, monitoring sales across the East Midlands remains essential as an indicator of overall demand. In 2023, the East Midlands recorded aggregate sales of 28.2 million tonnes, a small decrease from 28.2 million tonnes in 2022.

National Aggregate Minerals Survey

- 5.27. The four yearly national aggregate minerals survey provides information on the national and regional sales, inter-regional flows, transportation, consumption and permitted reserves of primary aggregates in England. The surveys cover both land won and marine dredged aggregates. The survey is used to inform government on the production, movement and consumption of aggregates in order to monitor and revise the aggregates guidelines, which support the National Planning Policy Framework, and to monitor and develop planning policies for the managed supply of aggregates in England. The last survey was based on 2023 data and was published in August 2025. The results of the survey are detailed in Chapter 3.

Future demand from Rotherham and Doncaster Markets

- 5.28. The Rotherham and Doncaster Local Aggregates Assessment 2024 (2023 sales data) reports that although its sand and gravel landbank remains at 13 years, sharp sand reserves are limited. Consequently, the region will continue to rely on imports of sand and gravel from Nottinghamshire and neighbouring authorities.
- 5.29. Given that Nottinghamshire has traditionally supplied a large proportion of sand and gravel to the Rotherham and Doncaster markets from the Idle Valley

and North Nottinghamshire, their future requirements are unlikely to be completely new demand, and this has been taken into account as part of the 10-year average sales figures. It is likely that in the short term, output from the Idle Valley and north Nottinghamshire will be maintained at current levels from existing permitted reserves.

- 5.30. A planning permission at Sturton Le Steeple with an estimated output of 500,000 tonnes per annum was initially implemented in 2017. Aggregate Industries (now Holcim) acquired the mineral rights to extract sand and gravel at quarry in June 2023 and have since progressed the development of the quarry in consultation with key stakeholders. This site will provide a valuable long-term source of sand and gravel to supply North Nottinghamshire and the Rotherham and Doncaster markets for approximately 20 years.

Future demand from Leicestershire

- 5.31. The 2024 Leicestershire LAA, containing 2023 sales, states that the existing sites have a total potential production capacity of around 800,000 tonnes per annum, which means that they would be capable of producing sufficient material to satisfy the level of provision identified in the adopted Minerals and Waste Local Plan. The sites would not however be able to meet the County's future requirements without the benefit of extensions to their permitted operations. Given sand and gravel landbank currently stands just under 3 years additional sand and gravel may need to be sourced from reserves outside the county.
- 5.32. Some sand and gravel is already exported from Nottinghamshire to Leicestershire and in 2023 20 – 30% of the total sand and gravel consumed in Leicestershire was supplied from Nottinghamshire.
- 5.33. In the future additional sand and gravel from Nottinghamshire could potentially serve Leicestershire, however at this stage it is difficult to quantify the amount as it will depend on the actual shortfall in the future and the amount of sand and gravel being supplied by other Mineral Planning Authorities such as Lincolnshire and Derbyshire.

Future Growth Conclusions

- 5.34. National sales of aggregates have shown a consistent upward trend since the lows experienced in 2012, with the East Midlands also reflecting this growth up to 2024. The East Midlands also reflects the fall in sand and gravel sales Nottinghamshire has experienced.
- 5.35. The identified infrastructure projects in Nottinghamshire are somewhat uncertain and the exact amount of future aggregate demand is unknown. Future LAA reports will continue to monitor this and the Council to continue engagement on the large – scale infrastructure projects.
- 5.36. Nottinghamshire's population is projected to grow steadily throughout the plan period. Planned housing construction rates are expected to continue at similar levels seen recently. Continuous monitoring of actual housing completions is essential, as these figures provide a more accurate reflection of economic health and construction demand. While house building will contribute to overall aggregate demand, it is only one of several factors to consider.
- 5.37. Demand for sand and gravel from Rotherham and Doncaster is likely to persist, given the limited resources available in those areas. Remaining reserves in the Idle Valley are projected to meet short – term needs; however, as these resources are depleted, sourcing sand and gravel may necessitate transportation from greater distances.
- 5.38. Future demand for sand and gravel from Leicestershire may rise, but current data does not provide clarity on the specific quantities required or the timelines involved. Economic conditions will play a significant role in shaping this demand.
- 5.39. Based on the information currently available, it is concluded that evidence suggests no immediate necessity to identify additional aggregate reserves to accommodate future growth throughout the plan period beyond the rolling 10 – year average sales levels.

6. Conclusion

- 6.1. The provision of sand and gravel is the biggest issue for Nottinghamshire and Nottingham over the plan period. The 10 – year sales average has fallen from 2.05 million tonnes in the LAA published in 2014 to 1.24 million tonnes in this LAA. This decline is largely attributed to the impact of the recession in 2007, followed by a slow recovery in construction activity and changing market demands. Despite the presence of significant sand and gravel resources in the Trent Valley, ongoing economic uncertainties, flooding and shifts towards alternative materials in construction continue to suppress sales figures.
- 6.2. Additional reserves will be needed over the plan period to 2036 to replace existing quarries as they are worked out. The adopted Minerals Local Plan allocates a mix of extensions to existing permitted quarries and one new quarry. The expected commencement of quarrying at the large Sturton le Steeple quarry is welcomed.
- 6.3. Several significant infrastructure projects are planned in Nottinghamshire, but implementation and volumes needed is uncertain at this time. It is though noted that these will require significant amounts of aggregate and could increase need.
- 6.4. Resource depletion in the Idle Valley is likely to be offset by the expected working of Sturton le Steeple quarry which will influence future exports to South Yorkshire. The extent of the impact will depend on the level of demand, due to economic conditions, and the increasing trend of replacing sharp sand with crushed rock in concreting products.
- 6.5. Demand for additional sand and gravel from Leicestershire may increase in the future however at present its unclear as to the quantities that maybe needed and the timescales for this. To a certain extent demand will also depend on future economic conditions. As a result, this will be monitored through annual sales and future Aggregate Working Party full survey minerals movement data.

- 6.6. Sherwood Sandstone sales are lower than sand and gravel sales, though sales have recovered in the past two years since the pandemic and have increased by 36% in 2024. Additional reserves will be needed over the plan period and as part of the adopted Mineral plan allocates extensions to the existing permitted quarries.
- 6.7. The importation of crushed rock from adjoining areas to meet the County's needs is set to continue as limestone sales from Nottinghamshire remain at zero. The permitted but mothballed quarry at Nether Langwith contains permitted reserves and could be re-opened by the operator to meet additional demand in the future.
- 6.8. Recycled and secondary aggregates continue to play an important role in meeting wider aggregate demand, however the ability of recycled aggregates to replace primary aggregates will be dependent on a range of issues such as availability, cost, and the technical specifications required for specific end uses. As these types of aggregates are available on the open market, their contribution is already considered when calculating future demand for primary aggregates.
- 6.9. The LAA will be reviewed annually taking account of the most recent aggregate sales data and any other relevant local data. This will ensure that there is an adequate and steady supply of aggregate minerals provided over the plan period and that any fluctuations in future requirements can be addressed.

Appendix 1: Aggregate Recycling Sites in Nottinghamshire and Nottingham

Site Name	Operator	Grid Reference	Status	Planning Permission End Date
A B Waste Disposal	John Edward Akins and Geoffrey Alan Adkins	SK 454672 362168	Active	N/A
A B Waste Disposals Transfer Station/ Bleak Hills	A B Waste Disposal Limited	SK 452643 359984	Active	N/A
Aggregate Recycling Facility/ Kirkby Skip Hire	Central Waste (UK) Limited	SK 454516 348848	Active	N/A
Bilthorpe Oil Treatment Plant	Enva England Specialist Waste Limited	SK 465277 360659	Active	N/A
Boughton Recycling Facility	Jordan Road Surfacing Limited	SK 468410 368298	Active	N/A
Bunny Material Recycling Facility	Johnsons Aggregates	SK 458045 328656	Inactive	
Carl Wright Haulage & Plant	Carl Wright Haulage & Plant Limited	SK 454764 348418	Active	N/A
Cast Quarry	Midland Landfill	SK 453304 363423	Active	31/12/2030
Central Waste	David Robinson	SK 454516 348848	Active	N/A
CMEC Demolition	CMEC 4 Limited	SK 455254 337994	Active	N/A
Colwick Transfer Site	Biffa Waste Services Ltd	SK 46192 340224	Active	N/A
Coneygre Farm	Lee Reclaim Ltd	SK 470594 347806	Active	10/06/2027
Collins Earthworks Recycling Facility	Collins Earthworks Limited	SK 448885 355039	Active	N/A
Colson Transport Limited	Colson Transport Limited	SK 455031 343504	Active	N/A
C P S	C P S Contractors	SK 469112	Active	N/A

Site Name	Operator	Grid Reference	Status	Planning Permission End Date
Contractors	(Limited)	376144		
Cupit Plant Hire Ltd	Cupit Plant Hire Ltd	SK 476891 368150	Active	N/A
Enva Colwick Recycling and Resources Recovery Facility	Enva England Limited	SK 463168 339793	Active	N/A
JRN Aggregates Depot	JRN Contracting (Yorkshire) Limited	SK 461913 390763	Active	N/A
Moorbridge Works	Mr Peter Allsop and Mr Jeffrey Hillier	SK 454754 346808	Active	N/A
Oakfield Recycling Limited	Oakfield Recycling Limited	SK 454556 348815	Active	N/A
Retford Waste Limited	Retford Waste Limited	SK 466768 387559	Inactive	N/A
Sadlers Waste	Sadlers Waste Limited	SK 453582 341223	Active	N/A
Scrooby Top Quarry	Rotherham Sand and Gravel Co. Ltd	SK 465387 388912	Active	31/12/2035
Smart Skip Hire	Smart Waste Services Limited	SK 450986 357121	Active	N/A
Skipit Quarry Farm	Nubeau Holdings Ltd	SK 479979 351040	Active	N/A
Toton Sidings	Network Rail Infrastructure Limited	SK 448642 334839	Active	N/A
Vale Skip Hire	Vale Skip Hire Limited	SK 458479 338989	Active	N/A
Welbeck Colliery Waste Facility	Tetron Welbeck LLP	SK 458315 370683	Active	N/A