

**Divisions Affected – N/A**

**DELEGATED DECISIONS BY CABINET MEMBER FOR PLACE,  
ENVIRONMENT AND CLIMATE ACTION**

**13 November 2025**

**LOCAL AGGREGATE ASSESSMENT 2024**

**Report by Director of Economy and Place**

**RECOMMENDATION**

The Cabinet Member is **RECOMMENDED** to:

- a) **Approve the Local Aggregate Assessment presented herewith;**
- b) **Authorise the Director for Economy and Place in consultation with the Cabinet Member for Place, Environment and Climate Action to make any revisions and publish the Oxfordshire Local Aggregate Assessment for the calendar year 2024 on the Council website.**










**Executive Summary**

1. Under the National Planning Policy Framework (NPPF), Mineral Planning Authorities should prepare an annual Local Aggregate Assessment (LAA). The NPPF states that the LAA should 'forecast future demand, based on a rolling average of 10 years' sales data and other relevant information, and an assessment of all supply options.'
2. The annual Local Aggregates Assessment (LAA) sets the level of mineral provision for the County Council as the Minerals Planning Authority, to ensure an appropriate supply for Sand and Gravel and Crushed Rock. This provision level, known as the Aggregates Provision Rate (APR) is based on an assessment between the supply and demand of aggregates in Oxfordshire and forecast demand.
3. The data is gathered through annual Aggregates Surveys of mineral operators within Oxfordshire.
4. The LAA provides the most up to date information and evidence to inform mineral planning within Oxfordshire. The latest LAA (Annex 1) covers the calendar year 2024.
5. By supporting the recommendation to adopt the latest LAA, the County Council is endorsing the provision levels as set out in paragraph 9, for use as evidence

for the provision of mineral working in the future Oxfordshire Minerals and Waste Local Plan, and for calculating the Oxfordshire landbank as of the end of 2024.

## Summary of Main Findings

6. Table 1 provides a summary of the main findings in relation to sales, reserves and landbank of Primary Won Aggregates as set out in the LAA for 2024. The arrows indicate an increase or decrease from the findings of the LAA for 2023. For a full summary of Key Data including average 10-year sales and 3-year sales, please see Appendix 1, or for full historic records see the Appendix of the LAA for 2024 (Annex 1).

	<b>LAA (for calendar year 2024) (mt- million tonnes)</b>	
<b>Sharp Sand and Gravel Sales</b>	0.934mt	
<b>Sharp Sand and Gravel Reserve</b>	6.177mt	
<b>Sharp Sand and Gravel Landbank* (7 years or more)</b>	6.3 years	
<b>Soft Sand Sales</b>	0.132mt	
<b>Soft Sand Reserve</b>	3.021mt	
<b>Soft Sand Landbank* (7 years or more)</b>	13 years	
<b>Crushed Rock Sales</b>	0.981mt	
<b>Crushed Rock Reserve</b>	3.359mt	
<b>Crushed Rock Landbank* (10 years or more)</b>	3.5 years	

**Table 1: Summary of mineral findings 2024**

\*The landbank is calculated by dividing the mineral reserve by the LAA provision rate

7. Detailed assessments of supply and demand were carried out. These assessments also included evidence of sales figures, economic forecasts, infrastructure requirements and population and housing. Also considered were the latest mineral imports and exports figures for 2023, which were published in 2025 by the Ministry of Housing, Communities and Local Government (MHCLG) and the British Geological Survey (BGS).
8. Following these considerations, it is proposed that the Aggregates Provision Rates are kept the same as the 2023 LAA for Sharp Sand and Gravel, Soft Sand and Crushed Rock. Therefore, the APRs for the 2024 LAA are:
- **Sharp Sand and Gravel – 0.986mtpa**
  - **Soft Sand – 0.235mtpa**
  - **Crushed Rock – 0.964mtpa**
  - **Recycled and Secondary Aggregates - 0.926mtpa**

9. The Core Strategy, Policy M2, sets out the amount of minerals to be provided over the Plan Period. This was based on the LAA 2014 Aggregates Provision Rates. Table 2 sets out the remaining mineral requirements to meet the Core Strategy Requirements.

	<b>Core Strategy remaining Requirements identified through LAA</b>
Sharp Sand and Gravel	3.022mt
Soft Sand	0
Crushed Rock	0

**Table 2: Core Strategy Remaining Mineral Requirements (mt- Million tonnes)**

10. As the Minerals and Waste Planning Authority, the County Council has a duty under the NPPF to “plan for and maintain a steady and adequate supply of minerals”. This is measured through the LAA and our landbank provision.
11. Our current landbank for Soft Sand is above the 7-year requirement in the NPPF, however upon completion of the 2024 LAA, the Sharp Sand and Gravel landbank has now fallen below the 7-year requirement to 6.8 years, and the Crushed Rock landbank remains significantly below the 10 years required, and at the end of 2024 it was 3.5 years.
12. This is the sixth consecutive year Crushed Rock has fallen below the required level. A trigger was reached for a policy review of the Oxfordshire Minerals and Waste Core Strategy (2017) in 2019, particularly Policy M2 for Crushed Rock. This policy review will be addressed through a new Minerals and Waste Local Plan.

## **Local Aggregate Assessment**

### **Sales**

#### **Primary won aggregate**

13. Appendix 1 of the LAA for 2024 sets out the sales figures for Sharp Sand and Gravel, Soft Sand and Crushed Rock from 2003-2024, alongside the 10-year and 3-year sales averages for each mineral type.
14. In 2024, both Crushed Rock and Soft Sand saw a decrease in their sales compared with 2023, of 2.1% and 35% respectively. There has been an increase in the sales of Sharp Sand and Gravel of 7% compared to 2023. There has been a decrease in the 3-year average sales across all aggregate types, and in the 10-year average sales for Soft Sand and Crushed Rock. There was a small increase in the 10-year average sales of Sharp Sand and Gravel.

#### **Recycled and Secondary Aggregates**

15. In 2023 estimated sales in Recycled and Secondary Aggregate were 0.447mt. The Survey response from recycled and secondary operators to the 2024 survey was once again poor, with a 7% return rate. Therefore, as in the LAA for 2023, the recycled and secondary aggregate figure within this LAA is calculated from the Environment Agency's Waste Data Interrogator (WDI), and the latest available data at the time of preparing the LAA is for 2023. 2024 data will be included with the LAA for 2025.

### **Rail Depots**

16. There are three railhead depots in Oxfordshire used for importing aggregates, these are safeguarded in the Oxfordshire Minerals and Waste Local Plan Core Strategy. These depots import mainly Crushed Rock, with minimal Sharp Sand and Gravel and it is understood that this is mostly from the South West. There is planning permission for a further railhead aggregate depot at Shipton on Cherwell, but this has not yet been developed. There is also a depot at Hinksey Sidings, Oxford but this is used solely by the rail industry to bring in rail ballast for internal use on the rail network; it is currently operational.
17. Oxfordshire figures for imports of aggregate by rail are confidential because they are derived from returns for only two companies. However, due to a number of planning decisions in 2021, Oxfordshire's rail depot capacity increased to at least 3.5million tonnes and it is considered that imports and sales remain significant through rail depots in Oxfordshire.

### **Supply**

18. Oxfordshire is a mineral rich county which currently has 21 quarries with 8 active Sharp Sand and Gravel permissions, 8 active Soft Sand permissions and 12 active Crushed Rock permissions (some sites produce more than one variety of mineral types within them). We are one of the major mineral producers in the Region, even nationally, and we have more Crushed Rock producing sites than the rest of the South East combined.

### **Sand and Gravel**

19. At the end of 2024, Oxfordshire had eleven Sand and Gravel quarries, eight of which were active.
20. Total permitted reserves of Sharp Sand and Gravel in Oxfordshire at the end of 2024 were 6.177mt.

### **Soft Sand**

21. In Oxfordshire, at the end of 2024, there were eight sites with planning permission for Soft Sand extraction.
22. Total permitted reserves for Soft Sand in Oxfordshire at the end of 2024 were 3.021mt.

## **Crushed Rock**

23. At the end of 2024, there were fourteen sites with planning permission for Crushed Rock extraction, twelve of which are active.
24. Total permitted reserves for Crushed Rock in Oxfordshire at the end of 2024 were 3.359mt.

## **Recycled and secondary material sites**

25. At the end of 2024, permitted capacity taken from planning decisions, application statements and previous survey finding was 1.493 million tonnes.

## **Rail Depots**

26. Oxfordshire has four permitted rail depots, three of which are operational. From permissions it is known that currently Oxfordshire has rail depot capacity of over 3.5 million tonnes.

## **Imports and Exports**

27. Every county in the UK has to import aggregates because none possess the geology necessary to produce all the types of aggregate required. All sales which reflect supply and demand are tracked in the four or five yearly national aggregate surveys.
28. The most recent, the 2023 Aggregates Minerals Survey for England and Wales (AM2023), was undertaken by British Geological Survey (BGS) under a contract with the Ministry of Housing, Communities and Local Government (MHCLG) and published August 2025. The AM2023 sets out aggregate movements at a sub-regional level.
29. The AM2023 highlights that Oxfordshire is a net exporter of sand and gravel but has shifted from a net exporter of crushed rock in previous surveys to being a net importer in 2023.
30. In 2023, Oxfordshire experienced a notable increase in crushed rock imports. This surge is believed to be associated with the construction of the High Speed Rail 2 (HS2) national infrastructure project, which passes through and lies in close proximity to parts of the county. Given the scale and significance of HS2, and its active construction phase within the area during 2023, this trend warrants close monitoring in future surveys to determine whether it represents a sustained pattern or a temporary spike.

## **Demand**

31. The NPPF requires that the level of future provision within the LAA should be based, in part, on the rolling average of 10 years' sales figures. It also requires "other relevant local information" to be taken into account.

32. Therefore, detailed assessments of supply and demand were carried out. These assessments included evidence of sales figures, economic forecasts, infrastructure requirements, and population and housing. Also considered were levels of inflation, and Central Government growth agenda alongside the details of the 2023 mineral imports and exports figures from MHCLG and BGS.
33. The evidence available suggests that economic forecasts, major infrastructure projects/key development and population growth and housing are all expecting some form of growth and that demand would continue for the foreseeable future.

### **Aggregate Provision Rates**

34. Following all of these considerations, it is proposed that the Aggregates Provision Rates are kept the same as the LAA for 2023 for Sharp Sand and Gravel, Soft Sand, Crushed Rock and Recycled and Secondary Aggregate. Therefore, the APRs for the LAA for 2024 are:
- **Sharp Sand and Gravel – 0.986mtpa**
  - **Soft Sand – 0.235mtpa**
  - **Crushed Rock – 0.964 mtpa**
  - **Recycled and Secondary Aggregates- 0.926mtpa**

### **Landbank**

35. Using the Aggregates Provision Rate above and the reserves available, the landbanks as at the end of 2024 are:
- **Sharp Sand and Gravel – 6.3 years**
  - **Soft Sand – 13 years**
  - **Crushed Rock – 3.5 years**

### **Mineral Requirements**

#### **Core Strategy**

36. The Core Strategy sets out requirements for Sharp Sand and Gravel, Soft Sand and Crushed Rock for the Plan Period based upon the LAA2014 provision rates.
37. Taking into account the sales since 2014 and the minerals available to be worked over the Plan Period, the remaining required minerals to meet the Core Strategy are set out below:

	<b>Core Strategy Requirements (2014-</b>	<b>Remaining Core Strategy Requirements</b>
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	2031) (Mt – Million tonnes)	identified through LAA
Sharp Sand and Gravel	18.27mt	3.022mt
Soft Sand	3.402mt	0
Crushed Rock	10.512mt	0

**Table 4: Core Strategy Requirements**

### **Landbank**

38. Identifying the 3.022 million tonnes of Sharp Sand and Gravel, will potentially increase the Sharp Sand and Gravel requirement of 7 years, however it will not address the issue of the Crushed Rock landbank being significantly below 10 years required by the NPPF, at 3.5 years. This will need to be addressed, along with any other policy changes required, in a new Minerals and Waste Plan for Oxfordshire. A new Plan will consider mineral requirements for all aggregates over the new Plan period during its preparation.
39. Mineral requirements within the adopted Core Strategy will be replaced with the mineral requirements as set out in the new Minerals and Waste Plan upon adoption. Until that time, the Core Strategy remains in place as the adopted Minerals and Waste Local Plan for Oxfordshire.

### **Conclusion**

40. The purpose of an annual LAA is to review the latest information available, in order to forecast future demand as well as analysing all aggregate supply options and assessing the balance between supply and demand.
41. To ensure that supply continues to meet demand, the Aggregates Provision Rate (APR) included within the LAA are:
  - **Sand and Gravel – 0.986mtpa**
  - **Soft Sand – 0.235mtpa**
  - **Crushed Rock – 0.964mtpa**
  - **Recycled and Secondary Aggregates- 0.926mtpa**
42. Using these APRs and the Oxfordshire reserves at the end of 2024, the landbanks have been calculated as:
  - **Sand and Gravel – 6.3 years**
  - **Soft Sand – 13 years**
  - **Crushed Rock – 3.5 years**
43. To meet the identified Core Strategy mineral requirements, we need to provide the following additional mineral over the Plan Period.
  - **Sand and Gravel - 3.022 million tonnes.**
44. To ensure we meet NPPF and landbanks requirements, the future Minerals and Waste Local Plan will review all mineral requirements over a new Plan

period (at least a 15-year period) and identify the amount of mineral required and the ways in which this will be met.

## **Corporate Policies and Priorities**

45. The LAA contributes to the corporate policy on climate change, the vision for thriving communities and thriving economy. It sets out the requirements for the raw materials required for growth following a full review of various factors. By recording and reviewing the supply and demand for minerals, it ensures we plan for future development well related to its need and based on the principles of sustainable development.

## **Financial Implications**

46. The Minerals and Waste Plan is included within the Economy and Place Directorate and is in part being progressed within the existing base budget for the council's minerals and waste policy function. The LAA forms part of this work-stream and it does not raise any additional financial or staff implications.

Comments checked by:

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## **Legal Implications**

47. Under the Planning and Compulsory Purchase Act 2004 (as amended) and the NPPF, the council is required to prepare, monitor and, as necessary, review a minerals and waste local plan. An annual LAA, as required by the NPPF, is an essential part of the evidence base for a "sound" minerals and waste local plan and is also needed to enable the plan to be monitored. Under the Localism Act 2011, the Council is required to meet the duty to cooperate in the preparation of local plans and related activities in relation to strategic matters.

Comments checked by:

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## **Staff Implications**

48. The Local Aggregate Assessment is included within the work of the Economy and Place Directorate.

## **Equality & Inclusion Implications**

49. None have been specifically identified.

## Sustainability Implications

50. The LAA sets out findings and conclusions on aggregates in Oxfordshire as at the end of 2024, based upon significant facts and figures. This is in accordance with the NPPF.
51. The LAA does not set out where mineral sites will be and the sustainability implications for these. The future Minerals and Waste Local Plan will address the mineral requirements, and this will be subject to an Equality and Climate Change Assessment, as well as a Sustainability Appraisal and Strategic Environmental Assessment or Environmental Outcomes Report. In addition, any future Planning applications will also consider sustainability implications.

## Risk Management

52. Having an up to date and robust LAA in place is necessary for the effective monitoring of the adopted Core Strategy and the preparation of the new Minerals and Waste Local Plan. It will also be an important factor in the determination of planning applications for mineral working where the size of the landbank is a material consideration.

## Consultations

53. The NPPF requires the Council to consult and take into account the advice of the South East England Aggregate Working Party (SEEAWP); the draft Oxfordshire LAA for the year 2024 (Appendix 1) will be considered by SEEAWP in December 2025. Comments received at the December meeting will be fed back to the Cabinet Member for Place, Environment and Climate Action, and the Director for Economy and Place, and any amendments made.
54. There is no requirement for wider consultation on LAAs. This is a technical document that will form part of the evidence base of future Plan preparation and as such will be published alongside the Core Strategy Review and Site Allocations Plan.

**Robin Rogers**  
**Director for Economy and Place**













Annex: Annex 1: Local Aggregate Assessment for 2024

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October 2025

## Appendix 1

### 1.Oxfordshire Summary of Key Data 2024

Summary – Oxfordshire County Council 2024 (million tonnes)									
Quarry Sales	2024 Sales (Mt) & Trend	Average (10-yr) Sales & Trend	Average (3-yr) Sales & Trend	Annual Provision Rate (APR) (Mt)	Reserve (Mt)	Landbank (years)	Allocations (years)	Production Capacity (Mtpa)	Comments
Soft Sand	 0.132	 0.226	 0.188	0.235	 3.021mt	13.0	N/A	0.299	LAA rate remains at 0.235mtpa. Landbank above 7-year requirement
Sharp Sand & Gravel	 0.934	 0.868	 0.928	0.986	 6.177	6.3	N/A	1.652	LAA rate remains at 0.986 Landbank fallen below 7 year requirements
Crushed Rock	 0.981	 0.956	 1.043	0.964	 3.359	3.5	N/A	1.704	LAA rate remains at 0.964. Landbank remains below 10-year requirement
Recycled / Secondary Aggregates	0.447	0.413	0.470	0.926	N/A	N/A	N/A	1.493	These are for 2023. 7% of operators surveyed responded to the 2024

									RSA survey. Average sales is 9 years not 10
<b>Rail Depot Sales (Sand &amp; Gravel)</b>	C	C	C	C	C	C	C	C	Due to commercial confidentiality, we are unable to share these figures
<b>Rail Depot Sales (Crushed Rock)</b>	C	C	C	C	C	C	C	C	Due to confidentiality, we are unable to share these figures

#### General Comments

The reduction in sales Oxfordshire saw in 2023 continued in 2024 for soft sand and crushed rock, but there was a small increase for sharp sand and gravel.

The 2024 LAA Aggregate Provision Rate for Soft Sand remains 0.235, the 10 year average, following a review of demand, consumption, imports and exports and other local factors such as economic growth, population and housing.

The 2024 LAA Aggregate Provision Rate for Sharp Sand and Gravel remains at 0.986mtpa following a review of demand, consumption, imports and exports and other local factors such as economic growth, population and housing.

The 2024 LAA Aggregate Provision Rate for Crushed Rock remains at 0.964 following a review of demand, consumption, imports and exports and other local factors such as economic growth, population and housing.

Using the Crushed Rock LAA Rate, we are still below the required 10-year landbank for the seventh consecutive year. Using the Sharp Sand & Gravel LAA Rate, we are below the required 7-year landbank. Issues with the Landbanks will be considered within the preparation of the new Minerals and Waste Local Plan.

The Recycled and Secondary Aggregate figures are for 2023 and have been calculated using the Waste Data Interrogator for 2023 as 7% of operators responded to 2024 survey.