

# Local Aggregate Assessment 2025



## LOCAL AGGREGATE ASSESSMENT 2025

DERBYSHIRE COUNTY COUNCIL, DERBY  
CITY COUNCIL AND THE PEAK DISTRICT  
NATIONAL PARK AUTHORITY



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*Cover photo: Shardlow Quarry, Weston on Trent*

## SUMMARY

The National Planning Policy Framework (NPPF) requires Mineral Planning Authorities (MPAs) to plan for a steady and adequate supply of aggregates by preparing a Local Aggregates Assessment (LAA). The LAA is required to:

- forecast the demand for aggregates based on average 10-year sales data and other relevant local information;
- analyse all aggregate supply options; and
- assess the balance between demand and supply.

This LAA is the 2025 edition and includes the 2024 aggregate sales and reserves data for Derbyshire, Derby and the Peak District National Park. The ten-year period covered by this LAA is 2015 to 2024. The main facts and figures from the report (by aggregate type) are set out below.

### Sand and Gravel

- Derbyshire is an important producer of sand and gravel and has a large export market, particularly the wider East Midlands.
- Derbyshire has four permitted sand and gravel quarries, three in the river valleys and one in the Sherwood Sandstones, producing 0.85 million tonnes in 2024. The total reserves at these sites, as of 31 December 2024, is around 5.77 million tonnes (Mt).
- Sand and gravel sales remained fairly steady until 2020 when sales were impacted by the COVID pandemic and issues with flooding along the River Trent, before recovering again from 2021 onwards to pre-pandemic levels.
- In 2023<sup>1</sup> (the most recent data) 0.310 Mt (38%) of sand and gravel which was produced in Derbyshire was exported to other areas outside Derbyshire, Derby and the PDNP. 2023<sup>2</sup> figures (the most recent for this dataset) show 0.37 Mt of sand and gravel was imported to Derbyshire, making the county a net importer of sand and gravel.
- The average aggregate sales for sand and gravel for the most recent ten-year period (2015–2024) and three-year period (2022–2024) are 0.96 million

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<sup>1</sup> [Local Aggregate Assessment \(LAA\)](#)

<sup>2</sup> [Collation of the Results of the 2023 Aggregate Minerals Survey for Great Britain](#)

tonnes per annum (Mtpa) and 0.95 Mtpa respectively. The provision rate for sand and gravel is set at 0.96Mtpa. Based on this provision rate, there are sufficient permitted reserves to maintain supply for just over 6 years, i.e. below the required landbank length of at least seven years. There is therefore an urgent for new sand and gravel reserves to maintain a steady and adequate supply. Additional reserves are identified in the emerging Minerals Local Plan to maintain supply over the Plan period to 2038. It is expected that some of these sites will have planning permission before the Plan is adopted, ensuring that the landbank is increased.

### **Crushed Rock for Aggregate**

- Derbyshire and the Peak District National Park are nationally important producers of aggregate crushed rock, with the product being exported over a large area of the UK.
- Derbyshire and the Peak District have 26 permitted crushed rock (limestone, and sandstone) quarries, 19 of which are currently operational. These produced 16.78mt of aggregate grade crushed rock in 2024. The total reserves of aggregate crushed rock at these operational sites, at 31 December 2024, is around 500.97mt. Reserves of aggregate at the 7 currently non-operational sites is 223.4mt.
- Production of aggregate increased in the PDNP from 2015 and then remained consistent until it declined in 2020 and 2022, since which it has begun to recover. In Derbyshire, production of aggregate crushed rock was at a lower level in 2015, with a significant recovery from 2016 to 2019 before falling again in 2020 and recovering to pre-pandemic levels since 2021. Since 2021 there has been a significant increase in production.
- In 2023 (the most recent data) 7,436,823 tonnes (61%) of crushed rock which was produced in Derbyshire and the Peak District was exported to other areas, the main destinations being the West Midlands, North West, South East, East of England regions and the other areas within the East Midlands. In 2023 (the most recent data), Derbyshire and the Peak District imported 582,000 tonnes of aggregate grade crushed rock, the majority of which was imported from Leicestershire/Rutland. The area is, therefore, a significant exporter of crushed rock aggregate to a number of regions across the UK.

- Average aggregate sales for crushed rock for the most recent ten-year period (2015–2024) and three-year period (2022–2024), are 12.68 Mtpa and 15.12 Mtpa respectively. The provision rate is set at 15.12mtpa (12.28mtpa for Derbyshire and 2.83mtpa for the PDNP). Based on this provision rate there are sufficient permitted reserves to maintain production for approx. 48 years, significantly more than the government required minimum ten-year landbank. Although it is noted that all these permissions expire by 2042 or before so extensions of time at existing sites or new permissions will be needed before then in order to maintain a steady and adequate supply of crushed rock.

## Secondary and Recycled Aggregate

- It is estimated that from 2025 to 2038, Derby and Derbyshire will produce around 3 million tonnes of recycled aggregate on an annual basis.

Table 1: Summary sales figures for the period 01/01/2024 – 31/12/2024

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	0.85	↓	0.96	0.95	↑	0.96	5.77	↓	6.04	↓
Crushed Rock	16.78	↑	12.68	15.12	↑	15.12	694.34	↓	48	↓
Marine sand and gravel	nil									
Total Primary Aggregates	17.63	↑	13,6	16.07	↑					
Secondary Aggregates	No data available	No data available	No data available	No data available	No data available	No data available	No data available	No data available	No data available	No data available
Recycled Aggregates	No data available	No data available	No data available	No data available	No data available	No data available	No data available	No data available	No data available	No data available

# 1. INTRODUCTION

Minerals are important to the local and national economy and play an important part in our everyday lives. They have many uses, including material for construction and for a wide variety of industrial and commercial purposes, including the manufacture of paint, paper and toothpaste. The planning system must ensure that sites are available to provide a steady and adequate supply of minerals for these industries.

Aggregate minerals are those that are used by the construction industry, for example in road making, house construction, in the manufacture of concrete and as railway ballast. They include limestone, sandstone and sand & gravel. It is the future provision of these minerals with which this assessment is concerned.

## **Background**

The National Planning Policy Framework (NPPF) requires Mineral Planning Authorities (MPAs) to plan for a steady and adequate supply of aggregates by determining provision through the preparation of an annual Local Aggregate Assessment (LAA). It sets out that this should be prepared either individually or jointly by agreement with another or other mineral planning authorities, based on a rolling average of 10 years sales data and other relevant local information, and an assessment of all supply options (including marine dredged, secondary and recycled sources). It is advised also that published National and Sub National Guidelines on future provision should also be taken into account. Planning Practice Guidance elaborates further, setting out that it should also assess the balance between demand and supply, and the economic and environmental opportunities and constraints that might influence the situation. It should conclude if there is a shortage or surplus of supply and, if it is the former, how this will be addressed.

It also seeks to ensure that, as far as is practicable, landbanks of non-energy minerals should be maintained in locations outside National Parks, Areas of Outstanding Natural Beauty (AONBs), World Heritage Sites, Scheduled Monuments and Conservation Areas. As a result, future contributions of aggregate from areas covered by these designations, including the Peak District National Park, will need to be considered in light of this.

Guidance on the preparation of LAAs<sup>3</sup> reinforces the above policy requirements and sets out also that MPAs should look at the average 3-year sales in particular, to identify the general trend of demand as part of the consideration of whether it might be appropriate to increase mineral supply.

Derbyshire County Council, Derby City Council and the Peak District National Park Authority (PDNPA) have agreed to undertake a joint Local Aggregate Assessment. Government Guidance on preparing LAAs suggests that joint LAAs may be prepared where joint planning is taking place. Justification for the preparation of a LAA on a joint basis between Derbyshire and the PDNPA lies in the known interactions in terms of aggregates production and consumption within this area and the perceived benefits of closer cooperation on minerals planning within the area.

This assessment sets out the current and future situation in Derbyshire, Derby and the PDNP with regard to all aspects of aggregate supply, in particular, setting out the amount of land-won aggregate that the area will need to provide. It follows the Practice Guidance on the Production and Use of Local Aggregate Assessments produced by the Planning Officers Society and Mineral Products Association.

Derby does not produce any crushed rock or sand and gravel, but it is an important consumer of these minerals. **Unless otherwise stated, data on Derbyshire, including sales and movements of aggregate, incorporates information on Derby City.**

The LAA is submitted to the Aggregates Working Party (AWP), an advisory body made up of MPAs and mineral operators across the region, for consideration and scrutiny.

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<sup>3</sup> Practice Guidance on the Production and Use of Local Aggregate Assessments; Planning Officers Society and Mineral Products Association (May 2017).

The AWP has a role to monitor the operation of the LAA system through providing technical advice, particularly on the apportionment of aggregate supply provision.

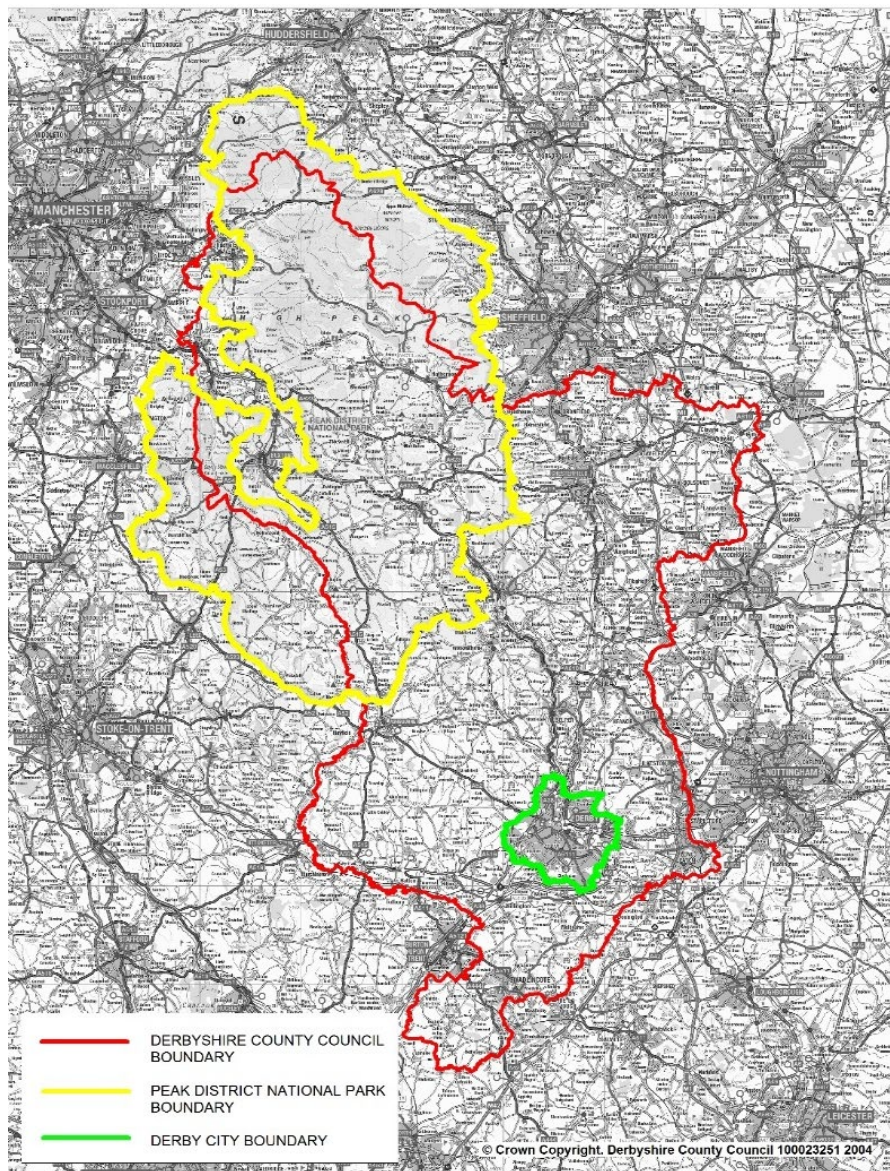
The work of MPAs and AWPs across the country will be overseen by a National Aggregate Co-ordinating Group (NACG), the main role of which will be to monitor the overall provision of aggregates in England and provide advice to AWPs and the Government.

**The latest survey information is from the calendar year 2024, and it is these figures on which this assessment is based. This information will continue to be updated on an annual basis.**

### **Spatial Context**

Derbyshire and the Peak District National Park are situated in the central part of England, mostly within the East Midlands region. The large conurbations of Nottingham, Sheffield, the North West and the West Midlands lie in close proximity to the area.

**Figure 1: Derbyshire, Derby and the Peak District National Park**



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Derbyshire and Derby have a population of around 1,056,000<sup>4</sup>. The majority of the population of Derbyshire and Derby live in urban areas, with around three quarters living in settlements in the eastern half of the county. The largest settlements are Derby in the south and Chesterfield in the north. There are around 460,000 households<sup>5</sup> in Derbyshire and Derby. By 2032, it is estimated that the population of

<sup>4</sup> [2021 Census and includes the area of Derbyshire within the Peak District which is around 30,000 \(around 7,000 people live in the area of the National Park outside Derbyshire\)](#)

<sup>5</sup> [2021 Census Infographic v6\\_DerbyshireDerby V1.00.png \(1654×2339\)](#)

the area will have increased to 1,130,897<sup>6</sup>, an increase of 7%. It is estimated that there will be a further approx. 50,000 households by 2032<sup>7</sup>, the largest increases expected to be in South Derbyshire, Amber Valley, Bolsover and North East Derbyshire. This population growth, in turn, will create the need for further employment opportunities and improvements in infrastructure.

As such, it is crucial that Derby City and Derbyshire County Councils and the PDNPA, as the MPAs for the area, are able to ensure a steady and adequate supply of mineral to realise these growth aims and to maintain the infrastructure already developed.

Mineral supply from the area is of national significance, supplying a significant amount of aggregate to a large part of the country, particularly crushed rock for aggregate. As a result, this need to maintain a steady and adequate supply of mineral applies also to this much wider area.

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<sup>6</sup> [Population projections for local authorities by single year of age and sex, England - Office for National Statistics](#)

<sup>7</sup> [Household projections for England - Office for National Statistics](#)

## 2. AGGREGATE RESOURCES

### Primary Aggregates

The geology of Derbyshire, Derby and the Peak District National Park gives rise to the following commercially viable primary aggregate deposits:

- Hard rock, including limestone and sandstone/gritstone
- Alluvial sand and gravel (river valleys)
- Sherwood Sandstones

For centuries, the rich geology of Derbyshire, Derby and the Peak District National Park has encouraged the search for workable minerals. **The principal sources of Limestones and Sandstones/Gritstones** were formed during the Carboniferous, Permian and Triassic Periods, between 354 and 200 million years ago. Most of the National Park and the northern part of Derbyshire is underlain by limestone and gritstone from the Carboniferous period.

The principal sources of Carboniferous limestones, which are worked in Derbyshire and the Peak District National Park are found mainly in an area which stretches from Buxton, in a south easterly direction through the southern half of the National Park, towards the Matlock and Wirksworth/Cromford area. This rock provides a valuable and important raw material which is used in crushed form, both as high grade aggregate for concrete making and roadstone (where the physical properties of certain deposits are important) and for industrial purposes (as a result of the chemical composition of certain deposits).

The Permian Limestone was formed slightly more recently, around 250 million years ago. This is found and worked in the north east of the county, in the area around Bolsover and Whitwell in the north east of the county. In terms of its use for aggregates, it is a lower grade material than the Carboniferous Limestone and is used principally as constructional fill. The specific chemical content of the resource in certain areas, particularly around Whitwell, makes it an important raw material for high quality industrial products.

Whilst total resources of sandstone and gritstone within Derbyshire and the Peak District National Park are large, the quantity and, in particular, the quality of the limestone in the area means that the focus for aggregate production is on limestone rather than sandstone and gritstone. Relatively small amounts of sandstone/gritstone are quarried for aggregate in the north west of the area, around Glossop and Hayfield. The more extensive use of this mineral is for building stone.

**The river valley sand and gravels** were laid down much more recently, at the end of the last ice age (around 14,000 years ago).

Derbyshire has substantial resources of sand and gravel in the river valleys of the Trent, Lower Derwent and Lower Dove, occurring within the fluvial/alluvial and terrace deposits, as shown on Figure 2 below. The thickness of the river valley deposits varies considerably, ranging from less than one metre thickness in some areas to eight or nine metres thick in other areas. The gravel content of the deposits is usually high (50%-70%), the remainder being sand and fine silts. The majority of working to date has taken place in the Trent and the Lower Derwent Valleys, with reserves being of particularly high quality in the area of the Trent Valley between Long Eaton and Willington.

Deposits of sand and gravel also occur in the solid bedrock of the **Sherwood Sandstones**. These are much older than the river valley deposits, having been laid down around 230 million years ago in the Triassic period. Their thickness varies considerably from 100m to virtually nothing. The proportion of gravel to sand varies greatly but is usually much less than in the river valley deposits. It is a source of soft building sand and also sharp sand for concrete. There is currently only one operation in the county. This is located at Mercaston in an area between Derby and Ashbourne.

Derby City has only limited mineral resources. There is no hard rock and only a small amount of sand and gravel.

## **Secondary and Recycled Aggregates**

Along with primary aggregate, described as minerals which are extracted directly from the ground, there are also secondary and recycled aggregates, the use of which can help to reduce the need for primary aggregates. Recycled aggregates are those derived mainly from construction and demolition projects. Examples include the re-use of brick and concrete, being reprocessed to be used in new developments, rather than being disposed of in a landfill site. This often takes place using mobile plants on redevelopment sites. Secondary aggregates are created as a by-product of a construction or industrial process. Examples include power station ash resulting from combustion, which can be used in the production of bricks and cement.

The benefits of maximising the use of both secondary and recycled aggregate are two-fold. Firstly, the use of these aggregates reduces the need to extract primary material in the first instance, leading to a reduction in the need for new quarries. Secondly, the re-use of material reduces the amount of waste that needs to be disposed of, thereby reducing the need for landfill sites. Such a reduction in the need for quarry and landfill sites has clear environmental and social benefits.

### 3. ASSESSMENT OF LOCAL RESOURCES, RESERVES AND PRODUCTION

#### Sand & Gravel

##### Resources and Reserves

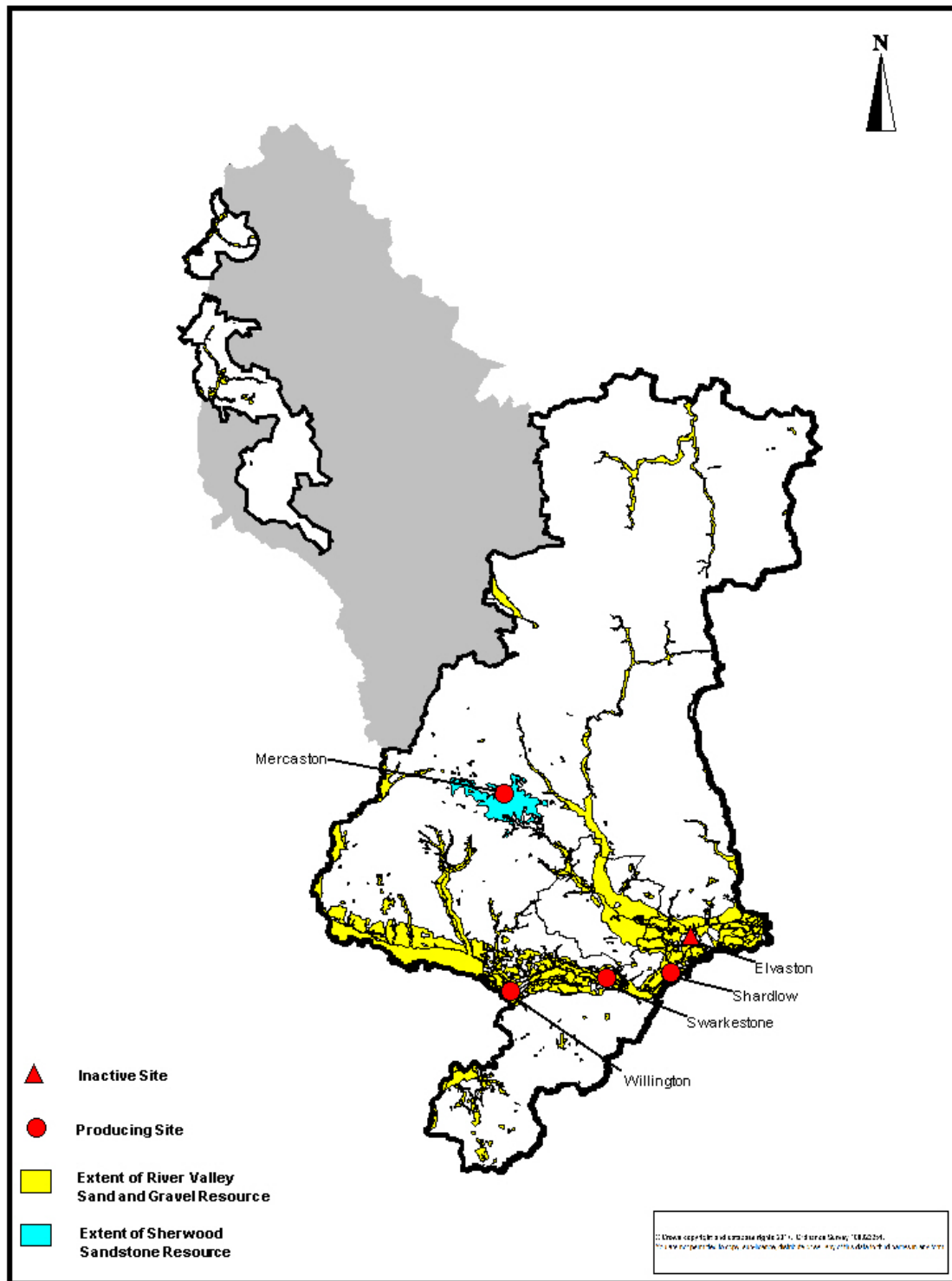
Sand and gravel resources of glacio-fluvial origin are concentrated along the river valleys in the south of the county, the most important being the Trent Valley to the south of Derby, as well as the adjoining river valleys of the Lower Derwent and Dove. Currently, the mineral is only worked in the Trent Valley in Derbyshire. Deposits of sand and gravel also occur in the solid bedrock of the Sherwood Sandstones. There are no resources of sand and gravel in the Peak District National Park.

In 2024, there were four operational operations producing sand and gravel; three along the Trent Valley (Glacio-fluvial deposits) and one at Mercaston (Sherwood Sandstone). One site (Elvaston) remains non-operational. Returns from the mineral operators show that the landbank is spread fairly evenly amongst the sites. It is clear from the information in Table 2 below that the current sites will not sustain production over the full course of the Plan period to 2038 and with the landbank already below the minimum requirement of 7 years there is an urgent need now for new sand and gravel reserves to maintain an adequate and steady supply. Further sites have been identified through work on the emerging Minerals Local Plan and will be brought forward to sustain production over this time to ensure that the agreed annual requirement continues to be met.

**Table 2: Permitted Sand and Gravel Quarries in Derbyshire**

Quarry	Operator	Status/End date
Swarkestone	Tarmac	Operational. Estimated lifespan 7 years to 2032
Shardlow	Heidelberg Materials	Operational. Estimated lifespan 6 years to 2031.
Willington	Cemex	Operational. Estimated lifespan 3 year to 2027
Mercaston	Heidelberg Materials	Operational. Estimated lifespan, 3 years
Elvaston	Tarmac	Not currently being worked.

**Figure 2: Sand and Gravel Resources in Derbyshire with Sand and Gravel Sites**



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At the end of 2024, estimated permitted reserves of sand and gravel in Derby and Derbyshire from the above quarries amounted to around 5.8 million tonnes.

This stock of reserves with planning permission is known as the landbank. The landbank includes operational quarries and also non-operational quarries but only those which have valid conditions for working. Government policy requires landbanks to be maintained for all aggregate minerals, with the landbank for sand and gravel required to be at least 7 years. The length of the landbank for sand and gravel in Derbyshire at the end of 2024 (using the proposed provision rate figure) is calculated as follows:

Landbank of permissions	=	5.8 million tonnes
Annual Provision rate	=	0.96 million tonnes
Landbank period	=	6.04 years

### Recent Production

Sales of primary sand and gravel originating from Derbyshire are shown in the table below.

**Table 3: Sales of Sand and Gravel in Derbyshire 2015-2024<sup>8</sup> (million tonnes)**

2015	2016	2017	2018	2019	2020	2021	2022	2023	2024
1.13	1.29	0.94	1.05	0.78	0.57	0.99	1.19	0.82	0.85

**Table 4: Use of sand and gravel 2024 (figures in tonnes)**

Building Sand	Sand for Concrete making	Gravel for Concrete making	Other screened and graded	Other uses for sand & gravel including fill
19,234	172,474	251,149	61,031	348,791

Table 4 above shows what the material was used for in 2024.

The figures in Table 3 show that production has averaged 0.96 million tonnes over the 10-year period 2015-2024. The figures indicate a gradual but intermittent recovery in production after the recession of 2008-2013 affected production levels. This pattern mirrors broadly that of the whole East Midlands Region. More recent production levels

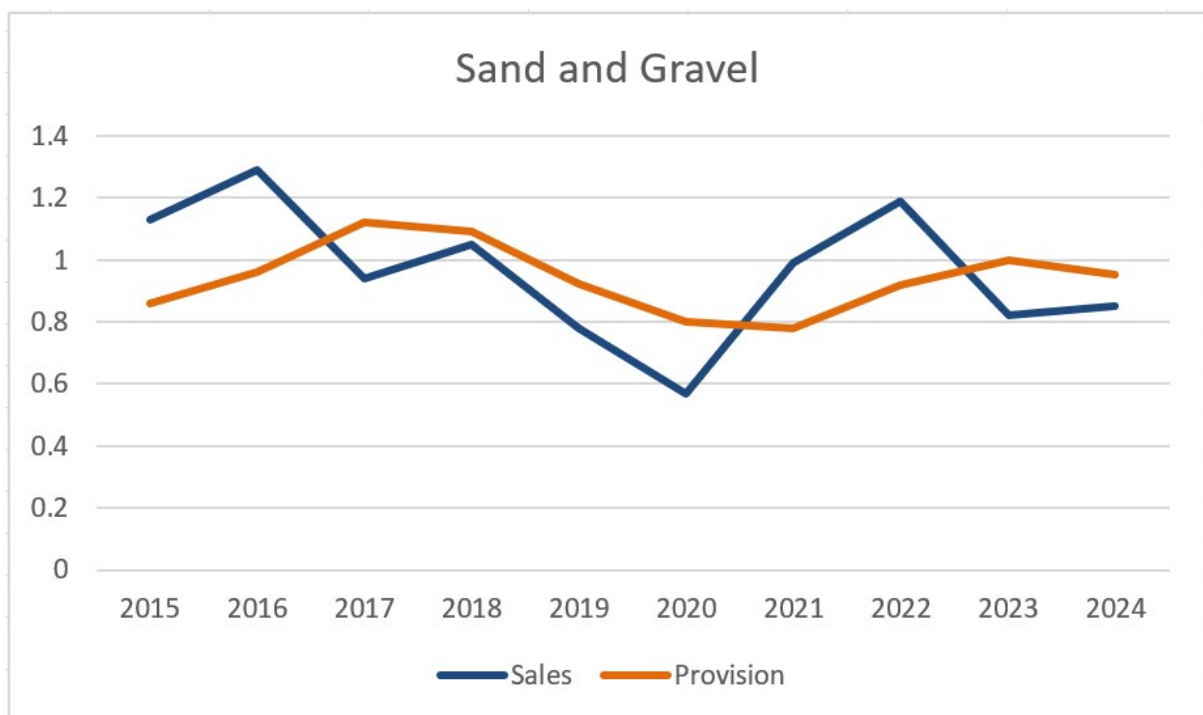
<sup>8</sup> Source: Annual Monitoring Surveys

have been affected by the Covid 19 Pandemic of 2020, as well as exceptional flooding in the Trent Valley area.

For the most recent 3 years (2022-2024), production of sand and gravel has averaged 0.95 million tonnes in Derbyshire. This figure will be monitored on an annual basis to highlight recent changes in production and the Councils will respond to any significant changes which come to light.

The graph below shows sales of sand and gravel against the county's provision rate for the period. Throughout most of this period, sand and gravel sales have not met the level of provision, generally being around 200,000 to 300,000 tonnes below the agreed provision rate. This is likely to be as a result of a decline in production, rather than a decline in sales or demand. In 2015 and 2016, sales moved slightly higher than the provision rate, before dropping again slightly between 2017 and 2020 and recovering in 2021 and 2022 before dropping again slightly in 2023 and 2024.

**Figure 3: Sales of Sand & Gravel 2015-2024 against past and current provision rate (figures in million tonnes)**



## **Crushed Rock**

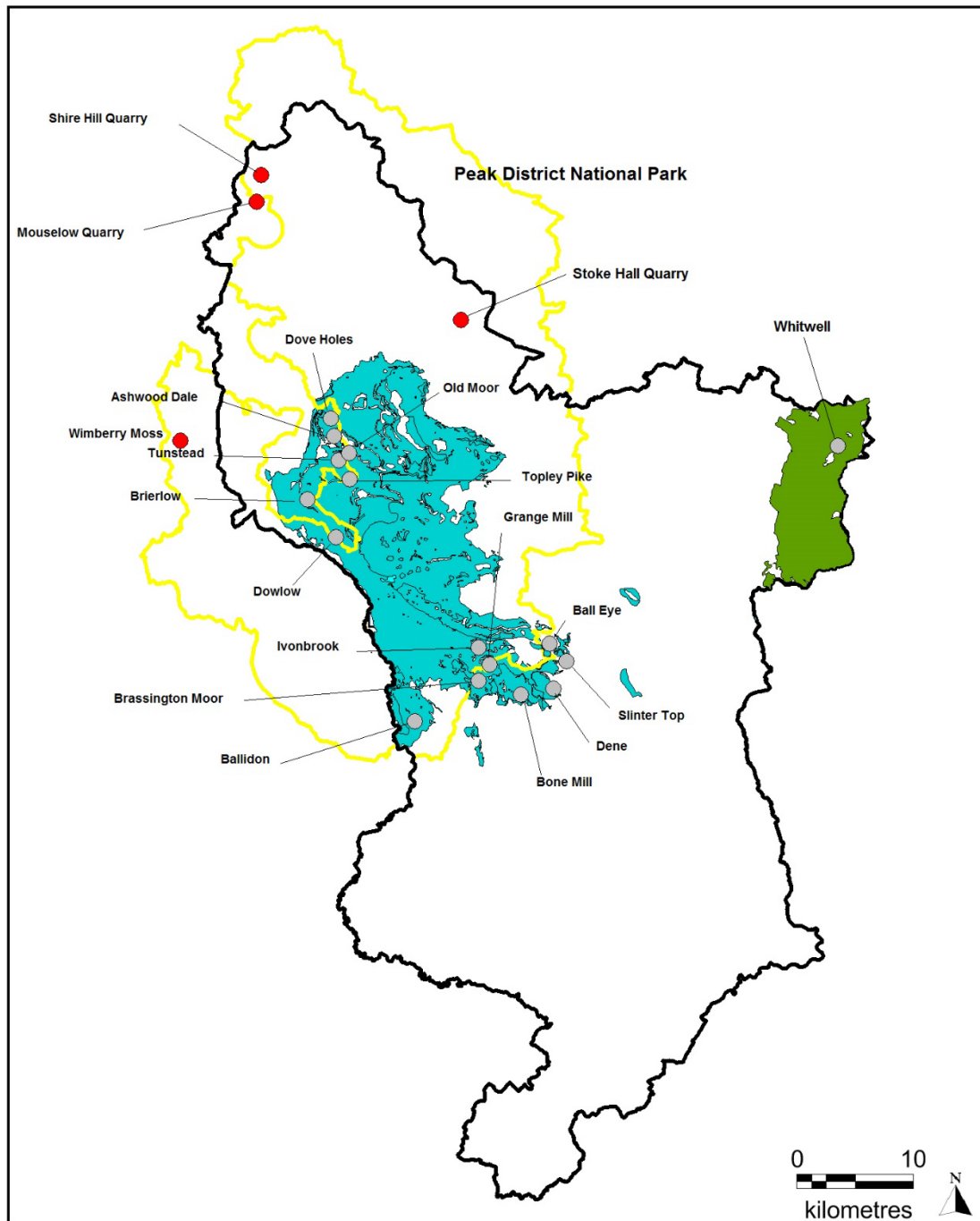
### **Resources and Reserves**

Derbyshire and the PDNP is one of the largest producers of aggregate grade crushed rock in this country. Crushed rock for aggregate is supplied from Derbyshire and the PDNP, most significantly from the Carboniferous Limestone, to most areas within the UK. It is considered, therefore, to be a resource of national significance. Quarries within the area covered by the two authorities supplied 16.78 million tonnes of aggregate grade crushed rock in 2024.

Relatively small amounts of gritstone aggregate are quarried from Mouselow Quarry in the north west of Derbyshire and from the Peak District National Park at Shire Hill Quarry, near Glossop.

In 2024, there were a total of nineteen quarries producing aggregate from crushed rock in the area, fourteen of these exploiting the Carboniferous Limestone resource, one working the Permian Limestone resource and four sandstone/gritstone quarries. Those marked with a (i) in Table 4 below extract limestone for the industrial market as their principal product but also produce significant quantities of limestone for use as aggregate.

**Figure 4: Hard Rock Resources and Active Hard Rock Quarries producing aggregate in Derbyshire and the Peak District National Park 2024**



**Title:**  
 Hard Rock Resources and Active Hard Rock Quarries within the plan area producing Aggregate in Derbyshire. (Note the Plan area covers the geographical county of Derbyshire excluding the Peak District National Park.)

Key	
	Limestone Producing site
	Sandstone Producing site
	Extent of Surface Carboniferous Limestone Resource
	Extent of Surface Permian Limestone Resource

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**Table 5: Operational Hard Rock Quarries currently producing Aggregate in Derbyshire and the Peak District (Total reserves 501 million tonnes)**

<b>Quarry</b>	<b>Operator</b>	<b>Aggregate</b>	<b>End Date</b>
<b>Derbyshire Quarries</b>	-	-	-
Ashwood Dale, Buxton (i)	Breedon	Limestone	2042
Hindlow Quarry, Buxton	Tarmac	Limestone	2042
Brierlow Quarry, Buxton (i)	Lhoist	Limestone	2042
*Dove Holes Quarry, Buxton (Beelow Quarry)	Cemex	Limestone	2042
Dowlow Quarry, Buxton (i)	Breedon	Limestone	2042
Dene Quarry, Cromford	Tarmac	Limestone	2042
*Tunstead Quarry, Buxton (i) (Old Moor Quarry)	Tarmac	Limestone	2042
Slinter Top Quarry, Cromford	Slinter Mining Co.	Limestone	2031
Bone Mill Quarry, Cromford	Longcliffe Quarries	Limestone	2042
Grange Mill Quarry, Cromford (i)	Ben Bennett Jnr.	Limestone	2042
Longcliffe Quarry, Longcliffe (i)	Longcliffe Quarries	Limestone	2042
Whitwell Quarry, Bolsover (i)	Tarmac	Limestone	2025
Glossop Quarry (Mouselow)	Wienerberger	Sandstone	2042
<b>Peak District National Park Quarries</b>	-	-	-
Ballidon Quarry, Parwich	Tarmac	Limestone	31/12/2035
*Old Moor Quarry, Buxton (i)	Tarmac	Limestone	31/1/2040

Topley Pike Quarry, Buxton	Aggregate Industries	Limestone	21/2/2025
Stoke Hall Quarry, Grindleford	Stoke Stoneworks Ltd	Gritstone	21/02/2042
Wimberry Moss Quarry, Rainow, Cheshire	Quarry Bros Limited	Gritstone	21/02/2042
Shire Hill Quarry, Glossop	Marchington Stone	Gritstone	21/02/2042

The following sites have permitted reserves but currently are not working.

**Table 6: Permitted Hard Rock Aggregate Quarries in Derbyshire and the Peak District National Park currently not in production (total reserves 223.44million tonnes)**

Quarry	Operator	Aggregate	End date
<b>Derbyshire Quarries</b>	-	-	-
Ball Eye Quarry, Cromford	Enviro Trac Ltd	Limestone	2042
Hayfield Quarry		Sandstone	2042
Middle Peak Quarry, Wirksworth	Tarmac	Limestone	2042
*Hillhead Quarry, Buxton	Tarmac	Limestone	2042
Bolsover Moor, Bolsover	Tarmac	Limestone	2023 (under review)
Hall Dale Quarry		Sandstone	
<b>Peak District National Park Quarries</b>	-	-	-
*Beelow Quarry, Buxton (Dove Holes)	Cemex	Limestone	2042

\* Cross boundary quarries (associated quarry in brackets)

(i) extract limestone for the industrial market as their principal product but also produce quantities of limestone for use as aggregate.

These tables show that there is a good spread of sites amongst a number of operators and indicate that, although some of the sites have larger reserves than others, particularly in the Buxton area where the most significant resources are found, the landbank is not bound up in a small number of sites to an extent where it could stifle competition and disrupt supply. It also indicates that the majority of the sites are likely to continue to operate throughout the Plan period, therefore ensuring continuity of supply. A schedule of productive capacity is being compiled to support the DCC Minerals Local Plan and the PDNPA Local Plan Review in order to demonstrate this. The number of sites, reserves available and the operational capacity of the sites means that there is sufficient flexibility to meet upturns in demand for the resource. However, all the sites have permissions that expire by 2042 or before so extensions of time at existing sites or new permissions will be needed before then in order to maintain a steady and adequate supply of crushed rock.

The overall landbank of crushed rock in the area, i.e. aggregate and industrial grade, is around 973.9 million tonnes (797.9mt in DCC and 176.0mt in the PDNP). In 2024, sales across Derbyshire and the PDNP were divided approximately 70:30 between aggregate and industrial-grade products, respectively. It has been estimated that of this, 249.5 million tonnes is of industrial (non-aggregate) grade. (184.1 million tonnes in DCC and 65.4 million tonnes in the PDNP). As a result, there is an estimated reserve of rock for aggregate use at these operational and non-operational sites of around 724.4 million tonnes (613.8mt in DCC and 110.6mt in the PDNP). This would be sufficient for around 48 years provision based on the proposed provision rate of 15.12mtpa. The required landbank for aggregate crushed rock is at least 10 years. (The landbank excludes dormant sites. These are where no minerals development may be carried out lawfully until such time as a new scheme of conditions has been submitted to, and approved by, the mineral planning authority.)

Reserves of crushed rock for aggregate at active sites within the DCC area are 390.7mt and 110.3mt within the PDNP; 501mt in total. Sales from active sites in 2024 were 16.78mt (13.73mt in DCC and 3.05mt in PDNP). At current production rates, these reserves would last for around 33 years, subject to the 2042 issue noted above.

## Recent Production

The average annual sales figure for the 10-year period 2015 to 2024 is 12.68 million tonnes. This figure comprises 9.49mt for Derbyshire and 3.19mt for the PDNP. For the most recent three years (2022-2024), production of crushed rock in Derbyshire and the Peak District has averaged 15.12 million tonnes (12.28 for DCC and 2.83 for the Peak Park). Production of aggregate in the PDNP increased in 2016 and stayed steady until a dip in 2020. This dip occurred again in 2022 but since then has returned closer to the average rate. In Derbyshire, production of aggregate crushed rock was at a relatively low level in 2015, with a significant recovery from 2016 to 2019 before falling in 2020 (Covid) and increasing back to pre-Covid levels from 2021. Since 2021 there has been a significant increase in production, as shown in Table 7 below.

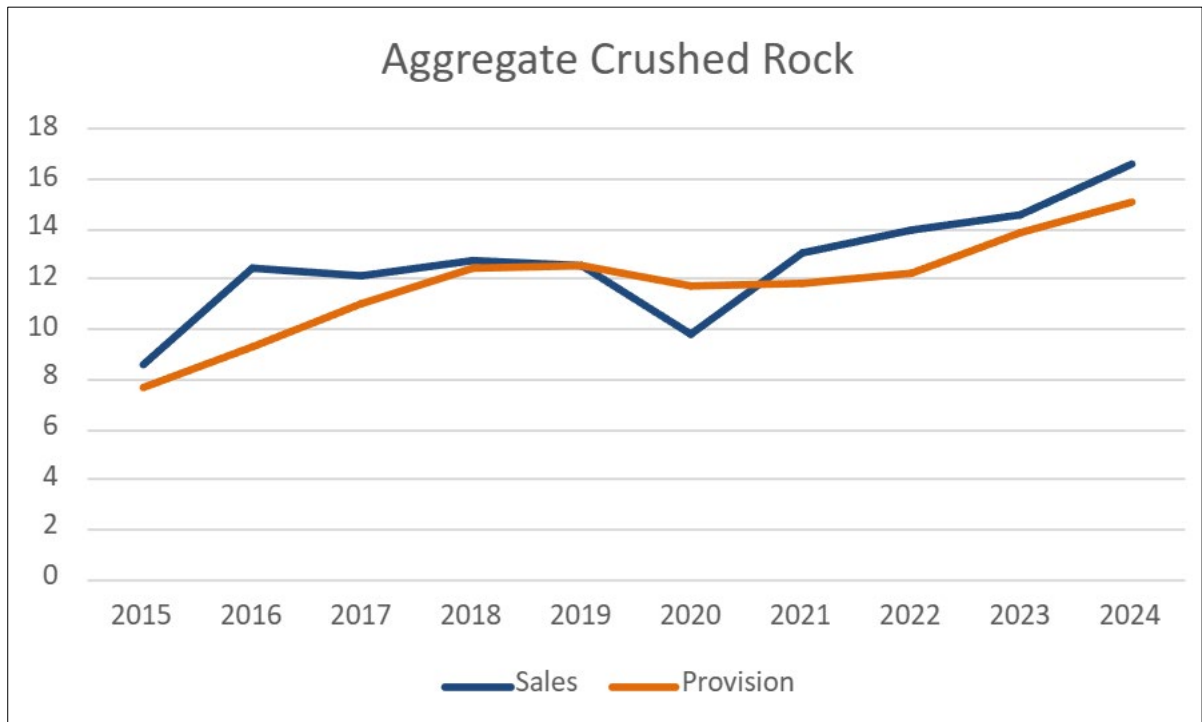
**Table 7: Sales of Aggregate Crushed Rock 2015-2024 (million tonnes)**

Year	2015	2016	2017	2018	2019	2020	2021	2022	2023	2024
<b>DCC</b>	5.77	8.62	8.86	9.25	9.19	7.23	9.14	11.45	11.67	13.73
<b>PDNP</b>	2.83	3.81	3.32	3.55	3.36	2.60	3.93	2.53	2.92	3.05
<b>Joint</b>	8.60	12.42	12.18	12.80	12.55	9.83	13.07	13.98	14.59	16.78

**Table 8: How Aggregate Crushed Rock produced in the area is used, 2024  
(Figures in tonnes)**

Roadstone /Asphalt	Concrete Aggregate	Other screened, graded aggregate	Construction fill	Armou rstone	Unknown	Total
7,363,337	2,353,250	4,022,783	2,327,460	5,271	468	16,072,569

**Figure 5: Sales of Aggregate Crushed Rock 2015-2024, against provision rate (figures in million tonnes)**



## **Secondary and Recycled Aggregates**

Information on secondary and recycled material that arises in Derby and Derbyshire is often inconsistent and unreliable. This is particularly true for secondary aggregates for which no throughput figures exist. Aggregates from secondary sources have diminished with the demise of heavy industry e.g., steel manufacturing and coal mining.

Recycling of construction and demolition waste (and hence the production of recycled aggregate) is often dealt with at temporary sites and sites exempt from permitting by the Environment Agency and hence good quality data on locations of production and amounts produced is not available. Additionally, a large and unknown proportion of this material is often re-used or recycled on site, and therefore does not enter the waste stream, making it difficult to record. Due to the rural setting and limited development taking place in the PDNP, no significant quantities of secondary and recycled material arise from this area.

In order to attempt to estimate arisings for recycled aggregates, we have to use national and regional surveys that are carried out only periodically. This data then has to be extrapolated to the local level. Although information about this waste stream is relatively poor, some estimates do exist. Nationally, it is estimated that recycled aggregates currently make up around 25% of aggregate use.

The extensive and detailed work to produce the National and Sub National aggregate apportionment figures for the period 2005-2020 took account of the capacity of facilities to provide recycled and secondary aggregates. These proposed that the East Midlands region should provide 110 million tonnes of alternative aggregate materials between 2005 and 2020, equating to 6.8 million tonnes per annum. This is equivalent to 14% of the region's total aggregate supply, so the use of recycled and secondary aggregate is expected to be a significant feature of mineral supply. There is, however, no provision of the 110mt figure to individual Mineral Planning Authorities in the region.

A study undertaken on behalf of the Government estimated (subject to a significant margin of error, estimated to be plus or minus 15%) that in 2008 there were 43.5 million tonnes of aggregates produced from recycled materials in England. By applying the growth rate from the East Midlands Regional Waste Strategy, it is estimated that from

2020 to 2038, Derby and Derbyshire will produce around 3 million tonnes of recycled aggregate on an annual basis.

The overall assumption regarding the provision of alternative aggregates meant that the previous regional apportionment figures for primary land won aggregates were set at a lower level than they otherwise would have been. The use of alternative aggregates manifests itself in the recent sales figures for primary aggregate, which will be used to determine future provision of primary aggregate. It is expected that use of alternative aggregates will continue around this current rate for the foreseeable future.

Further, more detailed work will be undertaken on this issue to determine more precisely the production and use of recycled and secondary aggregates in Derby and Derbyshire. Future LAAs will update the position with this work and the potential implications, if any, for future supply patterns.

## 4. CALCULATING THE FUTURE PROVISION OF AGGREGATES

### **The Future Provision of Sand and Gravel**

To determine the future provision of sand and gravel, the NPPF states that the previous 10 years' sales need to be taken into account, as well as any other relevant information and an assessment of all supply options.

#### **Recent Sales**

As set out in the previous section, the average of the previous 10 years' sales of sand and gravel in Derby and Derbyshire is 0.96 million tonnes per year.

When looking ahead at possible future demand, the National Planning Practice Guidance states that LAAs must take into account other relevant local information in addition to the 10-year rolling supply. This section therefore considers the factors that may influence the demand for aggregate. It then sets out the approach the council will take to calculating the level of provision that needs to be made to meet the anticipated demand.

#### **Imports and Exports**

A national four-yearly monitoring survey is conducted by the DCLG and the British Geological Survey (BGS) which includes analysis of the movements (imports and exports) of aggregates for each MPA in England and Wales.

Operators of sand and gravel quarries in Derbyshire, provided comprehensive details of exports for the 2023 survey (shown in Table 9 below). The survey shows that the main export markets for sand and gravel are relatively local to the area.

In 2023, 62% of sand and gravel (513,015 tonnes) produced in the county was sold in Derbyshire, Derby and the Peak District National Park. 29.3% (242,223 tonnes) was exported to other MPAs within the East Midlands. Of the remainder which was sold to areas outside the East Midlands, the majority 44,911 tonnes (5.2%) was to the West Midlands region. In terms of imports, 368,000 tonnes was imported into the area from other areas in 2023 (the latest data available for imports). Exports (to areas outside Derby, Derbyshire and the PDNP) were around 309,959 tonnes in 2023.

**Table 9: Exports of Derbyshire's Sand and Gravel 2023<sup>9</sup> (Tonnes)**

<b>DESTINATION</b>	<b>(% of total production in brackets)</b>
Derbyshire, Derby and & The Peak District	513,015 (62.2%)
Nottinghamshire	71,434 (8.7%)
Lincolnshire	0
Leicestershire & Rutland	169,601 (20.5%)
Northamptonshire	1188 (0.1%)
<b>Other Regions</b>	
North West	206 (0.02%)
Yorkshire & Humber	19,670 (2.4%)
Staffordshire	2649 (0.3%)
West Midlands (not including Staffs)	44,911 (5.2%)
East of England	0
London	0
South East	300 (0.02%)
South West	0
North East	0
Wales	0
Scotland	0

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<sup>9</sup> Aggregates Survey 2023

## **Marine won Sand and Gravel**

Being land-locked, Derbyshire, and indeed the whole of the East Midlands, does not produce any marine sand and gravel. The National and Regional Guidelines have in the past assumed a zero figure for production of this resource in this region. Transport costs also limit the import of this marine resource to this central area of the country. It is assumed, therefore, that marine sand and gravel is not a significant issue for Derbyshire and will not, therefore, form a part of this assessment.

## **Future Supply from Other Areas**

There are significant sand and gravel operations in other parts of the Trent Valley in areas which adjoin Derbyshire, including Staffordshire, Nottinghamshire and Leicestershire. Operations in these areas supply similar markets to the ones which operate in the Derbyshire part of the Trent Valley. It will be important, therefore, to determine likely future trends in production in these areas so that we can assess the potential impact on production in Derbyshire.

The Nottinghamshire LAA sets out that additional reserves will be released over the plan period to 2036 to replace existing quarries as they are worked out. The newly adopted Minerals Local Plan allocates new sites and based on current provision rates the Nottinghamshire Minerals Plan provides adequate provision for the foreseeable future.

The Leicestershire LAA indicates that there are permitted sand and gravel reserves to last 2 years, based on average sales over the most recent ten-year rolling period and there was a shortfall of 7.67mt on the sand and gravel requirement figure to 2031. All allocations in the Leicestershire Minerals and Waste Local Plan have now been taken up. Where allocations have only partially been taken up, this is likely to have been a commercial decision on the part of the current operator. In the case of one site, Shawell Quarry, the operator has indicated that no further extraction will take place at the site. This leaves a shortfall for the county, which is addressed to some extent through the provision of a policy which allows for sites to come forward outside the allocated areas. There are currently undetermined applications for two sites at Lockington and Quorn which would yield around 4.3 mt. There is also an undetermined proposal for a new quarry at Misterton which would yield around 8mt over 20 year period at rate of 400,000tpa. Supply can only continue to be sustained in Leicestershire if operators come forward with extensions to existing sites or look to bring forward new sites. This

situation may increase the demand for sand and gravel resources from Derbyshire over the Plan period, although the proposed extension to Lockington may relieve this in the short term. This situation will continue to be monitored by DCC and will be addressed as necessary in forthcoming LAAs.

With regards to Staffordshire, the Minerals Local Plan aims to maintain at least a 7-year landbank of permitted reserves of sand and gravel based on a production capacity of 5.0 million tonnes of sand and gravel per annum. The Staffordshire LAA indicates that three sites within the Trent/Tame Valley within Staffordshire continue to produce sand and gravel and there is another operational site within the Dove Valley. Towards the end of the plan period, the construction of HS2 through the area is likely to increase output by around 1mt per annum. Five borrow pits are proposed to meet this additional demand.

It appears, therefore, that future production from quarries in adjoining MPAs, which serve similar markets to the Derbyshire sand and gravel quarries, is most likely to be sustained at similar levels for the foreseeable future. The overall balance of production from these areas supplying similar markets is, therefore, likely to remain similar. This situation will be kept under review and any significant changes which arise will be addressed.

Sales of sand and gravel from Lincolnshire to Derbyshire and the Peak District have increased significantly in recent years whilst sales in the opposite direction have reduced significantly over a similar period. If Lincolnshire begins to use a greater amount of its sand and gravel as its local economy recovers, there may be less available to supply markets elsewhere, including Derbyshire and the Peak District. Commercial decisions will ultimately dictate the specific markets for the product but flexibility in provision would currently allow for the sales from Lincolnshire to be replaced if those supplies became curtailed.

The issue of a steady and adequate supply for the region as a whole will be addressed in the emerging Minerals Local Plan and be monitored through future LAA's.

## **Future Economic Growth**

The Government supports an agenda which promotes sustainable growth to stimulate economic recovery. There are a number of planned growth areas and potential major infrastructure projects in the area, which would help to achieve this aim. These projects would require significant amounts of sand and gravel, and it would be desirable for this to be sourced from the local area to limit the distance that it is transported.

### *House Building*

There is a strong national and regional agenda to increase house building. Future house building over the Plan period is likely to be a significant element in the use of the County's aggregates, as it has been in the past.

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. The Minerals Products Association estimates that a typical house uses up to 200 tonnes of aggregates in its construction<sup>10</sup>. This includes crushed rock as well as sand and gravel. It is worth noting also that the Minerals Products Association estimate that new house building only accounts for around 25% of overall aggregate consumption.

Within the Plan period, the D2N2 Growth Area will result in significant new housing development to the south of Derby and also in the area around Nottingham; an area which is already a significant market for sand and gravel produced in Derbyshire. Planned house building for the Derby Housing Market Area (Amber Valley, Derby City and South Derbyshire) as set out in draft Local Plans, for the period 2011-2028 is currently 33,388 homes<sup>11</sup>. This averages 1,854 dwellings per year.

For Nottinghamshire, based on the most recent 10-year housing trajectory data available from the districts, house building rates in Nottingham and Nottinghamshire are forecast to peak in peak in 2022/2023 at 7,352 dwellings and fluctuate between

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<sup>10</sup> [Profile of the UK Mineral Products Industry 2021](#)

<sup>11</sup> Housing Delivery in the D2N2 Area, 2016

6,000-7,000 dwellings per annum until 2028<sup>12</sup>. For the Greater Nottingham Housing Market Area, which is where most of Derbyshire's sand and gravel which travels to Nottinghamshire is used, the proposed housing provision figure to 2028, as set out in the District local plans, is 52,050<sup>13</sup>.

Growth is also proposed in other areas which are close to Derbyshire's sand and gravel resources and may therefore add to the demand. Significant housing is proposed in East Staffordshire Borough, the Local Plan proposing almost 6,500 new houses in the Burton area and around 1500 in the Uttoxeter area<sup>14</sup>.

There is some potential for increased demand for sand and gravel from Derbyshire as a result of future housing developments within North West Leicestershire District and the northern part of Charnwood Borough (Loughborough and Shepshed). Housing completions within North West Leicestershire between 2011 and September 2016 totalled 2690, an average of 448 per annum. The Plan makes provision for a minimum of 9620 dwellings over the period 2011-2031<sup>15</sup>, an average rate of 481 dwellings per annum.

Housing completions within Charnwood Borough between 2011 and 2018 averaged 666 dwellings per annum<sup>16</sup>. The Borough's Local Plan proposes 13,940 new houses over the period 2011-2028, some 37% of which is proposed in Loughborough/Shepshed), an average rate of 820 per annum<sup>17</sup>. This represents an increase of 36% on recent completions.

Taking account of this information, it seems reasonable to assume that the demand for Derbyshire's sand and gravel as a result of new house building in the area will at least be maintained at current levels, and there are indications that there may be an increased demand for the mineral from the house building industry in future years, particularly given the significant new housing planned in the area around Derby and Nottingham.

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<sup>12</sup> Nottinghamshire Local Aggregate Assessment, 2022

<sup>13</sup> Housing Delivery in the D2N2 Area, 2016

<sup>14</sup> East Staffordshire Borough Local Plan, Adopted 2015

<sup>15</sup> North West Leicestershire Publication Local Plan, Adopted 2017

<sup>16</sup> Charnwood Borough Council Housing Supply Report, 2018

<sup>17</sup> Charnwood Borough Council Local Plan, Adopted November 2015

### *Infrastructure Projects*

Within the Plan period, major infrastructure projects are planned to take place in the area and in the surrounding areas which currently use sand and gravel quarried from Derbyshire within the Plan period. A new gas fired power station is proposed at Willington. A new regional freight depot is also being built in the southern part of the area, adjacent to East Midlands Airport, off J23A of the M1 Motorway. This is close to the area of Derbyshire where sand and gravel is produced. STEP (Spherical Tokamak for Energy Production), set to be the world's first fusion power plant proposed at West Burton will require a large amount of aggregate. Depending on contractual arrangements/market drivers, these projects may demand sand and gravel from quarries in Derbyshire.

### **Conclusions**

An attempt to quantify the demand from future development for sand and gravel from the area would be open to significant interpretation. A very crude estimate could be made by multiplying the planned number of forecast new households in the Plan area over the Plan period by the amount of aggregate which houses are estimated to use in their construction (200 tonnes). However, Derbyshire covers a large geographic area and a significant number of the forecast approx. 50,000 new households will not form in the area which uses the majority of sand and gravel from Derbyshire for house construction. It is also likely that many of the new houses to be built in the south of the county will use sand and gravel from neighbouring areas. It is also important to note that the figure of 200 tonnes will include crushed rock as well as sand and gravel. Therefore, if the forecast of approx. 50,000 new households forming in Derbyshire by 2032 was used as a basis for estimating future demand for aggregate, around 1.5mt of aggregate would be required for new houses annually and this is estimated to represent 25% of total aggregate requirements, which means, using this estimate, around 6mt of aggregate would be required annually from this area. With production of crushed rock and sand and gravel together averaging around 12 million tonnes in the area covered by this LAA, it is clear that sufficient aggregate is being made available from this area. To be able to put a more precise number on future demand for sand and gravel from house construction which would not be open to interpretation would require detailed formulaic modelling which this authority is not currently in a position to carry out.

Provided that the data continues to be monitored on an annual basis, any significant changes will be detected, and the necessary action will be taken to ensure that there continues to be an adequate and steady supply of aggregate minerals provided over the Plan period. The Minerals Local Plan also proposes an additional sites policy to allow sites to come forward that are not allocated in the Plan should monitoring show that the provision figure needs to be higher.

The previous Local Aggregate Assessment (based on 2023 data) used the provision figure based on the most recent 3 years, as this presented the higher figure of 1 million tonnes. For this Local Aggregate Assessment (based on 2024 data) the 10 year average and the 3 year average are very similar i.e. 0.96 mt and 0.95 mt respectively. This assessment therefore continues with the slightly higher 10 year average of 0.96 million tonnes. It is likely that the figure will increase to some extent over the next few years as a result of the planned economic growth in the area where the demand for the sand and gravel is greatest. It should be noted that this proposed figure is not a ceiling figure; there may be years when production is higher than this. It is intended, therefore, as an average figure to guide production over the Plan period.

This figure will continue to be reviewed on an annual basis to ensure that it takes account of any significant changes in sales and demand, as well as any other new and emerging information, particularly relating to future economic growth. It should also be noted that for the next Local Aggregate Assessment, it may be more suitable to use the 10 year average, depending on the emerging figures.

Based on this proposed annual provision rate of 0.96 million tonnes, the proposed total apportionment for the 15-year period 2024-2038 that Derbyshire will provide is 14.4 million tonnes of sand and gravel (0.96 x 15). As set out above, there are already permitted reserves of 5.8 million tonnes. Additional provision will have to be made, therefore, for around 8.6 million tonnes of sand and gravel for the Plan period to 2038.

This provision is made in the emerging Minerals Local Plan through allocated sites. Sites have been put forward by mineral operators which have been assessed through the Local Plan process, and the sites which are proposed to be allocated in the Plan will address the future requirement for sand and gravel to 2038. Annual monitoring will continue to ensure that a seven-year landbank is maintained.

## **The Future Provision of Aggregate Crushed Rock**

To determine the future provision of aggregate crushed rock in Derbyshire and the PDNP, the previous 10 years' sales need to be taken into account, as well as any other relevant information and an assessment of all supply options.

### **Recent Sales**

In determining the level of future provision of crushed rock, the Assessment should first consider past sales for the previous 10 years. This includes limestone and gritstone/sandstone.

As explained above, the average annual sales figure for the area for the 10-year period 2015 to 2024 is 12.68mt. This figure comprises 9.49mt for Derbyshire and 3.19mt for the PDNP. The most recent 3-year average is 15.12 million tonnes (12.28mt for Derbyshire and 2.83mt for the PDNP).

### **Imports and Exports**

The most recent 2023 survey collected information regarding destination of aggregate crushed rock, as shown in the table below.

34% of the aggregate grade crushed rock that was quarried from Derbyshire was used within this same area<sup>18</sup> and around 41% of the total production was consumed in the East Midlands (including Derbyshire and the PDNP). A significant proportion of Derbyshire's production goes to the North West Region (17.6%) and 16.6% to the West Midlands Region. Yorkshire/Humber and South East of England together also take a significant amount (12% and 6.8% respectively) and the East of England 6.2%. Other regions together take relatively small amounts.

Approximately a quarter of the production from the PDNP (23.8%) is used within the local area, 19% in the West Midlands region and 17% within the North West region. The, East of England and the South East are also significant markets relative to the overall production rate. We have contacted the authorities which use significant amounts of crushed rock for aggregate from this area. The indication from these authorities is that it would be likely that their demand would remain similar to current levels over the period to 2038.

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<sup>18</sup> Mainly within the area of Derbyshire outside the PDNP, as a result of the general restriction on development in the Peak District National Park

**Table 10: Exports of Crushed Rock from Derbyshire and Peak District Quarries (Tonnes)<sup>19</sup>**

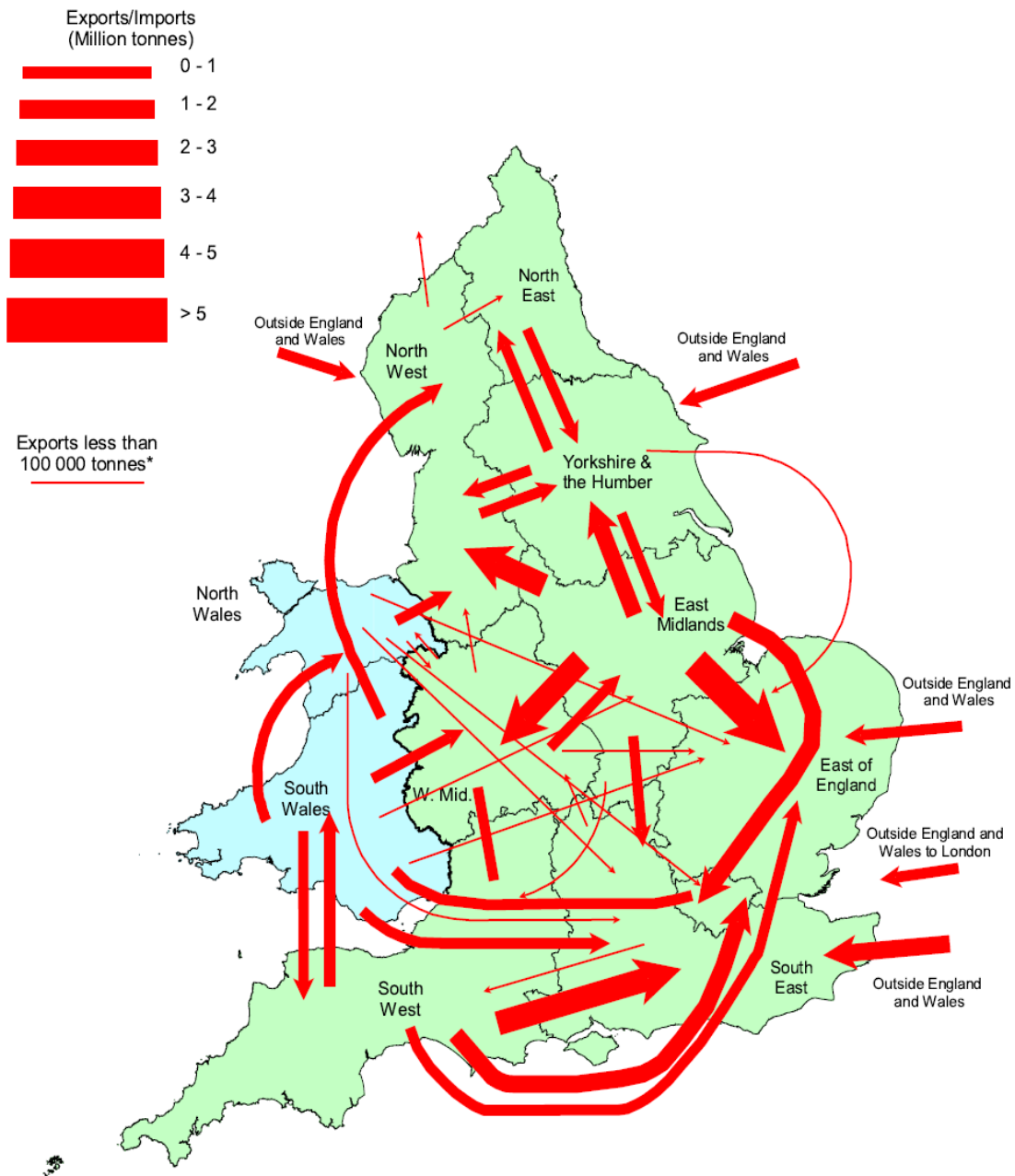
<b>DESTINATION</b>	<b>Produced in Derbyshire 2023</b>	<b>Produced in the Peak District 2023</b>
Derbyshire Derby & Peak District	3,986,218 (34.2%)	685,310 (23.8%)
Nottinghamshire	407,862 (3.5%)	13,174 (0.4%)
Lincolnshire	107,409 (0.9%)	0
Leicestershire & Rutland	94,698 (0.8%)	10,237(0.3%)
Northamptonshire	206,442 (1.8%)	194,932 (6.8%)
<b>Other Regions</b>	<b>Produced in Derbyshire 2023</b>	<b>Produced in the Peak District 2023</b>
North West	2,061,925 (17.6%)	489,520 (17%)
Yorkshire & Humber	1,395,564 (12%)	67,122 (2.3%)
West Midlands	1,938,389 (16.6%)	548,402 (19%)
East of England	720,567 (6.2%)	411,778 (14.3%)
South East	799,380 (6.8%)	454,916 (15.8%)
South West	1461 (0.01%)	0
North East	1172 (0.01%)	710 (0.02%)
Wales	23,143 (0.2%)	59 (0.003%)
Scotland	116 (0.001%)	0
Unknown	547,337(4.7%)	663 (0.02%)
<b>Totals</b>	<b>9,189,407</b>	<b>2,918,844</b>

It is clear from the size of Derbyshire’s and the PDNP’s landbank of aggregate grade crushed rock that it will be able to continue to supply these markets as required at least over the timescales covered by the authorities Development Plans although it will be necessary to address the end dates of the permissions to ensure a landbank can be maintained at the end of the plan period. The area is, and is likely to continue to be, an important supplier of aggregate grade crushed rock on a wide geographical scale.

<sup>19</sup> Aggregates Survey 2023

Although it can be seen that Derbyshire and the PDNP export a significant amount of aggregate grade crushed rock, some is also imported into the area. This is likely to be a result of market forces and commercial decisions, as well as the need to import any particular types of aggregate which cannot be supplied from within the sub-region as a result of geological or resource constraints. In 2023, 582,000 tonnes of aggregate grade crushed rock was imported to Derbyshire and the Peak District, the majority of which originated from Leicestershire/Rutland. Data shows that the majority of the remainder is imported from the North West, Yorkshire and Humber and the West Midlands regions.

**Figure 6: Crushed rock inter-regional flows**



It is apparent, therefore, that Derbyshire and the PDNP is a significant net exporter of aggregate grade crushed rock to other areas, currently amounting to around 9-10 million tonnes each year. Derbyshire has significant resources of hard rock compared with many other areas in the country and it will be important, therefore, to maintain this level of supply in order to sustain and stimulate national economic growth.

## **Future Supply from Adjacent Areas**

Leicestershire is the only adjoining authority which produces aggregate crushed rock to a significant extent. The Leicestershire LAA indicates that there will be sufficient reserves in the foreseeable future to sustain production at recent levels. It is likely, therefore, that the overall balance of production from areas supplying similar markets to Derbyshire and the PDNPA is likely to remain similar over the timescales covered by the authorities' Development Plans.

## **Future Economic Growth**

Limestone from Derbyshire and the Peak District is a resource of national importance, which does not exist to such an extent in most other areas of the country. As can be seen from Table 9 above, the markets for this product are, therefore, much wider than they are for sand and gravel.

Proposed sustainable economic growth in many areas which already draw on the resource is likely, therefore, to at least maintain the demand and may lead to an increase in demand for the mineral over the Plan period. There are a number of proposals which should be taken into account in this respect and could lead to an increase in demand for crushed rock (limestone) from this area.

The Government supports an agenda which promotes sustainable growth to stimulate economic recovery. There are a number of planned growth areas and potential major infrastructure projects in the area, which would help to achieve this aim. These projects would require significant amounts of crushed rock from Derbyshire.

There is a strong national and regional agenda to increase house building. Future house building over the Plan period is likely to be a significant element in the use of the aggregate from this area.

It is likely that proposed housing and economic development in the Three Cities Growth Area (an area proposed for economic growth centred on Nottingham, Leicester and Derby), particularly in the area to the south of Derby and around Nottingham<sup>20</sup>, will result in an increased demand for Derbyshire's mineral resources, as well as planned development in the Sheffield City Region and the Manchester City Region Growth Areas, which are important existing markets for aggregate crushed rock from Derbyshire. There may also be an increased demand as a result of development in

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<sup>20</sup> See page 30 for details of proposed housing numbers

the Milton Keynes and South Midlands Growth Zone. The proposed high-speed rail link (HS2) between London and Birmingham, the Regional Freight Depot near East Midlands Airport and the STEP (Spherical Tokamak for Energy Production), set to be the world's first fusion power plant proposed at West Burton will all require a large amount of aggregate, which are also likely to increase the demand for crushed rock aggregate from this area within the Plan period.

It is not possible to assess precisely the demand for aggregates associated with these projects at this stage, but future assessments will monitor progress with these major development proposals and respond as necessary to any significant changes that arise.

### **Provision of Additional Reserves in the Peak District National Park only in Exceptional Circumstances**

The PDNP has a policy in its Core Strategy (Policy MIN1) which only allows for further new quarries or extensions to existing quarries in exceptional circumstances in accordance with the tests set out in national policy. The primary aim of this approach is to protect the nationally important landscape, as set out in NPPF.

In this respect, the NPPF seeks, as far as is practical, to provide for the maintenance of landbanks for non-energy minerals outside areas such as National Parks. This should be considered in the context of the benefits of mineral extraction to the national and local economy and ensuring that adequate supplies of minerals are provided, recognising that minerals can only be worked where they occur and the nationally important role the quarries in the area play in minerals supply. Future contributions of aggregate from the Peak District National Park and the implications for mineral extraction in areas outside the National Park will need to be considered in light of these issues.

### **Conclusions**

The East Midlands Aggregates Working Party (EMAWP) has agreed an approach whereby the future provision rate should be based primarily on the most recent ten-year average sales figure. As well as taking account of this ten-year average figure, other important local and wider matters must be taken into consideration in formulating the final provision rate, as set out above, including the most recent three-year average sales figure.

The ten-year average figure includes a period of depressed sales of aggregate crushed rock to 2015, as a result of an economic downturn when reduced demand saw sales being significantly lower than they had been in previous years. Increased demand since 2016 has seen an increase in the three-year average sales figure which, at 15.12mt, is now significantly above the ten-year average figure of 12.689mt. As a result, it would seem inappropriate to base future demand for aggregate crushed rock on the ten-year sales figure. The LAA considers that the three-year sales average is now most representative of current demand and is likely to be more representative of anticipated demand in future years.

Future housing growth and other economic and infrastructure projects that could result in a demand for aggregates from Derbyshire and the Peak District National Park are not considered likely to result in a level of demand that is not reflected in the three-year sales average. However, given the nationally important role that the area plays in minerals supply, production of aggregate crushed rock from the area will continue to be monitored on an annual basis and, along with other factors such as economic growth and demand from other regions and the NPPF requirement to as far as is practical, provide for the maintenance of landbanks outside National Parks, will inform the review of provision rate figures in future LAA's.

As a result, from 2025 to 2039, Derbyshire and the PDNP will make provision for 226.8 million tonnes of aggregate grade crushed rock (15.12mt x 15 years). Assuming 15.12mt per annum is worked over 15 years, and that no further reserves are permitted in this time, there will still be a landbank of aggregate grade crushed rock of 467.84 million tonnes by 2038, sufficient to last around 31 years at current average production rates. There is sufficient supply, therefore, to meet future demand for aggregate grade crushed rock, which this area currently supplies. Although it is noted that all the current permissions expire by 2042 or before so extensions of time at existing sites or new permissions will be needed before then in order to maintain a steady and adequate supply of crushed rock.

In respect to sand and gravel there is an urgent need for new reserves as the minimum 7 year landbank is not currently being maintained and it is clear from the information in Table 2 that the current sites will not sustain production over the full course of the Plan period to 2038. Further sites continue to be identified through work on the

emerging Minerals Local Plan and will need to be brought forward to sustain production over this time to ensure that the agreed annual requirement continues to be met.

**Produced by Derbyshire County Council, Derby City Council and the Peak District National Park Authority. If you have any queries regarding this document, please contact The Minerals Planning Team, Derbyshire County Council, County Hall, Matlock, DE4 3AG, or email [planning.wastemin@derbyshire.gov.uk](mailto:planning.wastemin@derbyshire.gov.uk)**