13th Local Aggregates Assessment for Gloucestershire

Covering the period: 01/01/2023 to 31/12/2023

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Any enquiries regarding this publication should be sent to:
mwpolicy@gloucestershire.gov.uk or

Minerals & Waste Policy | Planning & Economic Development| Economy, Environment & Infrastructure | Gloucestershire County Council | Shire Hall | Westgate Street | Gloucester | GL1 2TG

All hyperlinks contained in this document are correct as of June 2025

Gloucestershire
COUNTY COUNCIL

Gloucestershire summary of sales and reserves for the period | 01/01/2023 – 31/12/2023

	2023 Sales (in million tonnes)	10-year Sales Average (in million tonnes per annum)	3-year Sales Average (in million tonnes per annum)	LAA Rate Change (compared to 2022)	LAA Rate (in million tonnes)	Reserves (in million tonnes)	Landbank (in remaining years)	Theoretical Capacity (in million tonnes per annum)	Comments
All land-won sand and gravel[1]	0.341 mt	0.602 mtpa	0.448 mtpa		0.602 mtpa	3.711 mt	6.16 years	Around 0.7 mtpa (estimated maximum).	Sales for 2023 are notably lower than the 10-year and 3-years sales average.
Crushed rock	0.861 mt	1.376 mtpa	1.049 mtpa		1.376 mtpa	25.274 mt	18.37 yrs	Around 2.1 mtpa (estimated maximum including inactive sites).	Sales for 2023 are notably lower than the 10-year and the 3-years sales average.
Recycled Aggregate *(From fixed sites only)*	0.175 mt	8 year average 0.178mt	0.179 mtpa		0.178 mtpa *(However, this is only based on 8 years of data)*				This is the eighth year of reporting on local recycled aggregate supplies. Both the 8 year and 3 year average excludes secondary aggregates which had been combined in previous LAA reports.
Secondary Aggregates	0.048 mt	*Insufficient data available to date (This will emerge in future LAAs)*	0.048 mt	N/A	0.048 mtpa				This is the first year of reporting on secondary aggregate figures on their own. Therefore, there is insufficient data available for comparison. The figure is taken as an estimate from the planning permission to protect commercial confidentiality.
Trend analysis for Gloucestershire	Aggregate sales for both sand and gravel and crushed rock fell compared to the previous LAA. In terms of remaining reserves, the crushed rock landbank is more than the NPPF minimum landbank requirements but permitted reserves are not evenly distributed and there is a need for new permissions within the Forest of Dean resource area in order to maintain productive capacity. For sand and gravel, it is under the NPPF minimum landbank requirement. New reserves will be required to maintain landbank security over the remaining time horizon of the adopted Minerals Local Plan for Gloucestershire (2018 – 2032). A pattern of declining crushed rock sales may be emerging and will need to be carefully monitored and investigated over the coming years. In relation to secondary and recycled aggregate sales figures were lower in 2023 the LAA rate remained consistent.								

[1] Whilst marine-won sand and gravel is sold and used within Gloucestershire, none is presently landed at Gloucestershire's only commercial port – Sharpness Docks.

1. Introduction

1.1. This is the thirteenth LAA for Gloucestershire and contains data up to the end of 2023. Information on imports and exports was also sourced from the national aggregate mineral (AM) survey[2], which usually takes place every four to five years.

1.2. This document is broken into three main sections which consider: -

- Future demand for aggregates.
- Analysis of all supply options, and
- Assessment of the balance between demand and supply; and main conclusions.

[2] The most recent AM survey applies data recorded from 01/01/2019 to 31/12/2019. https://www.gov.uk/government/publications/aggregate-minerals-survey-for-england-and-wales-2019

2. Future demand for aggregates

2.1. National policy advises that to determine future demand for aggregates, mineral planning authorities should project forward the rolling annual average of 10 years sales data[3]. However, consideration may also be given to other relevant local information, which might suggest a different pattern of demand could occur.

2.2. The factors considered to have potential to affect demand are contained below:

Comparison of 3- and 10-year sales averages

	Annual aggregate sales (in million tonnes per annum)										10-Yr Ave	3-Yr Ave#
	2014	2015	2016	2017	2018	2019	2020	2021	2022	2023		
C/R	1.51	1.46	1.65	1.79	1.66	1.48	1.07	1.28	1.00	0.861	**1.376**	**1.047**
S/G	0.43	0.59	0.70	0.88	0.68	0.91	0.48	0.45	0.56	0.34	**0.602**	**0.448**
Total	1.94	2.05	2.35	2.67	2.34	2.39	1.55	1.73	1.56	1.20		

Future local house building

Annualised calculated future demand for new homes for all of Gloucestershire				
2024/2025	**2025/2026**	**2026/27**	**2027/28**	**2028/29**
2,776	2,922	2,865	4,514	4,410

Local economic ambitions and other planned major strategically significant infrastructure projects

There are two major strategical significant infrastructure projects occurring in Gloucestershire over the coming years:

- A417 Missing Link – A Nationally Significant Infrastructure Project (NSIP) for a- Major highway upgrade. Anticipated requirements of upwards of 200,000 tonnes of different primary, secondary and recycled aggregate products. Construction began in 2023 and is due to be complete during 2027.

[3] National Planning Policy Framework (NPPF) (2024)) paragraph 226, point a) details the application of 10 years sales data as part of the LAA process;

- M5 Junction 10 Improvements Scheme - Nationally Significant Infrastructure Project (NSIP) for a - Major highway upgrade. No material requirement details available at present. A decision on progressing the project is due later in 2025.

There are also a variety of locally significant development projects proposed. However, there is no evidence to suggest these will generate a greater demand for aggregates than is currently projected to take place.

Forecast demand as established through National and Sub National Guidelines on future aggregates provision (2005 – 2020)

The most recent national guidelines are very out of date. They covered the period between 2005 and 2020 and were based on sales and supply data analysed during the late 1990s and early 2000s. For Gloucestershire, the guidelines generate an annual local apportionment that was equal to 2.25 mtpa for the supply of crushed rock and 1.0 mtpa for sand and gravel. Actual sales of aggregate over the past 10 years have been significantly lower than following the envisaged trend of the local apportionment of the guidelines.

3. Aggregate supply options

3.1. LAAs should consider all future aggregate supply options, the potential supply option considerations for Gloucestershire are detailed below:

Landbank for crushed rock

25.275mt which equates to 18.37 years based upon the 10-year sales average of 1.376 mtpa.

Landbank for sand and gravel

3.711mt which equates to 6.16 years based upon the 10-year sales average of 0.602 mtpa.

Supplies of recycled & Secondary aggregates

During 2023 there were 10 sites with potential to produce recycled aggregates. The individual sales foe each year cannot be displayed due to commercial confidentiality.

8-Yr Av	3-Yr Av
0.178	**0.179**

(shown in million tonnes)

A single secondary aggregate site came online in 2019, this figure is estimated based on a percentage of permitted annual throughput.

2019	2020	2021	2022	2023	5-Yr Av	3-Yr Av
0.048	0.048	0.048	0.048	0.048	0.048	0.048

Imports and exports

Gloucestershire primary aggregate consumption (including origin data) for 2014 and 2019

	For 2014			For 2019		
	Locally sourced *(as a % of consumption)*	Imported *(as a % of consumption)*	Total Glos. Consumption	Locally sourced *(as a % of consumption)*	Imported *(as a % of consumption)*	Total Glos. Consumption
	All data in million tonnes					
S/G Land-won	0.33 (60%)	0.22 (40%)	**0.55**	0.54 (78%)	0.15 (22%)	**0.69**
S/G Marine-won	-	0.03 (100%)	**0.03**	-	0.05 (100%)	**0.05**
Crushed Rock	1.22 (64%)	0.69 (36%)	**1.91**	1.00 (57%)	0.74 (43%)	**1.74**
Aggregate Total	**1.55 (62%)**	**0.94 (38%)**	**2.49**	**1.54 (62%)**	**0.93 (38%)**	**2.47**

Gloucestershire primary aggregate sales (including destination data) for 2014 and 2019

	For 2014			For 2019		
	Local Sales *(as a % of total sales)*	**Exports** *(as a % of total sales)*	**Total Sales from Glos.**	**Local Sales** *(as a % of total sales)*	**Exports** *(as a % of total sales)*	**Total Sales from Glos.**
	All data in million tonnes					
S/G Land-won	0.33 (77%)	0.10 (23%)	**0.43**	0.54 (59%)	0.37 (41%)	**0.91**
Crushed Rock	1.22 (81%)	0.29 (19%)	**1.51**	1.00 (68%)	0.48 (32%)	**1.48**
Aggregate Total	**1.55 (80%)**	**0.39 (20%)**	**1.94**	**1.54 (64%)**	**0.85 (36%)**	**2.39**

Data sourced from the 2014 and 2019 aggregate minerals surveys for England and Wales

Potential for marine won sand and gravel

There are no active facilities within Gloucestershire that land marine-won sand and gravel. However, Sharpness Docks has the capacity to handle vessels up to a maximum of 6,000 tonnes (loaded), which could include aggregates.

No marine licences exist in the waters of the Severn estuary near to Gloucestershire for extracting marine-won sand and gravel.

Productive capacities

Crushed Rock

The productive capacity at crushed rock aggregate workings in Gloucestershire significantly reduced during 2024. After this time, new planning permissions will be required to support current levels of sales. However, there are currently applications awaiting determination for crushed rock sites. If no new planning permissions are granted, the ability of Gloucestershire mineral workings to continue to supply crushed rock aggregates at current levels will be at risk and will experience an unavoidable decline.

Sand & Gravel

The productive capacity at sand and gravel aggregate workings in Gloucestershire is expected to significantly reduce at around 2028. After this time, new planning permissions will be required to support current levels of sales. If no new planning permission materialise, the ability of Gloucestershire mineral workings to supply sand and gravel at current levels will be at risk and will experience an unavoidable decline.

Additional permissions granted since January 2024

Planning applications were granted at aggregate 3 sites within Gloucestershire during 2024 (one via appeal). These will contribute to forthcoming landbank calculations.

Planning proposals for aggregate working still to be determined

As of June 2025, the following aggregates proposals are still undetermined:

Application reference	Proposal Site	Aggregate type	Current estimated aggregate yield
Undetermined			
17/0122/FDMAJM	Stowe Hill / Clearwell Complex	Crushed Rock	2.5 mt
24/0024/FDS73M	Drybrook Quarry	Crushed Rock	1.8 mt

Potential future aggregate supply from within allocations contained within the Minerals Local Plan for Gloucestershire (MLP) (2018-2032)

MLP (2018-2032) Allocations	Aggregate type	Estimated yield in MLP allocation (million tonnes)
Land east of Stowe Hill Quarry#	Crushed Rock – Carboniferous limestone	Between 10 and 17 mt
Land west of Drybrook Quarry	Crushed Rock – Carboniferous limestone	Between 3 and 4 mt
Depth extension to Stowfield Quarry	Crushed Rock – Carboniferous limestone	7.4 mt
Land northwest of Daglingworth Quarry	Crushed Rock – Jurassic limestone	Up to 9 mt
Land south and west of Naunton Quarry	Crushed Rock – Jurassic limestone	Up to 10 mt (less than 5mt now remaining)
Land south east of Down Ampney	Sand & Gravel	7.8 mt (planning permission has was granted for 6.5mt (in 2024)
Land at Lady Lamb Farm, west of Fairford	Sand & Gravel	3 mt

[#] *Part of these areas are already subject to planning proposals that are still either to be determined or legal agreements reached as of June 2025 – see above section Planning proposals for aggregate working still to be determined*

The number of and the continuation of inactive sites

Crushed Rock

Out of the sites containing aggregate reserves Drybrook, Hornsleasow and Daglingworth Quarries were classed as inactive.

Sand & Gravel
Out of the sand and gravel sites with extant permissions none were classed as inactive.

Dormant sites

Two sites with the potential for crushed rock aggregate working were categorised as dormant within Gloucestershire up to the end of 2023. There were no dormant sand & gravel sites recorded during the year.

Dormant sites are excluded from the calculation of aggregate landbanks in accordance with national practice and as such do not have a direct impact upon supply unless a new permission is granted.

Significant site-related issues would need to be overcome at the two remaining dormant sites before consideration may be given to any future aggregate working. However, it is noted that the national infrastructure project – the A417 Missing Link will dissect part of Birdlip Quarry (one of Gloucestershire's dormant crushed rock quarries). The infrastructure project could stimulate a review of Birdlip Quarry as a continuing aggregate supply option for the future. In August 2022, a screening opinion (22/0021/SCREEN) was issued for the re-activation of minerals workings. This assumed that the site would be worked at an extraction rate of less than 30,000 tonnes per annum, over a period of approximately 25 years.

Restrictions upon the timescales for mineral working at individual sites (as of June 2024)

Crushed Rock
Most of the crushed rock working site in the Cotswolds have timeframes of until 2042 or beyond.

The sites in the Forest of Dean have much shorter permissions. Stowfield Quarry has permission until 2033. Working at Clearwell Quarry is current suspended due to undetermined planning application awaiting a legal agreement. Drybrook Quarry was due to close in 2024 with the extant permission coming to an end. However, a new planning application is currently under consideration (24/0024/FDS73M).

Sand & Gravel
A majority of the county's permitted sand and gravel sites will end within the next ten years. Bedding sands sourced from the Sandstone working at Bromsberrow will be potentially available for a longer period, subject to the resolution of a ROMP application. Planning permission was granted at Bow Farm in 2024 (APP/T1600/W/23/3324695), it has condition that the site should be restored within 9 years from commencement.

Envisaged working schedules for individual sites
Many sites require phased working or progressive restoration schemes. This could potentially delay the ability to work and supply minerals, if sites are not able to be restored in the agreed timely fashion.
The presence of sales limitations at sites
Most mineral sites are subject to sales / output restrictions, usually in the interests of maintaining highway safety. As routes become congested, or less able and suitable to accommodate HGVs this matter could become a significant operational limiter for sites as they evolve over time.
A historic 70/30 supply trend pattern for crushed rock supplied from within the Forest of Dean and 30% from within the Cotswolds.
There is a longstanding supply trend for Gloucestershire's crushed rock related to the county's two distinct resource areas – the Forest of Dean and Cotswolds. The supply trend presents as a proportional split equal to 70% from the Forest of Dean and 30% from the Cotswolds. It reflects a difference in the local markets being served and the marketability of the type of aggregate materials being supplied. Whilst there have been periods of time where this trend has deviated, this is normally only within a range of + / - 5%. Furthermore, from a review of data collected over recent years, there is no evidence to suggest that a material change in this pattern of working has occurred. The difference is equal to around 8-10 years less of reserves being available from within the Forest of Dean resource area, than would be the case if the countywide land bank was applied. However, in contrast, for the Cotswold resource area, it represents a potential extension of the time for reserves being available that goes beyond the current plan period.
Competing demands for materials
A significant number of crushed rock quarries within Gloucestershire also have permission to supply crushed rock for non-aggregate purposes, including supply for industrial furnaces or for agricultural lime production. The proportion of crushed materials supplied for non-aggregate purposes can vary from year-to-year. As such this can have an impact on whether reserves are viewed by operators as aggregate or non-aggregate. This in combination with site re-appraisals can make landbanks seem significantly higher or lower than to a previous year, without any granting or ceasing of permissions. This is another reason for not relying solely on landbanks to determining the health of future local aggregate supplies.

4. Assessment of balance between supply and demand and overall conclusions

4.1. This section of the report assesses to what extent the factors discussed in the previous two sections could affect the demand for aggregates or the ability to meet that demand.

Assessment of Demand

Influence	Is this likely to affect demand over and above the 10-year sales average	Is the level of effect significant enough to justify new LAA rate
Comparison of 3- and 10-year sales averages	The three-year sales average is lower for both sand & gravel and crushed rock. This could be a result of the current economic climate. However, the crushed rock sales have been in overall decline since 2017. Sand & gravel figures have fluctuated significantly in the last ten years with both 2014 and 2023 being lower than even the pandemic affected years.	At this time, there is no evidence to suggest that the conventional LAA rate needs to be amended to accommodate any forecast expansion of sales.
Future local house building	The forecasted level of housing remains at a steady rate consisted with previous years and it is not anticipated that it would cause a greater demand for aggregates than can be accommodated by the existing LAA rate. This may change as result of recent ammendments to the NPPF.	There is no evidence to suggest that the LAA rate should be increased.
Local economic ambitions and other planned major strategically significant infrastructure projects	The 200,000+ tonnes required for the A417 missing link project could in theory be accommodated within the current landbank and supply infrastructure available from within Gloucestershire. Nearby quarries could in theory have supplied the project. However, material specification of materials is key and has dictated the origin of materials from further afield.	There is no evidence to suggest that the LAA rate should be increased.

	Insufficient information is known regarding materials requirements for other planned projects. However, the level and scale of projects is consistent with previous years, which have been accommodated within existing supply infrastructure.	
Forecast demand as established through National and Sub National Guidelines on future aggregates provision (2005 – 2020)	Sales in Gloucestershire have never achieved the figures contained within the national guidelines figures and the current figures have expired, making them less of an influence on the anticipated aggregates demand for Gloucestershire.	There is no evidence to suggest that the LAA rate should be increased.

Summary of Demand

Is a revised LAA rate required?	No, it is considered that the 10-year sales average continues to be the most appropriate forecasting method for Gloucestershire.

Assessment of Supply

Influence	Is this likely to affect ability to meet demand	Is the level of effect significant enough to require a revision of the MLP?
Landbank for crushed rock	At present the landbank more than meets the 10-year minimum requirement, but more permissions would be required to maintain a 10-year rolling landbank at the end of the current plan period (2032).	Not in the short term but may be dependent upon other factors and will be considered as part of the 5 year review of the MLP.
Landbank for sand and gravel	As of December 2023, the landbank was just below the 7-year minimum requirement. However, the Down Ampney permission has subsequently been	It is possible that new allocations maybe required to maintain the rolling

	granted which would take the landbank above the 7-year minimum requirement.	7 year landbank at the end of the plan period.
Supplies of recycled and secondary aggregates	The 2023 sales were broadly consistent with the previous year. However, the LAA rate remains the same. This is a positive that bolsters the availability of materials locally for construction and development projects.	Not presently but will need to be kept under review should supplies continue to increase.
Imports and exports	There appears to have been very little change in overall aggregate consumption and balance between imports and exports between the two survey years 2014 and 2019. Gloucestershire's overall aggregate supplies are locally orientated. Although, crushed rock supply has slightly shifted towards imports. An update on this from the National Survey 2023 has not been made available as of yet.	Not presently but will need to be kept under review.
Potential for marine won sand and gravel	There is no know potential for local marine won sand & gravel outside of historic import patterns. The 6000 tpa permitted in Sharpness Docks is not envisaged to have a significant impact.	Not presently but will need to be kept under review.
Productive capacities	There is significant concern that productive capacities cannot be met in the medium to long-term.	This is highly dependent upon other factors such as new proposals coming forward.
Additional permissions granted since January 2024	Permission was granted at the Former RAF Down Ampney Airfield, this would provide 6,500,000 tonnes (13 years) of sand and gravel. Alongside this permission was granted at Stubbs Farm of 17,000 tonnes of sand and gravel. Planning permission was granted via appeal at Bow Farm for 40,000 tonnes of sand and gravel.	No
Planning proposals for aggregate working still to be determined	Over 4mt of crushed rock in the Forest of Dean is yet to be determined. If these sites were permitted it would assist with concerns over supply in the medium to long term (Forest of Dean crushed rock). .	Not presently but will need to be kept under review.

Potential future aggregate supply from within allocations contained within the Minerals Local Plan for Gloucestershire (MLP) (2018-2032)	Proposals are in for two of the sites but concerns over two inactive crushed rock sites that have associated allocations which could affect longer term supply.	Potentially – and will be considered as part of the MLP Review in 2025
The number of and the continuation of inactive sites	This is a reasonable cause for concern particularly that two of the inactive sites are linked to proposed allocations within the minerals local plan.	Potentially – and will be considered as part of the MLP Review in 2025
Dormant Sites	The future of one site is now uncertain leaving negligible reserves in the remaining site. The sites are not included within landbank calculations.	Not presently but will need to be kept under review.
Restrictions upon the timescales for mineral working at individual sites	This could be a cause for concern, particularly with sites such as Drybrook Quarry which no longer has permission to complete the workings and is linked to an allocation for a potential extension to workings within the MLP.	Potentially – and will be considered as part of the MLP Review in 2025.
Envisaged working schedules for individual sites	This factor could potentially impact upon productive capacity, but it is not considered to be of more than a minor impact.	Not presently but will need to be kept under review.
The presence of sales limitations at sites	This could become an increasingly important factor when considered with time restrictions and where the availability of supply becomes ever-more concentrated in fewer and fewer sites.	Not presently but will need to be kept under review.
The historic 70/30 supply trend pattern for crushed rock supplied from within the Forest of Dean and 30% from within the Cotswolds.	Moving forward any change in resource area supply patterns could impact on overall supply. An increasing proportion of reserves are tied up in the Cotswolds where there are both more limitations on capacity and the end-uses of the material.	Potentially – and will be considered as part of the MLP Review in 2025.

Competing demands for materials	External supply demands could impact on local supplies. Gloucestershire has traditionally been an exporter of aggregate minerals in varying levels over time and new trends in supply may emerge. Current data does not suggest this is a growing issue.	Potentially – and will be considered as part of the MLP Review in 2025.

Summary of Supply

Does the MLP need to be reviewed?	A statutory review is required in 2025. This is a sufficient timeframe in which to consider the necessity for review of the plan’s strategy and policies based on mineral supply matters.

Overall conclusion
The means of forecast future demand for aggregate – using the conventional ten-year rolling sales average is deemed reasonable and appropriate at this time. However, there are concerns that the productive capacity and availability of local supply may not keep pace with forecast demand over the remainder of the plan period. While overall landbank figures suggest that sufficient resources are available, the distribution of crushed rock reserves is uneven. In particular, there is a clear need for new crushed rock permissions in the Forest of Dean resource area to maintain productive capacity in the short to medium term. In the longer term, additional permissions including for new or extended workings and expanded operations for both crushed rock and sand and gravel are likely to be required to ensure a steady and adequate supply. The MLP is subject to a statutory review in 2025. This could present an opportunity to explore positive policy options that favour maintaining security of supply including expanding capacity. However, this would need to be very carefully balanced against ensuring the highest standards of amenity and environment protections and any other wider strategic policy ambitions that may work counter to allowing local supplies to keep pace with demand.

Appendix 1 | Import supplies of aggregates to Gloucestershire during 2019

	As a % of Gloucestershire consumption		
Source Area	Land won S/G	Marine S/G	C/R
Brecon Beacons National Park			<1
Bridgend			<1
Bristol City Council		90-100	
Cambridgeshire County Council	<1		
Cardiff County Council		<1	
Central Bedfordshire Council	<1		
Derbyshire County Council			<1
Devon County Council			<1
Doncaster Metropolitan Borough Council			<1
Dorset Council	<1		
Hampshire County Council	<1		
Herefordshire	<1		1-10
Leicestershire County Council			<1
Merthyr Tydfil			<1
Neath Port Talbot			1-10
North Somerset Council			<1
Oxfordshire County Council	<1		<1
Portsmouth City Council		<1	
Powys			1-10
Rhondda, Cynon, Taf (Taff)			1-10
Shropshire Council			<1
Solihull Metropolitan Borough Council	<1		
Somerset			1-10
South Downs National Park	1-10%		
South Gloucestershire			30-40
Staffordshire County Council	<1		
Wiltshire Council	1-10		
Worcestershire County Council	1-10		

Appendix 2 | Gloucestershire Sand & gravel (export) destinations as a percentage of the destinations' total consumption

Export Destination	Export Destination consumption		Change from 2014
	As a % of total consumption	Total Consumption (mt)	
Wiltshire and Swindon	60-70	0.52	Increase from 10-20%
South East Wales	20-30	0.003	Increase from 0%
Cornwall and Isles of Silly	10-20	<1	Increase from 0%
Berkshire	1-10	0.74	Increase from <1%
Herefordshire	1-10	0.25	No change
Worcestershire	1-10	0.39	Increase from 0%
Bedfordshire (Central Bedfordshire, Bedford and Luton)	<1	1.54	Increase from 0%
Cambridgeshire and Peterborough	<1	2.80	Increase from 0%
Lancashire, Blackpool and Blackburn with Darwen	<1	0.23	Increase from 0%
Hampshire and the Isle of Wight	<1	0.95	Increase from 0%
Oxfordshire	<1	0.91	No change
Surrey	<1	0.37	Increase from 0%
Devon, Plymouth, Torbay and Dartmoor National Park	<1	0.40	Increase from 0%
Dorset	<1	0.73	Increase from 0%
Somerset and Exmoor National Park	<1	0.32	No change
Remainder of South Wales	<1	0.18	Increase from 0%
Warwickshire	<1	0.31	Increase from 0%

Appendix 3 | Gloucestershire crushed rock (export) destinations as a percentage of the destinations' total consumption

Export Destination	Export Destination consumption		Change from 2014
	As a % of total consumption	Total Consumption (mt)	
Oxfordshire	10-20	0.62	Increase from 0
Herefordshire	10-20	0.49	Increase from 1-10
Worcestershire	10-20	0.73	No change
West of England	1-10%	1.42	Increase from <1
South East Wales	1-10%	3.93	No change
Warwickshire	1-10%	1.07	No change
Cambridgeshire and Peterborough	<1	1.8	No change
Hertfordshire	<1	0.73	No change
Derbyshire and Peak District National Park	<1	4.75	No change
Northamptonshire	<1	1.65	No change
Scotland	<1	0.05	Increase from 0
Berkshire	<1	0.89	No change
Hampshire and the Isle of Wight	<1	0.69	No change
Kent and Medway	<1	2.53	No change
West Sussex	<1	0.56	No change
Devon, Plymouth, Torbay and Dartmoor National Park	<1	2.52	No change
Dorset	<1	0.29	No change
Somerset and Exmoor National Park	<1	7.11	No change
Wiltshire and Swindon	<1	0.96	No change
Remainder of South Wales	<1	1.44	No change
Shropshire and Telford and Wrekin	<1	2.53	No change
Remainder of West Midlands	<1	1.49	No change

Appendix 4 | Targeted technical engagement / fact-check of the 13th LAA

A draft version of the 13th LAA will be subject to a targeted technical engagement / fact-check for a period of four weeks in July 2025. Any comments received will be reviewed and where relevant factual amendments will be made to the document. The following organisations will be notified of the four-week period to provide comments: -

- Aggregate Industries UK Limited;
- Allstone Sand & Gravel Trading Company;
- Bath & North East Somerset Council
- Bedford Borough Council
- Blackburn with Darwen Borough Council
- Blackpool Borough Council
- Bracknell Forest Borough Council
- Brecon Beacons National Park Authority
- Breedon Aggregates;
- Bridgend County Borough Council
- Bristol City Council
- British Aggregates Association;
- British Geological Survey;
- Cambridgeshire County Council
- Cardiff County Council
- Central Bedfordshire Council
- Complete Utilities;
- Cornwall Council
- Cotswold Stone Quarries;
- Crown Estates;
- Dartmoor National Park Authority
- David Jarvis Associates Ltd;
- Derbyshire County Council;
- Devon County Council
- Doncaster Metropolitan Borough Council
- Dorset Council
- Elliott & Sons Ltd;
- Environment Agency;
- Exmoor National Park Authority
- Forest of Dean Stone Firms Ltd;
- GFirst LEP;
- H T Waste Recycling;
- Hampshire County Council;
- Heidelberg Materials UK
- Herefordshire Council;
- Hertfordshire County Council
- Hills Quarry Products;
- Isle of Wight Council
- Johnston Quarry Group;
- Kent County Council
- Keyway (Glos) Ltd;
- Lancashire County Council
- Land & Mineral Management;
- Leicestershire County Council
- Luton Borough Council
- Manufacturers of Incinerator Bottom Ash Aggregates Association
- Marine Management Organisation;
- Medway Council
- Merthyr Tydfil County Borough Council
- Mineral Products Association;
- Monmouthshire County Council;
- Moreton C Cullimore;
- Neath Port Talbot County Borough Council
- North Northamptonshire Council
- North Somerset Council
- Oxfordshire County Council;
- Peak District National Park Authority
- Peterborough City Council
- Plymouth City Council
- Portsmouth City Council
- Powys County Council
- Reading Borough Council
- Rhondda, Cynon, Taf County Borough Council
- Shropshire Council
- Slough Borough Council
- Smiths (Gloucester) Ltd;
- Solihull Metropolitan Borough Council
- Somerset County Council
- South Downs National Park Authority
- South East of England Aggregates Working Party;
- South Gloucestershire Council;
- South Wales Aggregates Working Party;
- South West Aggregates Working Party;
- Staffordshire County Council;
- Stone Supplies (Cotswold) Ltd;
- Surrey County Council
- Swindon Borough Council;
- Tarmac Trading Ltd;
- Telford and Wrekin Council
- Torbay Council
- Urbaser-Balfour Beatty;
- Valley Trading Ltd;
- Warwickshire County Council;
- West Berkshire Council
- West Midlands Aggregates Working Party;
- West Northamptonshire Council
- West Sussex County Council
- Wiltshire Council;
- Windsor and Maidenhead Borough Council
- Wokingham Borough Council
- Worcestershire County Council