

Draft Nottinghamshire and Nottingham Local Aggregate Assessment

CONTAINING 2025 SALES DATA

DRAFT PUBLISHED OCTOBER 2026



Langford quarry, taken by the County Council



**Nottinghamshire
County Council**



**Nottingham
City Council**

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Summary

The Nottinghamshire and Nottingham Local Aggregates Assessment (LAA) is a document produced under the requirements set out chapter 11, Facilitating the sustainable use of minerals, in the National Planning Policy Framework (NPPF) and covers the geographical area of Nottinghamshire, including the Nottingham City unitary authority area. It monitors annual sales data for aggregate minerals as well as identifying other relevant local information to enable the Mineral Planning Authorities to plan for a steady and adequate supply of minerals.

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

The LAA sets out:

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

This LAA details the annual sales data for 2025.

Key Findings

Nottinghamshire is an important producer of sand and gravel and Sherwood Sandstone and is an exporter for these aggregates, particularly to South Yorkshire and the wider East Midlands. Crushed rock production is currently at zero with the aggregate imported predominantly from Derbyshire and Leicestershire.

Sales of aggregate minerals have continued to fluctuate over the past ten years but have remained lower than pre-recession years. The COVID – 19 pandemic saw sales drop sharply in 2020 due to the impact of lockdowns and whilst sales recovered the following years, flooding in the Trent Valley in 2023 and 2024 resulted in sand and gravel sales falling again. 2025 sales indicate a slight increase in sales but remain lower than 2022 sales. This has impacted both the 10 – year and 3 – year sales averages, which have decreased over the years.

Sherwood Sandstone sales, however, increased following 2020, reaching a peak of 0.64 million tonnes in 2024 before falling again in 2025 to 0.25 million tonnes. The peak in Sherwood Sandstone sales in 2024 has meant the 3 – year average sales has increased whilst the 10 – year average remains relatively stable.

The landbank for sand and gravel and Sherwood Sandstone has decreased in 2025 compared to 2024 as reserves have been worked and no new permissions were granted in this period to add to the landbank. Both, however, remain above the minimum 7 – year landbank requirement set out in the NPPF, though this is based upon the 10 – year sales average. Table 1 summarises the key figures for both aggregates.

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

With the introduction of new plan – making regulations, the adopted Minerals Local Plan now needs to be replaced as it is over 5 years old. The County and City Councils have agreed to prepare a joint Minerals Local Plan which will cover both authorities. Work has commenced on preparing this new Plan, with views being sought on what provision rate should be used to calculate future demand for aggregates, which considers previous sales and known planned growth. The potential options are presented in this draft LAA, with a finalised LAA to be published once the Councils have considered representations and any further evidence and chosen an appropriate provision rate.

New Nottinghamshire Minerals Local Plan
Draft Local Aggregates Assessment – October 2026

Table 1: Sales and landbank figures as of December 2024

Aggregate	Sales in 2025 (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 2025 (million tonnes)	Change in permitted reserves from previous year	Landbank (years)	Change in Landbank from previous years
Land won Sand and Gravel	1.02	↑ by 0.13mt	1.20	0.94	↓ By 0.05mt		17.51	↓ By 1.68mt	14.59	↓ By 0.88 years
Sherwood Sandstone	0.25	↓ By 0.39mt	0.32	0.37	↓ By 0.01mt		6.06	↓ By 0.27mt	18.94	↓ By 0.24 years
Crushed Rock	0.00	→ At 0	0.00	0.00	→ At 0	0.00	3.34	→ At 3.34	N/A	N/A
Total Primary Aggregates	1.27	↓ By 0.26mt	1.51	1.30	↓ By 0.06mt					

1. Introduction

- 1.1. The requirement to prepare a Local Aggregate Assessment (LAA) was introduced in the National Planning Policy Framework (NPPF) in March 2012 and is a continued requirement within the latest 2026 NPPF under clause 2(a) of Policy M1: Planning for a sufficient supply of minerals. The NPPF states that the LAA should forecast future demand based on:
 - The latest 10 – year average sales data
 - Assessment of all supply options, including marine dredged, secondary and recycled sources.
 - Other relevant local information
- 1.2. The Planning Practice Guidance also sets out an additional requirement to identify the 3 – year average sales figure, in particular to identify the general trend of demand as part of the consideration of whether it might be appropriate to increase supply.
- 1.3. The data contained in the LAA alongside consideration of advice from the Aggregate Working Party, national and sub-national guidelines on future provision, will ensure Minerals Planning Authorities (MPAs) plan for a steady and adequate supply of aggregate minerals in their area over the life of the Minerals Local Plan.
- 1.4. This LAA therefore sets out the aggregates found in Nottinghamshire and Nottingham City and details the current situation of local production in terms of sites, sales, permitted reserves and landbanks for primary aggregates. Alternative sources of aggregates are then considered, followed by local, national and regional considerations which may impact future demand.
- 1.5. The LAA is required to be updated on an annual basis so that the Councils can monitor ongoing patterns and trends in aggregate sales and ensure that adequate reserves are maintained.
- 1.6. The information used in this LAA is based upon information retrieved from the 2025 Aggregate Monitoring (AM) survey returns relating to the period 1st of January to 31st of December 2025.
- 1.7. This information has been collated together to understand how aggregate provision should be calculated moving forward, particularly for the new Joint Nottinghamshire Minerals Local Plan. Establishing the aggregate provision rate is crucial in calculating future demand and therefore the need for further

reserves to ensure demand can be met and a steady and adequate supply maintained.

- 1.8. Please note on this occasion, a draft LAA has been published so that feedback on the provision rates and future demand can be received as part of the scoping consultation for the preparation of the new Nottinghamshire Minerals Local Plan. A final LAA will be published once feedback and any further evidence have been considered on the most appropriate provision rate to use for each aggregate.
- 1.9. The LAA is informed by consultation with the East Midlands Aggregate Working Party. The Aggregates Working Party is made up of MPAs from across the region and industry representatives. Its role is to provide technical advice about the supply and demand for aggregates, and it usually undertakes annual monitoring of aggregate production and levels of permitted reserves across the East Midlands. This information is then supplied to MPAs and to the National Aggregate Co-ordinating Group to inform national aggregate provision.

2. Aggregates in Nottinghamshire and Nottingham City

- 2.1. Aggregates account for around 90% of minerals used in construction and are essential in maintaining the physical framework of buildings and infrastructure on which our society depends. Aggregates are usually defined as hard granular materials and include sand and gravel, Sherwood Sandstone and limestone in Nottinghamshire, with Plan 1 illustrating where these primary aggregates are found in the area. Primary aggregates' main uses include concrete, mortar, roadstone, asphalt, railway ballast, drainage courses and bulk fill. Alternative aggregates are also used within Nottinghamshire, which include secondary and recycled materials.

Primary Aggregates

Sand and gravel

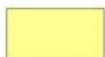
- 2.2. Important alluvial (river) sand and gravel deposits are found in the Trent and the Idle Valleys which have made Nottinghamshire an important producer of sand and gravel in the East Midlands. Limited extraction also occurs in glaciofluvial sand and gravel deposits near East Leake, south of Nottingham.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

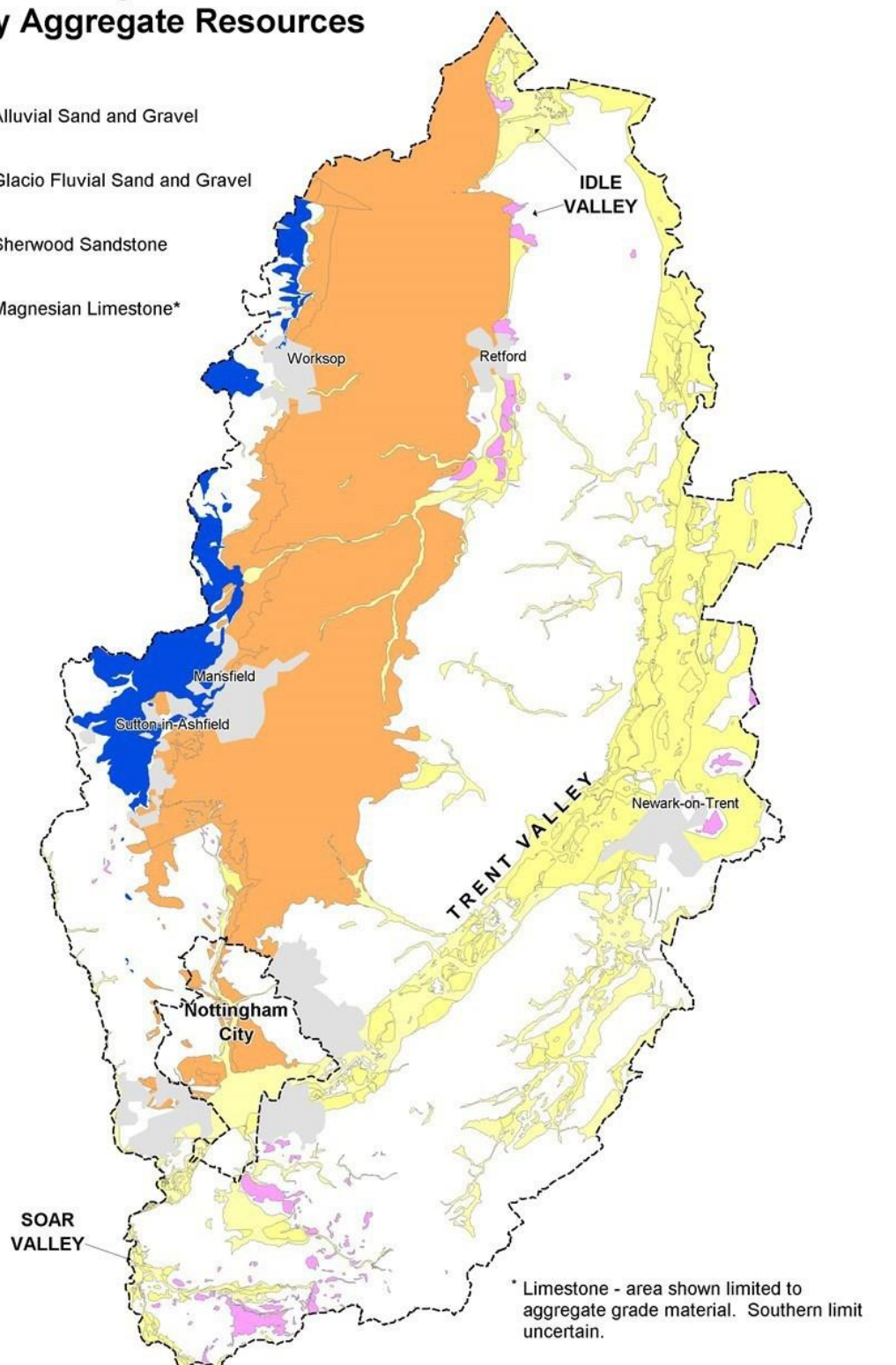
Sherwood Sandstone

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

Plan 1 - Nottinghamshire - Primary Aggregate Resources

Key

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



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

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

Magnesian Limestone

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

Alternative Aggregates

- 2.5. Alternative aggregates comprise secondary and recycled materials, although these terms are often used interchangeably. Recycled aggregates are materials that have been used previously and include some types of construction and demolition waste, asphalt road planings and used railway ballast. Secondary aggregates are by-products of other processes that have not been previously used as aggregates. They include colliery spoil, power station ashes, blast furnace and steel slag, incinerator ashes and foundry sands.
- 2.6. Since 1980 there has been a significant increase in annual alternative aggregate production in Great Britain (GB), rising from 20 million tonnes to a high of 71 million tonnes in 2007 (25% of total aggregates sales). Sales of recycled aggregates mirrored the fall of sales of primary aggregates nationally during the recession. However, sales of both primary and recycled aggregates have been increasing since the recession. In 2020 sales of recycled aggregates stood at 74 million tonnes (30% of total aggregates sales)¹. Britain is second in Europe for recycling aggregates, and it is estimated that alternative aggregates use in GB is around three times higher than the European average.
- 2.7. Alternative aggregates are currently most widely used in lower grade applications such as bulk fill. However, the range of uses is widening due to advances in technology and the increasing economic incentive to use them instead of primary aggregates.
- 2.8. In Nottinghamshire, sources of alternative aggregates include construction and demolition waste, power station ash, river dredgings, road planings and rail ballast.

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

3. Local Production

Introduction

- 3.1. Each year, on behalf of the East Midlands Aggregate Working Party, the Councils undertake an aggregates survey which collects data on local sales of aggregates and reserve levels at permitted sites. This information is then published in the LAA and is used to help inform future demand for aggregates. The sales and reserve data for the 2025 survey is provided below in this section by each aggregate type.
- 3.2. The data from Nottinghamshire is collated together with information from other MPAs in the East Midlands Aggregate Working Party (EMAWP). This information is then published in the EMAWP Annual Report². The regional trend for each aggregate has been considered to indicate any trends that should be taken into consideration.
- 3.3. Every four years, a more extensive aggregate minerals survey is undertaken nationally. This survey collects data on national and sub-national sales and movements of aggregates between authorities and regions, therefore giving insight into how much authorities are importing and exporting and to where. The last national aggregate minerals survey was undertaken in 2023 by the British Geological Society (BGS), with the report published in August 2025. The results of the national survey are presented under each aggregate section below.
- 3.4. Please note that the national survey and EMAWP Annual Report do not separate Sherwood Sandstone as it is a specialist type of sand and gravel. Sherwood Sandstone figures are therefore included within the sand and gravel figures within these reports.

Sand and Gravel

Sites

- 3.5. There are currently 8 permitted sand and gravel quarries in Nottinghamshire which are listed in [Table 2](#) below that contribute to the sales and reserve figures. There is also a windfall site at Wigsley where incidental mineral extraction is occurring to facilitate the development a fish farming pond.
- 3.6. Currently, two of the sites, Girton and Sturton Le Steeple, are inactive and it is noted that Besthorpe is at minimal activity, working only stockpiles. Whilst

² [East Midlands Aggregate Working Party \(EMAWP\) | North Northamptonshire Council](#)

Holcim has indicated that Sturton le Steeple will commence extraction and sales in 2026, there is currently no plan to re-commence extraction at Girton.

- 3.7. Table 2 also indicates the potential production capacity for each of these sites, with this based upon the latest information made available to the public. This shows that Nottinghamshire has the potential production capacity of 1.9 million tonnes a year if all sites were active and producing at the rates indicated. Excluding the inactive sites, this capacity would be 1.2 million tonnes. It should be noted that production capacity will fluctuate as operators react to market demand.

Table 2: Permitted sand and gravel quarries in Nottinghamshire

Site	Operator	Status	Planning Permission End Date	Potential Production Capacity (tonnes)	Source of Potential Production Capacity
Langford	TARMAC	Active	23/09/2028	400,000	3/25/01846/CMA
Besthorpe	TARMAC	Active	21/11/2037	200,000	3/19/01929/CMM
Girton	TARMAC	Inactive	31/12/2035	200,000	3/16/01341/CMM
Cromwell	CEMEX	Active	24/04/2029	300,000	3/24/02157/CMA
East Leake	CEMEX	Active	19/10/2029	180,000	8/21/00728/CMA
Sturton le Steeple	HOLCIM	Inactive	31/12/2035	500,000	Minerals Local Plan
Misson Bawtry Road	MISSION SAND AND GRAVEL	Active	04/03/2031	80,000	1/24/00410/CDM
Scrooby Quarry	RSG (Rotherham Sand & Gravel)	Active	31/12/2028	40,000	1/23/01346/CDM
TOTAL				1,900,000	

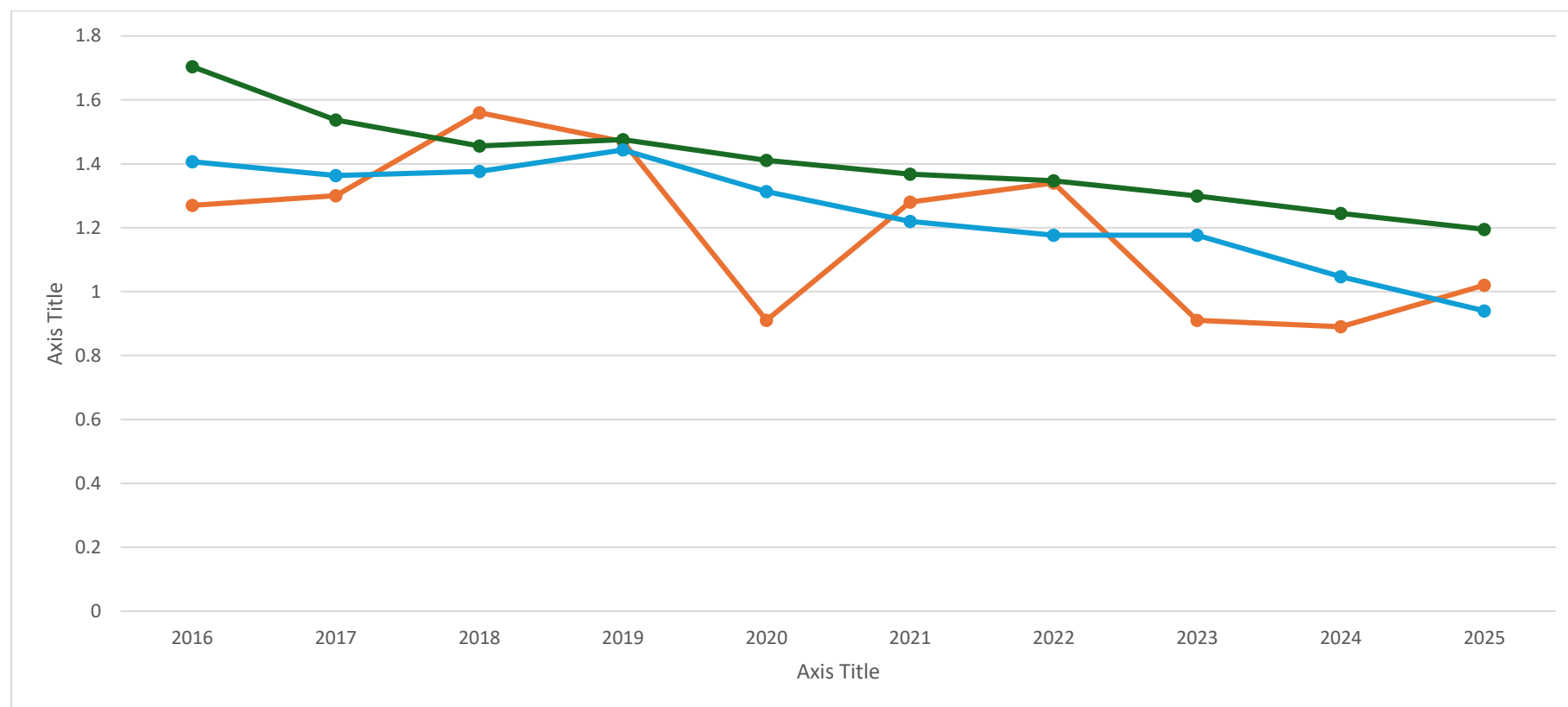
Sales

- 3.8. Figure 1 below shows the data for the past 10 years for sand and gravel sales in Nottinghamshire as well as the 10 – year and 3 – year average of sales.
- 3.9. Figure 1 shows how sales of sand and gravel have fluctuated over the past ten years, reaching a peak in 2018 before falling sharply in 2020 due to the impact of the COVID – 19 Pandemic. Whilst sales started to recover in 2021 and 2022, sales in 2023 and 2024 fell to a low of 0.89 million tonnes. This was caused by slow growth in construction activity and unprecedented flooding in the Trent Valley in the autumn of 2023 and the early months of 2024, particularly caused by Storm Babet and Henk. When sites are flooded, only stockpiles can be worked, it can take some time to pump out the flood water and undertake the appropriate checks before operations can recommence. These two major, unprecedented flood events therefore impacted on the working and winning of sand and gravel and so sales, particularly for sites in the Trent Valley.

- 3.10. Sales in 2025 increased by 15% compared to 2024, though remained lower than 2021 and 2022 sales. Whilst there were no unprecedented flood events in 2025, operators and the MPA have indicated that economic uncertainty continues to hinder project delivery and so demand for construction materials. This has been particularly reflected in cement production levels, which in 2025 fell to the lowest levels since 1950s. This is associated with high energy costs and imports of cement increasing as it becomes the cheaper option. Increased imports show there is still a demand though, with cement a key component alongside sand and gravel for concrete, which is used within all construction projects.

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Figure 1 : Sales of sand and gravel between 2016 – 2025 against the 10 – year and 3 – year average sales figure.



Legend	2016	2017	2018	2019	2020	2021	2022	2023	2024	2025
Actual sales	1.27	1.30	1.56	1.47	0.91	1.28	1.34	0.91	0.89	1.02
10yr average	1.70	1.54	1.46	1.48	1.41	1.37	1.35	1.30	1.25	1.20
3yr average	1.41	1.36	1.38	1.44	1.31	1.22	1.18	1.18	1.05	0.94

10 – year and 3 – year sales average

- 3.11. The lower sand and gravel sales in recent years are reflected in the 10 – year sales average, which has been slowly declining each year as previous years higher sales figures fallout. The 10 – year sales average in 2025 was 1.20 million tonnes compared to the 2016 average of 1.70 million tonnes. The impact of the flooding events of 2023 and 2024 and pandemic in 2020 is particularly noticeable, which if removed would result in an average of 1.32 million tonnes.
- 3.12. The impact of lower sales in 2023 and 2024 have also greatly impacted the 3 – year sales average, which for the first time went below 1 million tonnes in 2025.

Permitted reserves

- 3.13. The total permitted reserves across the 8 sites listed in **Table 2** currently total 17.51 million tonnes. In 2025, no new permissions were granted for new quarries or extensions to existing sites which would add to the permitted reserves.
- 3.14. Due to the confidentiality and the sensitive nature of this data, the reserve figure for each site is not published but **Table 3** details the geographical spread of reserves over Nottinghamshire. Since there is now only 1 operational quarry in the Nottingham area, East Leake, **Table 3** includes this site within the Trent Valley area.

Table 3: Geographic spread of the permitted reserves from 2021 – 2025

Year	Idle Valley		Trent Valley (Newark and Nottingham)	
	Total reserves (million tonnes)	Percentage of total reserves	Total reserves (million tonnes)	Percentage of total reserves
2021	8.75	41%	12.74	59%
2022	8.34	41%	12.17	59%
2023	8.67	42%	11.98	58%
2024	8.52	45%	10.57	55%
2025	8.01	46%	9.50	54%

- 3.15. As shown in **Table 3**, since 2021 as the sites in the Newark and Nottingham area have been worked, the total reserves and percentage of the total reserves in the Trent Valley have fallen. Whilst the reserves in the Idle Valley have fallen over time, this is at a much slower rate due to the inactive Sturton le Steeple quarry. Both factors have led to the percent of reserves in the Idle Valley increasing by 5% in 5 years whilst the percent in the Trent Valley as fallen. It is also noted that the overall permitted reserve figure has also fallen since 2021.

- 3.16. The 17.51 million tonne reserve figure includes permitted reserves at the two inactive sites of Girton and Sturton le Steeple, as per paragraph 083 of the Planning Practice Guidance. It is noted that approximately 62% of the permitted reserves are held between these two sites. Sturton le Steeple though is expected to become active in 2026 and begin contributing to sales.

Landbank

- 3.17. As set out in the Planning Practice Guidance, landbanks are expressed as the number of years' supply remaining and are calculated by dividing the permitted reserves by the provision rate. Policy M1 of the NPPF requires mineral planning authorities to maintain a landbank of at least 7 years for sand and gravel.
- 3.18. Table 4 shows the landbank calculations based upon the:
- 10 – year sales average
 - 3 – year sales average
 - Planned provision rate in the Nottinghamshire Minerals Local Plan (2021)
 - Alternative sales average where the lower sale years have been removed (2020, 2023 and 2024)

Table 4: Landbank of sand and gravel in December 2025 based upon different provision rates

Provision Rate	Figure of provision rate (million tonnes)	Landbank calculation (based upon 17.51 million tonnes of permitted reserves)
10 – year sales average in 2025	1.20	14.59 years
3 – year sales average in 2025	0.94	18.83 years
Local Plan forecasted annual rate	1.7	10.3 years
Sales average from 2016 – 2025 minus 2020, 2023 and 2024	1.32	13.27 years

- 3.19. For all provision rates, the landbank was above the minimum 7-year landbank requirement, though as made clear in paragraph 084 of the Planning Practice Guidance, 7 years is a minimum requirement. There is no maximum limit to the landbank and 7 years is not a target to aim for.

Sherwood Sandstone

Sites

- 3.20. Currently, there are 4 sites in Nottinghamshire that extract Sherwood Sandstone which are detailed in Table 5 below. 1 of the sites is currently inactive, with the operator indicating this is due to market demand and will be worked as and when needed.
- 3.21. It should be noted that Two Oaks Farm is included within this provision as whilst, in policy terms, it is a non-aggregate site which produces specialised industrial sand for a specialised market, a proportion of the permitted reserves does produce aggregate. Therefore, Two Oaks is included within Table 5 below and the specialist sand reserves are excluded from the permitted reserves.
- 3.22. Table 5 also details the potential production capacity for each of the 4 sites, with this based upon the latest public available information. Using this, the potential production capacity across the 4 sites is 740,000 tonnes per annum if all sites were active and outputting at the rates indicated. This would be 620,000 tonnes if the inactive Scrooby Top site was removed. It should be noted that production capacity will fluctuate as operators react to market demand.

Table 5: Permitted Sherwood Sandstone quarries in Nottinghamshire

Site	Operator	Status	Planning Permission End Date	Potential Production Capacity (tonnes)	Source of Potential Production Capacity
Burntstump	TARMAC	Active	07/01/2042	30,000	7/2022/0752NCC
Bestwood 2	TARMAC	Active	31/12/2028	140,000	7/2017/1504NCC
Two Oaks Farm	Mansfield Sand Company	Active	13/10/2064	450,000	4/V/2021/0397
Scrooby Top*	RSG (Rotherham Sand & Gravel)	Inactive	31/05/2035	120,000	Minerals Local Plan
TOTAL				740,000	

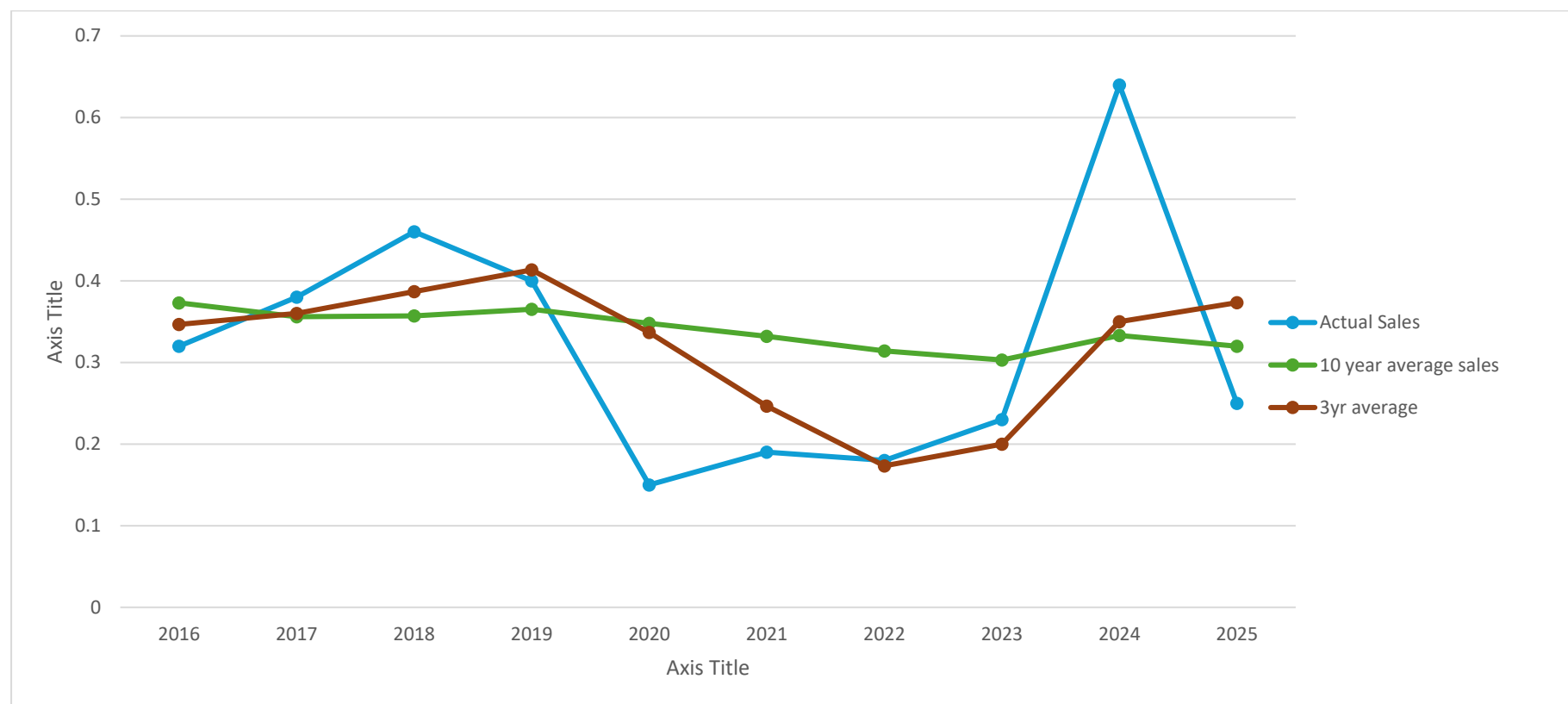
Sales

- 3.23. Figure 2 below shows the sales data for Sherwood Sandstone over the past 10 years as well as the 10 – year and 3 – year average.
- 3.24. As shown in Figure 2, Sherwood Sandstone sales have historically been lower than sand and gravel sales, reflecting its use in more specialised markets. After

remaining relatively stable, sales dropped significantly to 0.15 million tonnes in 2020 due to the COVID – 19 Pandemic. Sales showed a gradual recovery between 2021 and 2023 but in 2024 there was 64% increase in sales from 2023 to 0.64 million tonnes, a high that was last seen in 2003. This can be attributed to permissions granted at one of the sites which enabled an increase in their production which increased overall sales. 2025 though saw sales fall back to similar levels prior to this peak, thus not suggesting currently there is a continuing trend of sales at the 2024 levels.

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Figure 2: Sales of Sherwood Sandstone between 2016 – 2025 against the 10 – year and 3 – year average sales figure



Legend	2016	2017	2018	2019	2020	2021	2022	2023	2024	2025
Actual sales	0.32	0.38	0.46	0.40	0.15	0.19	0.18	0.23	0.64	0.25
10yr average	0.37	0.36	0.36	0.37	0.35	0.33	0.31	0.30	0.33	0.32
3yr average	0.35	0.36	0.39	0.41	0.34	0.25	0.17	0.20	0.35	0.37

10 – year and 3 – year sales average

- 3.25. Between 2016 and 2025 the 10 – year average has fluctuated between 0.37 and 0.30, though has overall declined over time to 0.32 million tonnes. This reflects the influence of the impact of the pandemic and the market’s recovery in 2021 and 2022.
- 3.26. The 3 – year average over the past 10 years remained close to the 10-year average until 2021, which reflects the impact of the pandemic. The 2024 and 2025 3 – year sales average show the influence of the higher sales recorded in 2024, with the average being 0.37 million tonnes in 2025.

Permitted reserves

- 3.27. Across the 4 sites listed in **Table 5**, the permitted reserves for Sherwood Sandstone totals 6.06 million tonnes. Please note that the specialist sand reserves at Two Oaks are excluded from this figure. In 2025, there was no new permissions granted for extensions to existing sites or new sites which would add to the permitted reserve.

Landbank

As a specialist form of sand and gravel, the requirement for a minimum 7-year landbank is required for Sherwood Sandstone.

- 3.28. **Table 6** below shows the landbank calculations based upon the:
- 10 – year sales average
 - 3 – year sales average
 - Planned provision rate in the Nottinghamshire Minerals Local Plan (2021)

Table 6: Landbank of Sherwood sandstone in December 2025 based upon different provision rates

Provision Rate	Figure of provision rate (million tonnes)	Landbank calculation (based upon 6.06 million tonnes of permitted reserves)
10 – year sales average in 2025	0.32	18.94 years
3 – year sales average in 2025	0.37	16.38 years
Local Plan forecasted annual rate	0.37	16.38 years

- 3.29. For all provision rates, the landbank was above the minimum 7 – year landbank requirement. Again, 7 years is a minimum requirement and there is no maximum limit to the landbank and so 7 years is not a target to aim for.



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

Sand and gravel including Sherwood Sandstone

- 3.30. As explained in the Introduction for this chapter, Sherwood Sandstone is a specialist type of sand and gravel found locally. Whilst the LAA and Plan separates Sherwood Sandstone to understand future demand and need of this locally important aggregate, sand and gravel and Sherwood Sandstone sales, reserves and so landbanks are collated together within the East Midlands Aggregate Working Party Annual Report as well as the National Aggregate Minerals Survey.
- 3.31. To provide clarity and before considering then the data from the National Aggregate Minerals Survey to identify exports and imports of sand and gravel, the combined data of both aggregates are provided below in **Table 7** for the past 10 years.

Table 7: Combined sales figures for sand and gravel and Sherwood sandstone

Year	Sand and gravel	Sherwood Sandstone	Combined
2016	1.27	0.32	1.59
2017	1.30	0.38	1.68
2018	1.56	0.46	2.02
2019	1.45	0.40	1.87
2020	0.91	0.15	1.06
2021	1.28	0.19	1.47
2022	1.34	0.18	1.52
2023	0.91	0.23	1.1
2024	0.89	0.64	1.53
2025	1.02	0.25	1.27

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

Exports

- 3.32. Table 8 below shows the distribution of sand and gravel from Nottinghamshire to other regions. It shows how half of the sand and gravel that originated in Nottinghamshire was consumed in Nottinghamshire whilst the remaining half was exported outside the County, with 33% going to other areas within the East Midlands.

Table 8: Sales of sand and gravel from Nottinghamshire to principal destination by sub region

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

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

- 3.33. Table 9 provides further detail of which mineral planning authorities consumed the sand and gravel sourced in Nottinghamshire for both the 2019 and 2023 survey. It shows that Leicestershire and Rutland continue to be the main authorities in the East Midlands where sand and gravel is exported to. Outside the East Midlands, Yorkshire and Humber was the largest consumer, with South Yorkshire the main authority to which resources were exported to in this region. Between 2019 and 2023 these exports have declined, reflecting the

depletion of resources and closure of sites in the Idle Valley, such as Finningley, that were located closest to South Yorkshire.

Table 9: Destination of sand and gravel extracted from Nottinghamshire by mineral planning authority

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

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

Imports

- 3.34. In terms of imports of sand and gravel into Nottinghamshire for consumption as aggregates, **Table 10** shows a similar picture in that aggregates predominantly were imported from East Midlands mineral planning authorities. In both 2019 and 2023, following Nottinghamshire, the second largest source of sand and gravel consumed in Nottinghamshire was sourced from Lincolnshire, with other sources including Derbyshire, Staffordshire and Peterborough.



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

Table 10: Sand and gravel consumed in Nottinghamshire supplied by mineral planning authorities

Source MPA	2019 Survey	2023 Survey
East of England Region		
Cambridgeshire	<1%	<1%
Central Bedfordshire		<1%
Peterborough	1 – 10%	1 – 10%
East Midlands Region		
Derbyshire and Peak District	1 – 10%	1 – 10%
Leicestershire	1 – 10%	<1%
Lincolnshire	20 – 30%	20 – 30%
Nottinghamshire	40 – 50%	60 – 70%
North East Region		
Durham	1 – 10%	
North West Region		
Cumbria	<1%	
West Midlands Region		
Staffordshire	1 -10%	1 – 10%
Yorkshire and Humber		
Doncaster	<1%	
East Riding	<1%	
TOTAL IMPORTED	723,000	346,000
TOTAL SAND AND GRAVEL CONSUMED	1,402,000	914,000

3.35. Both Table 9 and Table 10 show that sand and gravel resources predominantly travel regionally, with smaller volumes moving further afield. Ultimately the market determines how far it will travel.

3.36. Overall, the survey concludes that Nottinghamshire imported 346,000 tonnes of sand and gravel and exported 579,000 tonnes, meaning that Nottinghamshire continues to be a net exporter of sand and gravel.

Sales of sand and gravel in the East Midlands

3.37. The last EMAWP Annual Monitoring Report was published in 2024, which contains 2023 sales information. The report details how in 2023, sales of land won sand and gravel across the region was 4.9 million tonnes, a 18% decrease in sales from 2022 and the lowest level in the last 10 years, including 2020 which was impacted by the pandemic. A decline in sales was seen across all authorities in the East Midlands, with Lincolnshire and Northamptonshire only seeing a very small decline.

- 3.38. Looking at each authority's LAA in the EMAWP which contains 2024 sales data, which is the latest publicly available information, all authorities, apart from North and West Northamptonshire, also saw a decline in sand and gravel sales. Whilst Leicestershire saw a dramatic decline, Derbyshire and Lincolnshire saw a small decline. For Northamptonshire though, sales increased by 56% due to a quarry commencing production.
- 3.39. Nottinghamshire was therefore not the only authority to experience a decline in 2023 and 2024, with local sales reflecting what occurred regionally.

Crushed Rock (including aggregate limestone)

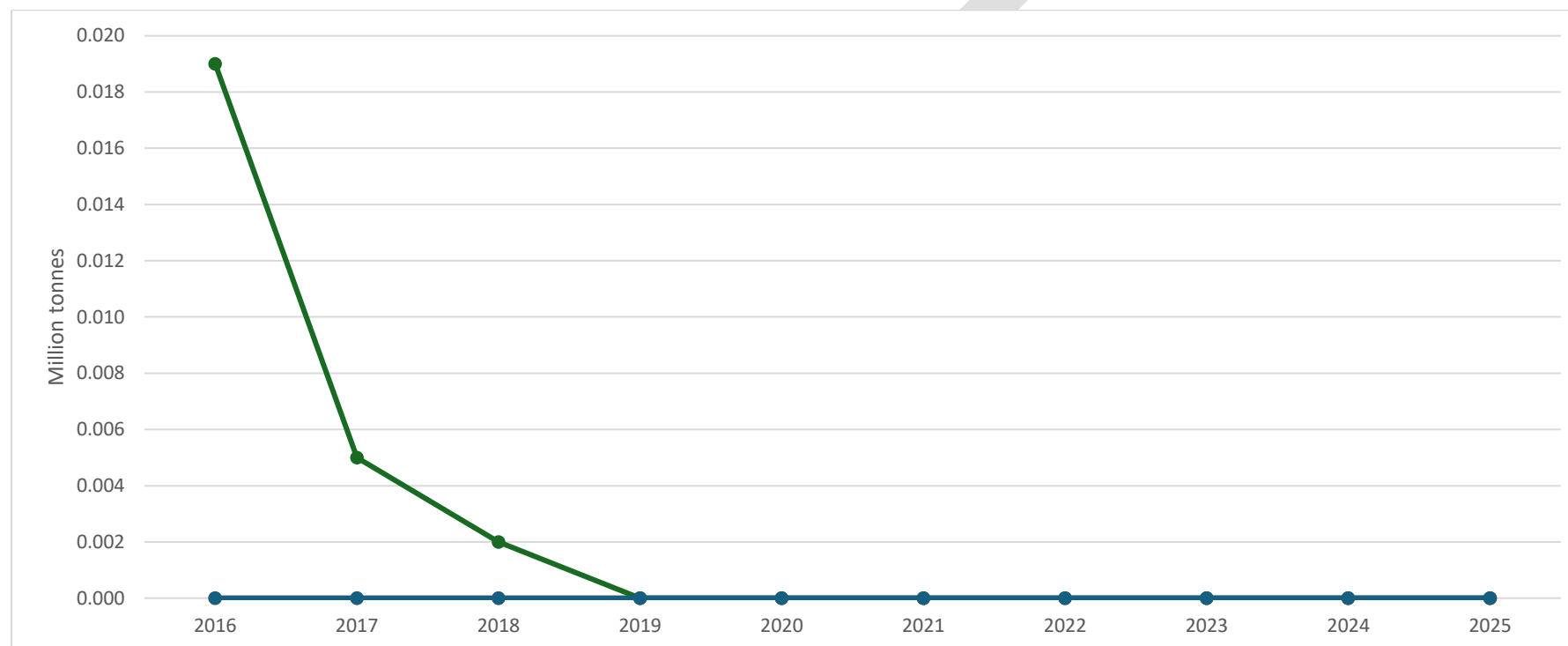
Sites

- 3.40. Nottinghamshire only has one dedicated aggregate limestone quarry at Nether Langwith which was originally opened to supplement a much larger quarry in Derbyshire. The site though has been mothballed since 2007, with no extraction taking place with the site currently used as a training centre. Nether Langwith has permission to extract limestone until 2035, with a potential production capacity of 250,000 tonnes per annum.
- 3.41. There is also a permitted building stone quarry at Linby, known as Yellowstone, which can produce some limestone aggregate. However, the tonnage is very small with the site also currently inactive.

Sales

- 3.42. With Nether Langwith mothballed since 2007, crushed rock sales (predominately aggregate limestone) in Nottinghamshire have stood at zero over the past 10 – year period as shown in Figure 3 below. Nottinghamshire therefore is reliant upon importing crushed rock to meet demand, which is discussed below.

Figure 3: Sales of limestone between 2016 – 2025 against the 10 – year and 3 – year average sales figure



Legend	2016	2017	2018	2019	2020	2021	2022	2023	2024	2025
Actual sales	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00
10yr average	0.019	0.005	0.002	0.00	0.00	0.00	0.00	0.00	0.00	0.00
3yr average	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00

10 – year and 3 – year sales average

- 3.43. With the sales since 2009 being at 0 for crushed rock, the 3 – year average is therefore also 0. As shown in Figure 3, the 10 – year average slowly falls from 0.019 in 2016 to 0 by 2019 as the small sales figures from 2006, 2007 and 2008 drop out of the average.

Permitted reserves and landbank

- 3.44. Permitted reserves currently total 3.34 million tonnes. Since both the 10 – year and 3 – year sales averages stand at 0, calculating a landbank using these figures is unrealistic.
- 3.45. How to calculate future provision rate and so demand for crushed rock in Nottinghamshire and Nottingham will therefore need to rely upon other local information. For example, considering how much aggregate is imported from other mineral authorities. What the findings where for imports of crushed rock from the latest national survey are discussed in chapter 6.
- 3.46. Imports of crushed rock **Table 11** showing this continues to be predominantly sourced from Derbyshire, Leicestershire and Doncaster as found in 2019. Again, how far aggregates travel will be dependent upon the market.

Table 11: Source of crushed rock consumed in Nottinghamshire by mineral planning authorities

Source authority	2019 Survey	2023 Survey
	Percentage band of consumption	Percentage band of consumption
Cambridgeshire	<1%	
Derbyshire	30 – 40%	40 -50%
Leicestershire	20 – 30%	20 – 30%
Lincolnshire	<1%	1 – 10%
North Northamptonshire		1 – 10%
Peak District	1 – 10%	1 – 10%
Rutland		1 – 10%
Durham	<1%	
Northumberland	1 – 10%	
Northumberland National Park	<1%	<1%
Cumbria	<1%	
Powys	<1%	1 – 10%
Gloucestershire		<1%
Shropshire	<1%	<1%

Source authority	2019 Survey	2023 Survey
	Percentage band of consumption	Percentage band of consumption
Staffordshire	1 – 10%	1 – 10%
Telford and Wrekin	10 – 20%	
Warwickshire	<1%	<1%
Doncaster	10 – 20%	10 – 20%
Yorkshire Dales	<1%	<1%
Total Consumption	1,194,000	904,000

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

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

Sales of crushed rock in the East Midlands

3.49. With Nottinghamshire being reliant upon imports, particularly from other East Midland authorities, monitoring sales across the East Midlands is an essential indicator of overall demand.

3.50. In 2023, the East Midlands recorded aggregate sales of 26.677 million tonnes, a small decrease from 28.284 million tonnes in 2022. All authorities producing crushed rock saw a decline other than Derbyshire who saw a slight increase in sales.

3.51. However, looking at the latest publicly available information in the [Derbyshire LAA \(2025, containing 2024 sales data\)](#), [Leicestershire LAA \(2025, containing 2024 sales data\)](#), [Lincolnshire LAA \(2026, containing 2024 sales data\)](#) and [Northamptonshire LAA \(2025, containing 2024 sales data\)](#), all authorities show an increase in crushed rock sales in 2024.

3.52. It is also noted that Derbyshire and Lincolnshire in their LAA have chosen to use the 3 – year sales average as their provision rate to calculate their landbank. This is because the 3 – year sales average is deemed to be the most representative of current and future demand unlike the 10 – year sales average.

Alternative aggregates

- 3.53. The NPPF requires mineral planning authorities within their LAA to assess all supply options for aggregates. This includes marine dredged aggregates and secondary and recycled sources.

Marine won sand and gravel

- 3.54. With Nottinghamshire and Nottingham being landlocked, there is no local production of marine won sand and gravel. The National Aggregates Survey in 2023 also confirmed that no marine won sand and gravel was imported into Nottinghamshire. This is likely due to the local availability of land won material and the high costs involved in transporting the mineral long distances. It is therefore assumed that marine sources are not a significant issue for Nottinghamshire.

Secondary and recycled aggregates

- 3.55. As highlighted in the Alternative Aggregates section of Chapter 2, sources of alternative aggregates in Nottinghamshire include construction and demolition waste, power station ash, road planings and rail ballast. Each of these alternative aggregates are taken in turn below.
- 3.56. It should be noted that local data for alternative aggregates is limited, with no sales data existing for specific types of recycled or secondary aggregates.

Construction and demolition waste

- 3.57. Construction and demolition waste is made up of a range of materials including rubble, metals, glass, plastic and other construction materials. Approximately 83% of construction and demolition waste has been re-used or recycled. Old concrete and rubble are often crushed on site using mobile processing plant and used in situ as bulk fill. The remainder of the materials, such as metal, is taken off site and sent to be processed elsewhere.
- 3.58. Using the Environment Agency Waste Data Interrogator, an estimate of the amount of material that could be used as recycled or secondary aggregate can be made. Using the 2024 data, the latest available, this is estimated at 391,052 tonnes.
- 3.59. The interrogator can also be used alongside local knowledge to identify facilities in Nottinghamshire and Nottingham that could potentially handle recycled and secondary aggregates. Using this method, 28 active facilities are identified which are listed in [Appendix 1](#).

Power Station Ash

- 3.60. Fly ash and furnace bottom ash (FBA) from power stations can be used as alternatives to virgin aggregates in the manufacture of concrete, cement and

other construction materials. Nottinghamshire in 2014³ did have three operational power stations which produced around 1.7 million tonnes of ash. There is limited local information as to how much of the ash is sold, but nationally around 70 per cent of total fly ash and 100 per cent of FBA produced was sold for use in construction products and engineering materials. The remaining material is often stored in stockpiles and can be sold at a later date⁴.

- 3.61. However, all coal-fired power stations are now closed, with Ratcliffe-on-Soar being the last to close in October 2024. Whilst the closure of the power stations means no new FBA and PFA (Pulverised Fuel Ash) will be produced, there are deposits of PFA at the power stations that could be extracted. For example, planning permission was granted in September 2024 for extraction of 6.5 million tonnes of disposed PFA from Cottam power station in Lound. PFA will therefore continue to be a potential alternative aggregate in the aggregate market until deposits are depleted.

Road Planings

- 3.62. Road planings are produced as a result of highway resurfacing schemes and can be used as a recycled aggregate to form a range of surfaces such as car parks, driveway or tracks. The availability of this material will vary depending on the level of highway maintenance being carried out at any given time. There is no specific data available for this recycled aggregate.

Rail Ballast

- 3.63. Worn out rail ballast is taken by rail to recycling centres for crushing into aggregate. As this material comprises high quality limestone or granite it can be re-processed for high- grade uses. There are approximately 7 rail ballast recycling sites across the country, with one of these located at Toton railway sidings in Stapleford within Broxtowe Borough. With the facilities presence, this is therefore a recycled aggregate that is produced in Nottinghamshire.

Local Production conclusion

Sand and gravel

- 3.64. In Nottinghamshire, sales for sand and gravel have remained subdued compared to previous years though did show a slight recovery in 2025 following the flooding events which impacted sales in 2024 and 2023. Subdued sales show the impacts of 2 permitted quarries remaining dormant and the economic uncertainty that remains in the market.
- 3.65. Despite 2 quarries not actively being worked in 2025, permitted reserves continued to fall compared to previous years which reflects the absence of

³ East Midlands Aggregate Working Party - Annual Survey and Report 2014

⁴ UK Quality Ash Association

newly permitted reserves at either new sites or extensions to the permitted sites.

- 3.66. The Councils are, as part of developing a new Minerals Local Plan, exploring the potential provision rate that should be used to calculate the future demand and need for sand and gravel. Therefore, a landbank has been calculated using several provision rates, with all being over the minimum 7-year requirement. The options around future provision rate is discussed below in chapter 6.

Sherwood Sandstone

- 3.67. After sales peaking in 2024 for Sherwood Sandstone, sales in 2025 fell to similar levels seen in 2023. This suggests that the peak in 2024 was not an indication of a sustained increase in demand for Sherwood sandstone.
- 3.68. Like sand and gravel, permitted reserve levels also fell compared to 2024 which indicates sites being worked out and the reserve not being replaced through new permissions.
- 3.69. The Councils are, as part of developing a New Minerals Local Plan, exploring the potential provision rate that should be used to calculate the future demand and need for Sherwood sandstone. Therefore, a landbank has been calculated using several provision rates, with all being over the minimum 7-year requirement. The potential future provision rate is discussed below in chapter 6.

Crushed rock

- 3.70. With the only permitted crushed rock site in Nottinghamshire remaining dormant, sales in 2025 remained at zero and the permitted reserve levels remained static. The need for crushed rock therefore continues to be met by importing aggregate from other authorities, mainly from Derbyshire and Leicestershire.
- 3.71. The Council is currently considering how to calculate future need for crushed rock as part of the new Minerals Local Plan. This is discussed further in chapter 6.

Alternative aggregates

- 3.72. Whilst there is no marine sand and gravel production or consumption in Nottinghamshire, recycled and secondary aggregates continue to play a crucial role in meeting wider aggregate demand across Nottinghamshire. However, the extent to which recycled aggregates can replace primary aggregates will depend on various factors, such as their availability, cost, and the technical specifications required for end uses. Since recycled aggregates are readily

available on the open market, their contribution has already been accounted for in calculations of future primary aggregate demand.

- 3.73. The British Geological Survey and Minerals Products Association also acknowledge that further significant growth for alternative aggregates is likely to be limited due to the high levels that are already being recycled along with changing construction methods which are also likely to reduce the availability and quality of these materials in the future.
- 3.74. Planning policies relating to recycled and secondary aggregates can be found in the Nottingham and Nottinghamshire Waste Local plan (adopted September 2025).

4. Local considerations for future demand

- 4.1. To provide a sufficient and timely supply of aggregates over the plan period, the NPPF requires the LAA to also consider any other relevant local information alongside the sales average that may impact future demand. This chapter therefore considers local factors that may influence future aggregate demand and concludes how these should be considered when considering future demand.
- 4.2. Chapter 5 then collates together the findings of the local factors and local production to consider how aggregate provision should be calculated for the new Minerals Local Plan.

Population Forecasts

- 4.3. The population of Nottinghamshire (the geographic County, including Nottingham City) is expected to grow from approximately 1.18 million in 2024 to around 1.28 million by 2047, based on the latest Office for National Statistics data⁵. This growth is anticipated to be concentrated in the major urban areas of the Nottingham conurbation, Newark, and Mansfield.
- 4.4. However, it remains challenging to make direct comparisons between population growth and minerals use. There is the assumption that as population grows, so will aggregate consumption to ensure provision of housing and infrastructure. However, there is no quantifiable way in which to link population growth to sales.

House building

- 4.5. During the construction of new houses, a range of aggregate minerals will be consumed including sand and gravel for uses such as concrete, Sherwood Sandstone for mortar, clay for bricks and tiles along with crushed rock for more general construction uses. Data from the Minerals Products Association estimates that a typical new house uses up to 200 tonnes of aggregates and associated mineral products⁶, although the actual quantities for each type of aggregate are unclear. The Minerals Products Association estimate that new house building only accounts for around 20% of overall aggregate consumption.
- 4.6. To understand how future house building may impact on aggregate demand, the past housing delivery in the area needs to be considered alongside the future forecasted demand for housing.

⁵ [Population projections - Office for National Statistics](#)

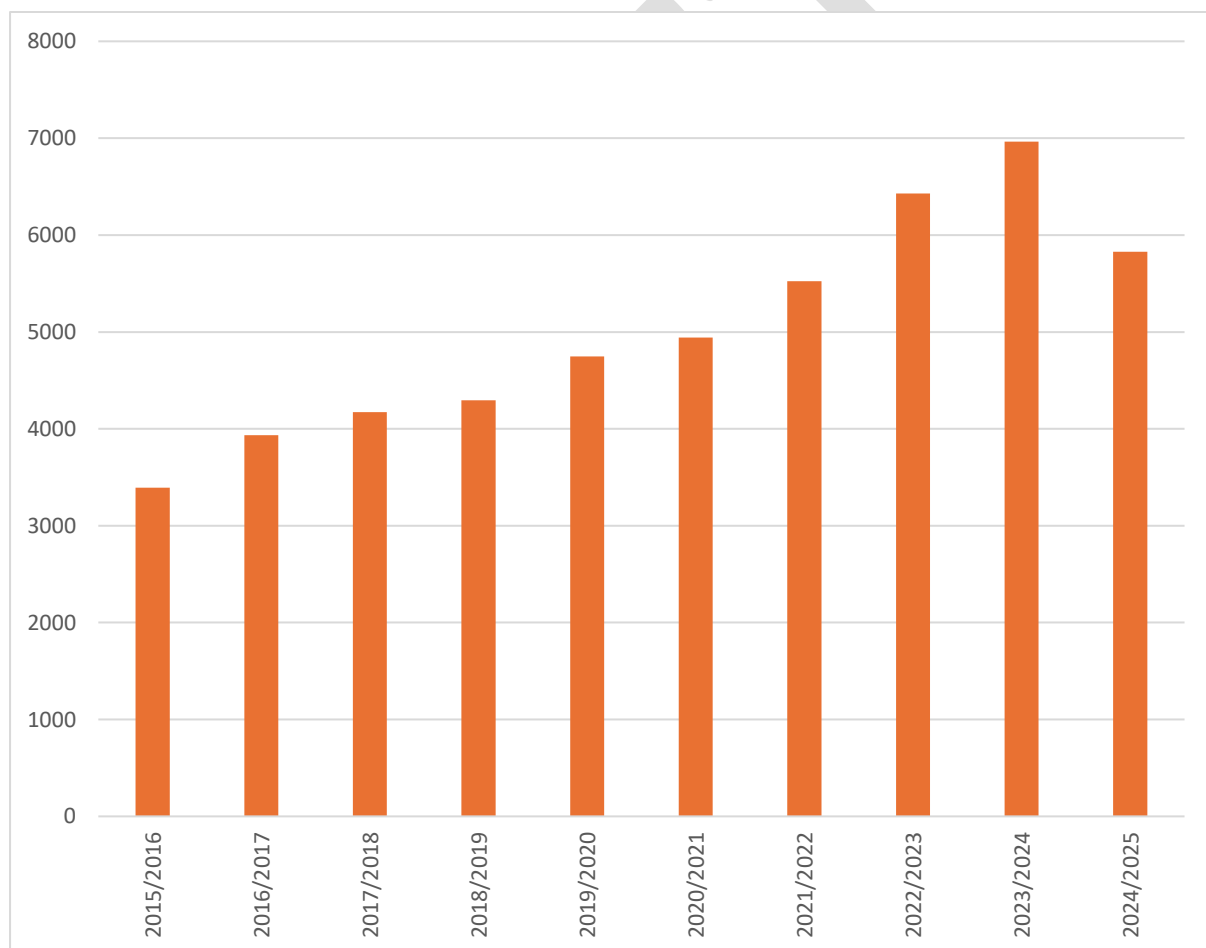
⁶ [Mineral Products Association. Profile of the UK Mineral Products Industry 2023 edition.](#)

Past housing delivery

4.7.

- 4.8. Figure 4 below shows the level of housing completions in the past 10 years. It indicates that completions across Nottinghamshire and Nottingham have been increasing, with completions in the financial year of 2023/ 2024 reaching a new high of 6,910 dwellings per annum. There was a decline in completions in 2024/ 2025, at 5,829 dwellings, though this was still higher than levels pre - 2021.

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



Future housing requirements

- 4.9. The higher level of house building seen recently is expected to continue in the future, especially with the Labour Government's focus on tackling the housing crisis and promising to deliver 1.5 million new homes by 2029. To achieve this ambitious target, a new housing need methodology was introduced, which took the combined requirement for Nottinghamshire and Nottingham from 4,736

dwellings per annum to 5,627. The past completions in Figure 4 show this level of house building, and beyond, can be achieved in the area.

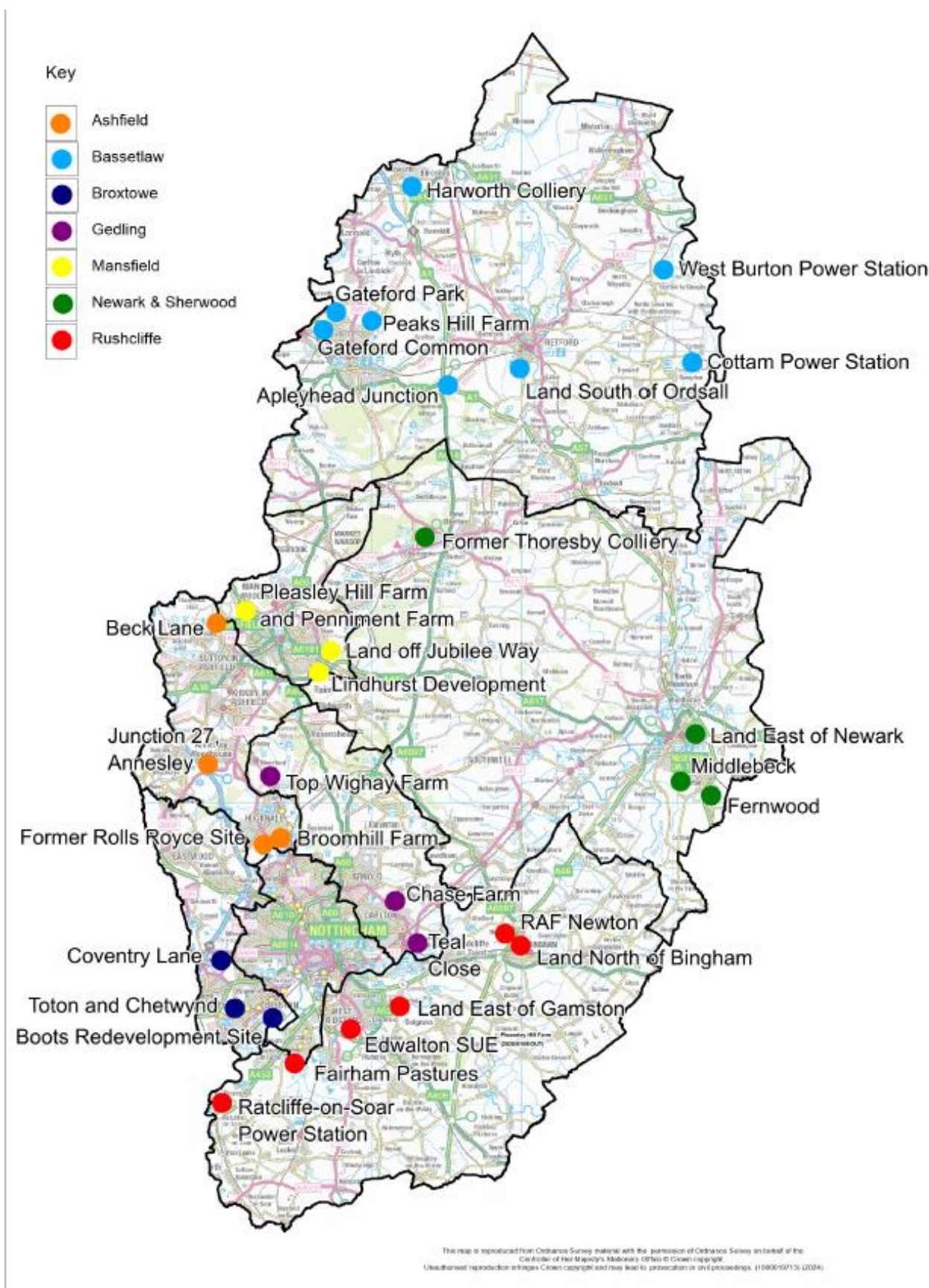
- 4.10. Based on the most recent housing trajectory data available from the districts and boroughs, shown in Table 12 below, house building rates in Nottingham and Nottinghamshire are forecasted to peak in the 2031/ 2032 financial year. Other than in 2026/ 2027, each year is forecasted to deliver the new housing need requirement of 5,627 dwellings per annum. After the year 2033/34, there is no publicly available trajectory for Mansfield and Newark and Sherwood and thus the total dwellings forecasted fall. This is not though an indication that no housing will be built in these areas in the future and these Councils will plan to achieve to meet their housing targets through their new Local Plans. When a trajectory is published, Table 12 will be updated with the latest figures.
- 4.11. A key part of the future housing delivery across the area are reliant on larger, allocated and permitted strategic growth sites which are over 500 dwellings. Plan 2 below shows the spread of these sites across Nottinghamshire. Such large – scale developments are also often accompanied by new infrastructure to support growth, for example new roads and new schools, which will also require construction material and so aggregates.

Table 12: Housing trajectory by Local Authority

Local Authority	25/26	26/27	27/28	28/29	29/30	30/31	31/32	32/33	33/34	34/35	35/36	36/37	37/38
Ashfield	621	630	536	485	307	410	388	186	180	161	179	161	161
Bassetlaw	474	426	622	675	864	879	671	476	504	490	394	228	216
Broxtowe	618	616	584	653	693	644	574	508	471	461	461	461	431
Gedling	678	588	476	544	619	862	997	1032	866	762	665	619	583
Mansfield	697	281	453	533	631	623	406	317	352				
Newark	297	575	732	892	941	861	842	732					
Nottingham city	3127	1387	1281	1668	1801	1126	3507	2428	1514	1138	933	866	866
Rushcliffe	905	1026	999	994	752	829	746	687	661	661	852	560	417
TOTAL	7,417	5,529	5,683	6,444	6,608	6234	8,131	6,366	4,548	3,673	3,484	2,895	2,674

**Please note that figures beyond 2033/2034 are not publicly available for Mansfield and Newark and Sherwood. This does not mean though that no housing will be built in these years in these areas.*

Plan 2 – Nottinghamshire Strategic Development Sites



Implication on aggregate demand

- 4.12. Whilst there is a rough estimate of how much aggregate is needed for a new home, the increased housing completions in recent years is not reflected by the local sales of aggregates or increased imports as shown in the national survey. The reason for this is currently unknown.
- 4.13. Considering that housing levels have reached levels that meet the new housing targets without aggregate consumption increasing, there is not enough quantifiable evidence to provide a reliable method for forecasting future demand based upon housing alone. However, future housing growth should not be completely dismissed, with this planned growth needing to be considered alongside other local factors.

Infrastructure Projects identified for Nottinghamshire

- 4.14. There are several potential infrastructure projects planned in Nottinghamshire which could impact local aggregate demand. This includes road improvement schemes as well as potential large-scale developments, with these detailed below.

Road Improvement Schemes

- 4.15. All potential road improvement schemes in Nottinghamshire are listed below.

A46 Newark Bypass

- 4.16. This scheme will widen a 6.5km section of the A46, improving traffic flow and journey reliability on this strategic route. The bypass will connect Lincoln to Warwick, and it is expected to reduce congestion around Newark-on-Trent. The scheme was granted a Development Consent Order by the Secretary of State for Transport in October 2025 but a start date for construction remains to be confirmed.

A614/ A6097 Junction Improvement

- 4.17. This major road improvement scheme involves a number of junctions along the A614 and A6097 corridor. Funding was confirmed for this scheme on the 18th of September 2025, with work anticipated to commence in spring/ summer of 2026 and be completed in late 2028.

A52 Nottingham Junctions

- 4.18. Improvement works on the A52, including the Nottingham Knight and Wheatcroft roundabouts, are planned. These junctions currently experience high traffic volumes, and the upgrades are designed to manage congestion more effectively. The works are expected to occur in 2026 and 2027.

Nottinghamshire County Council major resurfacing scheme

- 4.19. The County Council is currently undertaking a major resurfacing scheme, adding 44 individual resurfacing projects to the scheme in 2026.

Large Scale Development Projects

- 4.20. There are currently three known large – scale projects in and around Nottinghamshire that will require significant volumes of minerals.

Spherical Tokamak for Energy Production (STEP)

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

Trent Clean Energy Supercluster Vision

- 4.24. The allocation of West Burton for the STEP project has led to potential future opportunities in the wider area, known previously as megawatt valley due to the cluster of old coal fired power stations in West Burton, Cottam and High Marnham. The Trent Supercluster Vision looks to build upon this opportunity to deliver wide scale regeneration that will lead to the delivery of innovation for clean energy as well as making the area an outdoor leisure destination.
- 4.25. The details for this remain vague currently and therefore the known impact on future mineral demand is limited. As with STEP, the Councils will continue to monitor the progress of this.

East Midlands Gateway Phase 2

- 4.26. Following development of the logistic park East Midlands Gateway near East Midlands airport, just outside the southern boundary of the County, plans have now been submitted for a second phase of industrial and logistic development. The applicant has identified that Nottinghamshire as a neighbouring authority will be affected by the project in terms of minerals and waste.
- 4.27. Estimates of material requirements have been given and the applicant is in contact with Nottinghamshire, Leicestershire and Derbyshire County Council. It is estimated that the requirement for the project is between 1-5% by volume of the regional baseline availability.

Ratcliffe on Soar redevelopment

- 4.28. Following the closure of the Ratcliffe on Soar power station and to aid in its redevelopment, the power station site now has a Local Development Order granted by Rushcliffe Borough Council to enable large scale development to be taken forward. Part of the site also falls within the East Midlands Freeport.
- 4.29. No specific timeframes are available yet on when development may occur on the site and so the impact on future mineral demand is limited. As with other projects, the Councils will continue to monitor the progress of this site.

EM. EX Worksop Distribution hub

- 4.30. A large-scale distribution and logistics hub, developing up to 4.5 million square feet of employment space, was granted permission at the Apleyhead Junction near Worksop. It is anticipated construction on enabling infrastructure will begin in 2026.

Implication on aggregate demand

- 4.31. The above schemes show anticipated growth in Nottinghamshire which are likely to increase the demand for aggregates, particularly within their construction periods. Whilst there is no quantified amount of aggregates, the potential for future demand of aggregates for these projects, especially for the large-scale project of STEP, should be considered when determining a provision rate for future demand for aggregates in the new Minerals Local Plan.

Future demand from neighbouring authorities

Future demand from Rotherham and Doncaster Markets

- 4.32. The Rotherham and Doncaster Local Aggregates Assessment 2024 (2023 sales data) reports that although its sand and gravel landbank remains at 13 years, sharp sand reserves are limited. Consequently, the region will continue to rely on imports of sand and gravel from Nottinghamshire and neighbouring authorities.
- 4.33. Given that Nottinghamshire has traditionally supplied a large proportion of sand and gravel to the Rotherham and Doncaster markets from the Idle Valley and North Nottinghamshire, their future requirements are unlikely to be completely new demand, and this has been taken into account as part of the 10-year average sales figures. It is likely that in the short term, output from the Idle Valley and north Nottinghamshire will be maintained at current levels from existing permitted reserves.
- 4.34. A planning permission at Sturton Le Steeple with an estimated output of 500,000 tonnes per annum was initially implemented in 2017. Aggregate Industries (now Holcim) acquired the mineral rights to extract sand and gravel

at quarry in June 2023 and have since progressed the development of the quarry in consultation with key stakeholders. This site will provide a valuable long-term source of sand and gravel to supply North Nottinghamshire and the Rotherham and Doncaster markets for approximately 20 years.

Future demand from Leicestershire

- 4.35. The 2025 Leicestershire LAA, containing 2024 sales, states that the existing sites have a total potential production capacity of around 1.45 million tonnes per annum, which means that they would be capable of producing sufficient material to satisfy the level of provision identified in the adopted Minerals and Waste Local Plan. The sites would not however be able to meet the County's future requirements without the benefit of extensions to their permitted operations. Given sand and gravel landbank currently stands just over 2 years additional sand and gravel may need to be sourced from reserves outside the county.
- 4.36. Some sand and gravel is already exported from Nottinghamshire to Leicestershire and in 2023, 20 – 30% of the total sand and gravel consumed in Leicestershire was supplied from Nottinghamshire.
- 4.37. In the future additional sand and gravel from Nottinghamshire could potentially serve Leicestershire, however at this stage it is difficult to quantify the amount as it will depend on the actual shortfall in the future and the amount of sand and gravel being supplied by other Mineral Planning Authorities.

Local consideration conclusion

- 4.38. The above indicates that there is a lot of planned growth in Nottinghamshire over the coming years, especially with several large-scale projects anticipated over the new Minerals Local Plan period. All these projects will require aggregates to develop them.
- 4.39. Whilst a specific amount cannot be used to quantify a specific future demand, the Councils do recognise that these planned projects are likely to impact future demand. To ensure this is reflected in the new Minerals Local Plan, the Councils suggest that the provision rate for aggregates, particularly for sand and gravel, should consider these factors alongside the 10-year and 3-year sales average to ensure the Plan can accommodate this future growth and so plan positively and ensure a sufficient supply. How this may be incorporated into the provision rate for each aggregate is discussed below in chapter 6.

5. National and regional considerations for future demand

- 5.1. The NPPF requires that mineral planning authorities consider the advice of the Aggregate Working Party and any national and sub-national guidelines on future provision when making provision for minerals in their Minerals Local Plan. This chapter considers how these matters should inform the provision rate used to calculate future demand for the new Nottinghamshire Minerals Local Plan 2045.

National and Sub – National Aggregate Guidelines

- 5.2. Prior to the introduction of the NPPF, the supply of land-won aggregates in England was based on national and sub national guidelines for aggregates provision published by the Department for Communities and Local Government (DCLG). The most recent guidelines, covering the period 2005 – 2020, were published in 2009.
- 5.3. The East Midlands Aggregate Working Party used these guidelines to produce draft apportionment figures for each MPA. The figures were then approved by the East Midlands Regional Assembly in 2010 and were to be incorporated into the Regional Plan via the review process. However, due to the abolition of the Regional Spatial Strategy the figures were never adopted.
- 5.4. The guidelines for the East Midlands stood at 174 million tonnes for sand and gravel and 500 million tonnes for crushed rock over the 2005 – 2020 period. For Nottinghamshire the guidelines were equivalent to 3.81 million tonnes per annum (a combined figure for sand and gravel and Sherwood Sandstone).
- 5.5. It was decided at the Aggregate Working Party meeting in February 2013 that the draft 2009 figures were considered out of date as they were only based on aggregate output from a period of economic growth, and should, therefore, not be considered when determining the new apportionment figures.
- 5.6. It is understood that following the 2024 national elections and the 2023 National Aggregate Survey that MHCLG is considering the option of issuing new aggregate guidelines at national and regional level. However, no decision has yet been made and remains a subject to further discussion with Ministers.
- 5.7. Therefore, the new Nottinghamshire Minerals Local Plan 2045 will not consider the apportionment figures when considering how to calculate future aggregate provision. If new guidelines are published, these will be taken into consideration during the Plans development.

East Midlands Aggregate Working Party (EMAWP)

- 5.8. The LAA is circulated to members of the EMAWP each year for feedback from neighbouring planning authorities and mineral operators. Any comments are taken into consideration and amendments made where necessary.
- 5.9. As the Councils are embarking on a new Minerals Local Plan, this LAA will form a key background evidence document for the Plan to understand how to calculate future provision rate and so demand. Members of the AWP will be consulted on a draft LAA alongside the scoping document in October 2026, with the LAA then being finalised and published based upon comments received.

6. Calculating aggregate provision and landbank

- 6.1. National policy requires that the following is considered in the LAA and by mineral planning authorities when forecasting future aggregate demand:
- 10 – year sales average
 - 3 – year sales average
 - Any relevant local information
 - Alternative supply options, including marine dredged, secondary and recycled aggregates
 - Advice from the Aggregate Working Party
 - National and sub-national guidelines
- 6.2. The above chapters have considered these matters and identified what should be taken into consideration when calculating the future provision rates and aggregates demand for Nottinghamshire and Nottingham.
- 6.3. Whilst it is deemed that the national and sub-national guidelines and alternative supply options will not influence future demand for the reasons outlined in chapter 5, the Councils believe that the potential future growth planned as outlined in chapter 4 should be considered alongside the 10 – year and 3 – year sales average when deciding future provision rates.
- 6.4. As the Councils are preparing a new Minerals Local Plan under the new plan-making regulations, determining the appropriate provision rates for the three aggregate types in this report is crucial to the future development of the Plan. The Councils have therefore chosen to publish this draft LAA alongside the scoping document for the new Nottinghamshire Minerals Local Plan 2045, to seek feedback on how future demand should be calculated, taking account of average sales, relevant information and future planned growth.
- 6.5. The scoping document and sections below therefore present different options for provision rates for each aggregate which could be used to calculate future demand. The Councils will seek representations on which option should be taken forward, publishing a final LAA when the provision rate is chosen.
- 6.6. No provision rate has been chosen at this time, the Councils will choose provision rates following the Scoping consultation in October 2026. A final LAA with the chosen provision rate will be published once representations made and any further evidence have been considered by the Councils.

Sand and Gravel

- 6.7. As outlined in the Sand and Gravel section in chapter 3, the 10 – year and 3 – year sales average are falling each year as previous higher sales figures fall

out and due to the impact of unprecedented events in 2020, 2023 and 2024. Due to this, the Councils do not consider it appropriate to use the 3 – year sales average as a future annual provision rate, with this not reflective of future demand.

- 6.8.** To also reflect the impact of these unprecedented events on the average, an option which removes the lower sales years is also being considered for the sand and gravel annual provision rate as shown in Table 13.
- 6.9.** As identified in the Local consideration conclusion section in chapter 4, the Councils recognise there is planned large scale projects in the area which are likely to impact future demand for sand and gravel. For example, it is known that the current inactive Sturton Le Steeple quarry will become operational, with the operator indicating that this is predominantly due to the demand in aggregates from the STEP project and any other future developments in the area. The commencement of production at Sturton will also increase sales figures, particularly if the site produces at the anticipated rates of around half a million tonnes. Whilst the closure of East Leake may offset this increase slightly, there is likely still to be an increase in sales. The working of Sturton will also start to lower permitted reserves, particularly if new reserves are not permitted.
- 6.10.** Whilst the impact of planned growth cannot be quantified at this time, the Councils conclude that this growth should be considered alongside the 10 – year sales average to ensure there is flexibility in the new Minerals Local Plan to meet demand and accommodate growth.
- 6.11.** The Councils therefore propose an alternative growth option for the sand and gravel provision rate where the current Plans annual provision rate of 1.7 million tonnes per annum would be used. This option reflects historical data in Nottinghamshire when sales were higher, albeit still lower than pre 2012 sales, and would allow for the Plan to accommodate for growth.

Table 13: Options for annual provision rate for calculating sand and gravel provision over the new Plan period.

Option	Name	Annual provision rate (million tonnes)
A	10 – year sales average	1.20
B	Alternative sales average (2016 -2025 average removing 2020, 2023 and 2024)	1.32
C	Maintaining current Plan provision	1.7

Sherwood Sandstone

- 6.12. The Sherwood Sandstone section in chapter 3 details how the 10 – year sales average and 3-year average trended very closely to each other until the impact of COVID in 2020, which resulted in the 3 – year sales average becoming significantly lower in the following years. However, due to higher sales in 2024, the 3 – year average is now at a higher level than the 10 – year sales average. With sales in 2025 falling back to 2023 levels, there is currently no indication that there is a trend of higher sale levels than both averages.
- 6.13. It is therefore considered that both averages should be considered as a potential provision rate to calculate future demand for Sherwood Sandstone. Particularly as the 3 – year average is the same as the provision rate applied within the current Plan.
- 6.14. It is also considered that a provision rate which removes the impact of the COVID 19 pandemic, which was a rare event, should be an option. The different options for the provision rate based on these are therefore presented below in Table 14.

Table 14: Options for annual provision rate for calculating Sherwood Sandstone provision over the new Plan period.

Option	Name	Annual provision rate (million tonnes)
A	10 – year sales average	0.32
B	Alternative sales average (average from 2016 – 2025 removing 2020)	0.34
C	3 – year sales average	0.37

Crushed rock

- 6.15. As discussed in the Crushed Rock (including aggregate limestone) section of chapter 3, due to the only permitted crushed rock site in Nottinghamshire being inactive, the 10 – year and 3 – year sales average remain at 0. However, as shown in the 2019 and 2023 national aggregate survey this does not indicate that no crushed rock is consumed in Nottinghamshire, with the aggregate imported from neighbouring authorities.
- 6.16. There is therefore a demand for crushed rock in Nottinghamshire, with this likely to increase due to the future growth projects identified in chapter 4. The potential for increased demand is also reflected in other authorities in the East Midlands, with Derbyshire and Lincolnshire using the 3 – year sales average to forecast future demand.

6.17. The Councils have therefore identified only 1 option to calculate future demand for crushed rock in **Table 15**, which primarily relies upon the information provided by the national aggregate minerals survey. The Councils would welcome feedback on whether there are any other options that should be considered.

Table 15: Options for annual provision rate for calculating crushed rock provision over the new Plan period.

Option	Name	Figure of provision rate (million tonnes)
A	Average of imports from 2019 and 2023	1.05



Aerial drone image of Nether Langwith quarry taken by County Council in November 2022.

7. Future Aggregate Provision

Adopted Minerals Local Plan

- 7.1. Currently, the adopted Nottinghamshire Minerals Local Plan (2021) in Policy MP1 identifies the level of demand for aggregates over the plan period (2018 – 2036) based on the provision rates set out in Table 2 in the Plan. Whilst some of this demand could be met by permitted reserves, additional reserves are needed for sand and gravel and Sherwood sandstone to meet the demand. The Plan therefore allocates a mix of extensions to existing permitted quarries and one new quarry in Policy MP2 and MP3. At the time of publication, 2 of the 8 allocations have been granted permission, 1 allocation has been refused permission, though is subject to appeal. A scoping consultation has also been submitted for 2 of the remaining 5 allocations yet to come forward.

As shown in Table 4 and

- 7.2. Table 6 in this LAA, the current 10 – year sales average for all sand and gravel, Sherwood sandstone and crushed rock are below the Plans established provision rate. The same is true for the 3 – year sales average for sand and gravel and crushed rock, with the average for Sherwood Sandstone matching the Plans provision rate of 0.37 million tonnes.
- 7.3. Previously, it was concluded that the demand forecast set out in the Plan did not need to be reviewed as whilst the Plan had a higher forecast then the sales average, this enabled the Plan to accommodate any future growth. This ensured continued supply over the Plan period and would be monitored.
- 7.4. However, when the new Town and Country Planning (Local Planning) (England) Regulations 2026 were published in March 2026, there is now a requirement for all Plans over 5 years old to be replaced. With the Plan being adopted in March 2021, work on a new Minerals Plan under the new regulations is therefore required.

Replacement Nottinghamshire Minerals Local Plan 2045

- 7.5. With the new regulations, the County Council is preparing a new Minerals Local Plan. However, in April 2028 the County Council will be abolished alongside the City Council and District and Boroughs and replaced by two new unitary authorities. To support continuity through this transition and enable the plan to be progressed jointly by the new unitary authorities, which will cover the County's geographic area and Nottingham City Councils area, the County Council and Nottingham City Council have agreed to prepare a Joint Minerals Plan, known as the Nottinghamshire Minerals Local Plan 2045.

- 7.6. As indicated in the published timetable for the Plan, the Councils intend to undertake a scoping consultation in October 2026. As per regulation 45, the scoping consultation will seek representations on:
- Matters relevant to the preparation of the plan, including what the document should contain
 - How the Councils should engage with key stakeholders throughout the preparation of the plan
- 7.7. Establishing a provision rate to calculate future demand for aggregates, which will influence allocations, is a key matter for the Plan and so the Councils wish to seek feedback on this. The scoping document will therefore seek representations on the options outlined for the provision rate as set out in Chapter 6: Calculating aggregate provision and landbank. As the LAA is a key evidence document for ensuring future aggregate provision, the LAA has been published alongside the consultation document in draft form.
- 7.8. Once the consultation has closed and representations considered, the Councils will select a provision rate on which to use to forecast future demand. A finalised LAA will then be published.

8. Conclusion

- 8.1. The provision of sand and gravel is the biggest issue for Nottinghamshire and Nottingham over the plan period. The 10 – year sales average has fallen from 2.05 million tonnes in the LAA published in 2014 to 1.20 million tonnes in this LAA. This decline is largely attributed to the impact of the recession in 2007, followed by a slow recovery in construction activity and changing market demands. Despite the presence of significant sand and gravel resources in the Trent Valley, ongoing economic uncertainties, flooding and shifts towards alternative materials in construction continue to suppress sales figures.
- 8.2. The adopted Minerals Local Plan allocates sites for sand and gravel to ensure demand can be met over the plan period to 2036. However, new regulations introduced mean the Plan must now be updated and replaced, which the Councils are now preparing jointly.
- 8.3. It is noted that there is future growth planned in Nottinghamshire and Nottingham, especially from large scale infrastructure projects such as STEP, which will need aggregates. To allow flexibility in the Plan to meet this growth and demand, the Councils are considering provision rates for aggregates which go beyond the 10 – year sales average. Several options are presented and feedback on these options will be sought during the scoping consultation for the replacement Nottinghamshire Minerals Local Plan 2045.
- 8.4. Feedback and any further evidence will then be considered to help determine the provision rates used to calculate future demand for aggregates in Nottinghamshire and Nottingham to 2045. A finalised LAA will be published once this has been established.

Appendix 1: Aggregate Recycling Sites in Nottinghamshire and Nottingham

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

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