Dorset Council

with BCP Council

14th Local Aggregate Assessment 2015 - 2024

August 2025

Contents

Table 1 – 2023/2024 Comparison 7

Table 2 – Landbanks and Reserves 8

1. Summary ***8***

Recycled aggregate **9**

Marine dredged sand and gravel **9**

Crushed rock – land-won **9**

Crushed rock – rail imported **9**

Crushed rock – road imported **10**

Land-won sand and gravel **10**

2. Introduction ***11***

3. The Resource ***13***

Sand and Gravel **14**

Quarries in Dorset **15**

Figure 1 – The Sand and Gravel Resource, with aggregate quarries operational in 2024 16

Figure 2 – The Sand and Gravel Resource, with permitted aggregate quarries in 2024 17

Table 3 – Permitted Sand and Gravel Quarries in 2024 18

Crushed rock **20**

4. Aggregate Sales – crushed rock and sand and gravel *21*
Table 4 – Aggregate Sales 2015 – 2024 (million tonnes) 21
Figure 3 : Aggregate Sales/Landings 2015 – 2024 22
5. Crushed Rock *23*
Landbank **23**
Importation of Crushed Granite **25**
Rail Imports **25**
Road imports **25**
6. Sand and Gravel *26*
Landbank **26**
Imports **27**
Monitoring Separate Poole Formation and River Terrace Aggregate Landbanks **27**
Trending Changes for Sales, Reserves and Landbanks. **28**
Table 5 - Sand and Gravel and Crushed Rock - Sales, Reserves and Landbank Figures 29
7. Allocated Sites *31*
Table 6 – Mineral Sites Plan 2019 - Status of Aggregates Site Allocations 31
8. Supply of aggregate and productive capacity of current sites *33*
Table 7 – Indicative Productive Capacity 33

9. Aggregate Supply from other Mineral Planning Authorities *35*
Table 8 – Sand and Gravel Consumed in Dorset in 2019 - Supply Sources 35
Table 9 – Crushed Rock Consumed in Dorset in 2019 - Supply Sources 36
10. Other Sources of Aggregate Supply for Dorset *37*
11. Marine Dredged Aggregate *38*
Poole Wharf 38
Table 10 – Summary of Marine Dredged Landings (mt) 38
Figure 4 - Marine Dredged Aggregate – South Coast Region 40
Figure 5 – Reserves and Resources 41
Constraints and Future Supply 42
12. Recycled Aggregates *42*
Table 11 – Summary of Recycled Aggregate Sales (mt) 43
Figure 6 – Fixed Aggregate Recycling Facilities 2024 44
Table 12 - Recycled Aggregate Sites and Operators 45
Capacity, Constraints and Future Supply 46
13. Uses of Dorset's Aggregate Resource *47*
14. Exports from Dorset *48*
Sand and Gravel 49
Table 13 – Destination of Land-Won sand and gravel aggregate sold in Dorset in 2014 (AM 2014) 49
Table 14 – Destination of Land-Won sand and gravel aggregate sold in Dorset in 2019 (AM 2019) 50
Destination of Land-Won sand and gravel aggregate sold in Dorset in 2024 50
Crushed rock 51

Table 15 – Destination of Crushed Rock aggregate sales from Dorset in 2014 (AM 2014) 51
Table 16 – Destination of Crushed Rock aggregate sales from Dorset in 2019 (AM 2019) 51
Table 17 – Destination of Crushed Rock aggregate sales from Dorset in 2024 52
Marine Dredged 52
Table 18 – Destination of Marine Dredged aggregate sales from Dorset in 2014 (AM 2014) 52
Table 19 – Destination of Marine Dredged aggregate sales from Dorset in 2019 (AM 2019) 53
Table 20 – Destination of Marine Dredged aggregate landings from Dorset in 2024 53

15. Consumption within Dorset 54

16. Future Demand 55

Table 21 – Land-won sand and gravel sales – Dorset and South-West compared 55
Figure 7 - Sand and Gravel Sales Totals 2005 – 2023 for South West England (Source: MPA) 56
Built development. 57
Table 22 - Proposed Housing Development in current adopted Local Plans / Development Plan Documents in Bournemouth, Christchurch, Poole and Dorset 57
Table 23 - Net Annual Completions 60

17. Projected development beyond current Plan periods 61

18. Other Potential Future Need for Aggregates 62

19. Maintaining Supply 62

20. Capacity and Constraints 63

21. Final Comment 64

Appendix 65

Table 24 - Land Won Sand and Gravel Quarries – operational in 2024 (see Figure 2 for locations) 65
Table 25 - Land Won Sand and Gravel Quarries – permitted but inactive in 2024 66
Table 26 - Crushed Rock Quarries – operational in 2024 66
Table 27 - Aggregate Wharf 67
Table 28 - Aggregate Rail Depots (both currently inactive) 67
Table 29 - Fixed Recycled Aggregate Facilities – operational in 2024 68

Table 1 – 2023/2024 Comparison

Type of Aggregate	2023			2024			
	Sales (tonnes) --- (LANDINGS for marine dredged)	**10 year average (mt)**	**3 year average (mt)**	**Sales (tonnes) --- (LANDINGS for marine dredged)**	**10 year average (mt)**	**3 year average (mt)**	**Compared to previous year**
Recycled	**491,901** * (28.1%)	0.41	0.47	**444,170** * (26.3%)	0.43	0.46	**Decrease over previous year**
Marine Dredged - Landings	**26,413** (1.5%)	0.07	0.06	**40,722** (2.4%)	0.07	0.04	**Increase over previous year**
Local land-won Crushed Rock	**171,162** * (9.8%)	0.21	0.18	**179,842** * (10.6%)	0.20	0.16	**Increase over previous year**
Local land-won Sand and Gravel (Aggregate use)	**952,811** [1] (54.4%)	1.31	1.17	**1,006,751** (59.5%)	1.24	1.10	**Small decrease over previous year**
Local land-won Sand and Gravel (Non-Aggregate use)	**108,247** [1] (6.2%)			**19,737** (1.2%)			
Total Aggregate	**1,750,534** (100%)	2.0 mt	1.85 mt	**1,691,222** (100%)	1.94	1.76	**Small decrease over previous year**

*** Includes estimate for site/sites due to non-returns by some operators.**

[1] Figure has been amended since previous Local Aggregates Assessment

Table 2 – Landbanks and Reserves

	2023		2024		
Type of Aggregate	**Landbank (Years)**	**Reserves at end of 2023 tonnes)**	**Landbank (Years)**	**Reserves at end of 2024 (tonnes)**	**Compared to previous year**
Crushed Rock – Local Land-won	c.65	13,572,557	c.64	12,859,415	**Decrease over previous year**
Sand and Gravel – Local Land-won	8.9	11,593,076	7.7	9,526,240	**Decrease over previous year**

1. Summary

E.1. Mineral Planning Authorities are required[2] by the National Planning Policy Framework 2024 (NPPF) to ensure a steady and adequate supply of aggregates and to prepare a Local Aggregate Assessment (LAA) annually. National Minerals Planning Practice Guidance (NPPG) was published by the then Department of Communities and Local Government (DCLG) in 2014, followed by Practice Guidance on the Production and Use of LAAs from the Planning Officers Society and Minerals Products Association in 2017, both setting out further details on how LAAs should be prepared. This LAA, covering the period 2015 to 2024, has been produced with due regard to the NPPF and these guidance documents.

E.2. In Dorset (including Bournemouth, Christchurch and Poole) total sales of all types of aggregate in 2024 were 1,691,222 tonnes, a small decrease of some 59,312 tonnes from the 2023 figure of 1,750,534 tonnes. Figures for 2023 and 2024 are set out in **Table 1** above.

[2] NPPF December 2024, paragraph 226 (a) (National Planning Policy Framework)

Recycled aggregate

E.3. In 2024 recorded sales of recycled aggregate decreased to around 444,170 tonnes from around 491,901 tonnes the previous year. Sales/production are likely to be higher than is indicated as the surveying only records output from permitted sites. Permitted capacity is in excess of this figure, and it is assumed that output could increase, provided increased waste arisings and markets were both available.

Marine dredged sand and gravel

E.4. Crown Estate figures show that in 2024, Poole Wharf (CEMEX) landed 40,722 tonnes of marine dredged aggregate, an increase from the previous year. Indications are that it could import more if demand existed. Further marine aggregate reserves are available.

Crushed rock – land-won

E.5. In 2024, sales of crushed rock were **ESTIMATED** to be 179,842 tonnes, an increase from the previous year's production. This figure again includes an estimated value for one site, as no return was received from the operator of that site. The ten year average of sales was approximately 200,000 tonnes per annum. The landbank has decreased to c. 12,800,000 tonnes and is estimated to be approximately 64 years. It is considered that sales from crushed rock production sites could increase if demand existed, subject to other constraints such as access between quarries and markets. The Mineral Planning Authority (MPA) considers it appropriate to continue to use the 10 year average of sales to determine the landbank.

Crushed rock – rail imported

E.6. In 2018, Hanson ceased using the Hamworthy rail depot for importing crushed rock from the Mendips. A local minerals operator has taken over the lease but to date no crushed rock has been imported by rail as maintenance/repairs to the line are awaited. Historically, the maximum amount imported in any one year since 2003 was 160,000 tonnes in 2004. The 10 year average, measured from 2003 to 2012 (the most recent period for which consistent data exists), was some 90,000 tonnes per annum. Although indications are that there is capacity to import at least 90,000 tonnes or more per annum, the issue of whether the necessary repairs/upgrading will be carried out must be addressed. Until this is done it cannot be assumed that future supply will be available from rail imports.

Crushed rock – road imported

E.7. The 2014 national Aggregate Minerals Survey (AMS) indicated that approximately 260,000 tonnes of crushed rock was imported by road in 2014, primarily from Somerset. The 2019 AMS national survey indicates a decrease in the level of imports, with between 115,000 and 144,000 tonnes of crushed rock being imported by road from Somerset. The results of the 2023 AMS national survey are unfortunately not yet available for further comparison.

E.8. There are no planning restrictions on the amount that can enter Dorset this way and Somerset's landbank is adequate to maintain sales so subject to other constraints (e.g. traffic volumes) it is expected that supply will be maintained and will increase to meet demand if required.

Land-won sand and gravel

E.9. Land-won sand and gravel is the highest proportion of the 'mix' of supply of aggregate for Dorset Council and BCP Council. Sales of sand and gravel for aggregate use increased between 2023 and 2024, but there was a decrease in sand and gravel sales for non-aggregate use, resulting in an overall small decrease in sales between 2023 and 2024 as shown in **Table 1**, from 1,061,058 tonnes to 1,026,488 tonnes. At 1.03 mt, sales in 2024 were below the ten year average figure of 1.24 mt and below the three year average figure of 1.10 mt. Within the overall sand and gravel sales figure, while River Terrace sales continued to decline, Poole Formation sales showed an increase from 2023. It is expected that the rate of housing completions, one measure of future demand, is likely to increase in the future although no sharp, short-term increases are expected. There are no other projects likely to lead to sharp, sudden changes in demand.

E.10. The overall sand and gravel landbank has decreased in size and number of years, but remains above 7 years at approximately 7.68 years. When considering the elements of the landbank separately, the Poole Formation landbank is now under 7 years at 6.7 years while the River Terrace landbank also remains above 7 years at 9.4 years (both figures using the ten year sales average from 2015 to 2024. No new permissions were granted in 2024 but new permissions will be required in coming years to maintain the sand and gravel landbank.

E.11. Future sales will be met from existing permitted reserves together with the sites allocated through the Bournemouth, Christchurch, Poole and Dorset Mineral Sites Plan 2019. Three of these sites are still under consideration for permission. The Mineral Planning Authority is inclined to continue to use the ten-year average for the coming year to determine the landbank and to estimate likely future demand and reserve depletion, to be reviewed through future Local Aggregates Assessments.

E.12. All sources of aggregate (apart from rail imported crushed rock) demonstrate potential for some increase in supply, should demand increase. No sharp increases in demand are expected in the next year. In the longer term, there are adequate landbanks for sand and gravel and crushed rock, provided new permissions are granted. The Mineral Sites Plan 2019 allocates new sites for sand and gravel to maintain production and sales, and includes a policy for development of unallocated sites under certain conditions. The MPA has reasonable confidence that supplies of sand and gravel will continue to flow at the level of provision as set out in Policy AS1 of the 2014 Bournemouth, Dorset and Poole Minerals Strategy. Supply will continue to be monitored.

E.13. It is therefore considered appropriate to continue to use the 10 year average (2015-2024) figure for sales of sand and gravel of 1.24 mtpa as set out in this Local Aggregate Assessment, to establish the size of the landbank and level of provision for sand and gravel. This figure is in excess of sales for the past 7 years.

E.14. Similarly, it is considered appropriate to continue to use the 10 year average (2015-2024) figure for sales of crushed rock of 0.20 mtpa to establish the size of the landbank and level of provision for crushed rock. This figure is in the vicinity of sales over the past 9 years.

2. Introduction

2.1. National Minerals Planning Practice Guidance on preparation of Local Aggregates Assessments was published by the then Department of Communities and Local Government (DCLG) in 2014, followed by *Practice Guidance on the Production and Use of LAAs* from the Planning Officers Society and Minerals Products Association in 2017. The advice contained in these sources has been taken into consideration in preparation of the current LAA.

2.2. LAAs provide an annually-updated evidence base, contributing to monitoring of aggregate provision and informing production/review of minerals plans. The National Planning Practice Guidance (NPPG) refers to LAAs containing three elements:

- a forecast of the demand for aggregates based on both the rolling average of 10-years sales data and other relevant local information (information on sales of aggregates over the last three years should also be taken into consideration, to seek to identify more recent trends that might indicate whether an increased supply was appropriate);
- an analysis of all aggregate supply options, as indicated by landbanks, mineral plan allocations and capacity data e.g. marine licenses for marine aggregate extraction, recycled aggregates and the potential throughputs from wharves/rail depots; and
- an assessment of the balance between demand and supply, and the economic and environmental opportunities and constraints that might influence the situation. It should conclude if there is a shortage or a surplus of supply and, if the former, how this is being addressed.

2.3. Paragraph 219 of the NPPF (2023) requires Mineral Planning Authorities (MPAs) to '*plan for a steady and adequate supply of aggregates by:*

a. preparing an annual Local Aggregate Assessment, either individually or jointly, to forecast future demand, based on a rolling average of 10 years' sales data and other relevant local information, and an assessment of all supply options (including marine dredged, secondary and recycled sources);

2.4. 'Dorset' LAAs have consistently been prepared on a joint basis, from 2011 to the present. Originally Dorset County Council prepared them on behalf of the Borough of Poole and Bournemouth Borough Council, under the terms of a Service level Agreement (SLA). On 1 April 2019, two new unitary authorities – Dorset Council and Bournemouth, Christchurch and Poole Council – replaced the former Dorset County Council, Bournemouth Borough Council, Borough of Poole and the Dorset district and borough councils. After that joint LAAs continued to be prepared by Dorset Council on behalf of Bournemouth, Christchurch and Poole (BCP) Council, covering the administrative areas of Dorset Council and BCP Council for each calendar year.

2.5. In any reference to the AMS national aggregate surveys (and particularly in comparing data from the 2014 AMS, and later surveys), note that in April 2019 Christchurch Borough became part of BCP Council, and was no longer included with the newly created Dorset Council.

2.6. Although BCP Council no longer have a Service Level Agreement with Dorset Council covering minerals and waste policy related work, the current Local Aggregates Assessment will, by agreement, cover both Dorset Council and BCP Council. As with previous LAAs, the LAA reviews provision of various types of aggregates from various sources in the Dorset and Bournemouth, Christchurch and Poole council areas. It considers likely future demand for and feasibility of current and future supply of aggregate, based on data collected up to and including 2024.

2.7. Local minerals policy is set by the Bournemouth, Dorset and Poole Minerals Strategy, (adopted by Dorset County Council, Bournemouth Borough Council and Borough of Poole in May 2014, and setting out the strategy for the supply of minerals, including aggregates, up to 2028) and the Bournemouth, Christchurch, Poole and Dorset Mineral Sites Plan (MSP) adopted 31 December 2019, intended to complement and deliver the Minerals Strategy 2014.

2.8. An Aggregates Minerals Survey (AMS) 2023 national survey, covering England, Wales and Scotland was undertaken last year, but the results have not yet been published.

3. The Resource

3.1. Aggregates are hard granular (mineral) materials, essential requirements for a range of uses in society. They are raw materials for the construction industry, required for built development, manufacturing and the maintenance of infrastructure such as roads and sea defences. They also have other uses, including for recreational facilities and in horticulture/landscaping. They are required to support economic development. They may be primary (excavated or dredged specifically for use as aggregates), secondary (produced as a by-product of some other process or excavation) or recycled from appropriate waste material.

3.2. In Dorset, land-won or primary aggregates are either quarried from limestone deposits and crushed to various sizes (crushed rock) or quarried from sand/gravel formations, both bedrock or superficial, and processed and sold. Marine aggregates are dredged from the sea bed, and landed at an aggregate wharf in Poole. Sand is produced alongside ball clay and in Dorset it is classified as primary aggregate, not secondary,

as it is generally located above the ball clay. No secondary aggregate is produced in Dorset. Recycled aggregates are derived from processed construction, demolition and excavation waste.

3.3. Dorset's varied geology makes it a mineral rich county with a range of resources. Mineral extraction is tightly constrained by landscape, nature conservation and other interests. Much of the sand and gravel bearing areas coincide with important landscapes and designated ecological habitats, but much also lies in areas where there are opportunities to avoid constrained land or mitigate against the adverse impact of development by re-creating habitats such as lowland heath. Dorset contains deposits of both River Terrace sand and gravel and underlying Poole Formation sands, and is also a (relatively low) producer of crushed Jurassic limestone, sourced from Portland and Purbeck. Dorset's sand and gravel resources are largely concentrated in the south east of the county, as shown in **Figures 1 & 2** below.

3.4. Dorset has one aggregates wharf at Poole, handling marine dredged sand and gravel; one railhead at Wool which has been used in the past for exporting sand to London and one aggregates rail depot at Hamworthy (Poole), bringing crushed limestone from the Mendips. Neither the railhead or the rail depot are currently active.

Sand and Gravel

3.5. Sand and gravel in Dorset is produced primarily from Poole Formation sand (geologically a bedrock deposit) and River Terrace or plateau sand and gravel (geologically a superficial deposit). Poole Formation sand is the most important source of sand in the plan area, outcropping in the south east of the county and forming hills and ridges in a broad zone stretching from Dorchester to Wareham and around the fringes of Poole and Verwood. The sands comprise a series of upward fining sequences, becoming finer grained with increasing silt content towards the south east. The variations in particle size enable a wide range of products to be produced. They form the most important source of sand in Dorset and give rise to the ecologically important heathlands.

3.6. Between these areas of higher land run the river valleys of the Frome, Piddle, Stour and Avon. Extensive spreads of river terrace sand and gravel are deposited along the flanks of these valleys. In the north-west, the valley of the River Axe contains exceptionally deep gravel deposits, up to 20m thick. Large flint pebbles and cobbles are found within some river terrace deposits, particularly east of Dorchester. Plateau gravels are found capping many of the hills and ridges. Only isolated pockets now remain available, the majority already being worked out, built upon

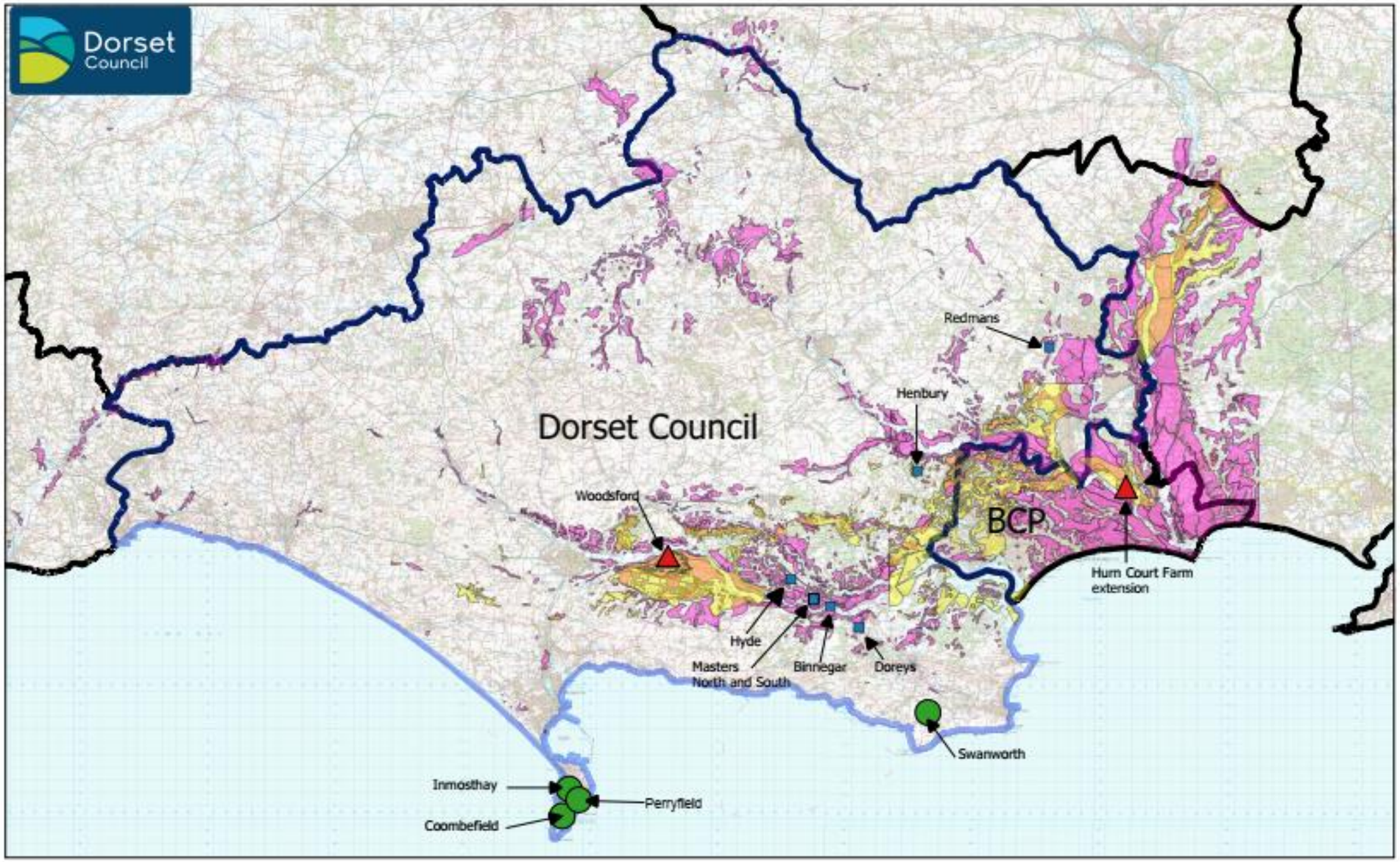
or of ecological importance. These deposits are now of only limited economic importance. The ball clay resource is also located within the Poole Formation, and sand (and gravel) sometimes overlies the clay. Permissions can be granted for the extraction of the sand and gravel, in advance of, alongside or after, the ball clay extraction. In Dorset, this sand and gravel is treated as a primary aggregate.

Quarries in Dorset

3.7. **Figure 1** below shows the spatial distribution of Poole Formation and River Terrace sand and gravel in Dorset and BCP Council, with operational sand and gravel and crushed rock sites, in 2024.

3.8. **Figure 2** shows permitted sites, though not all were operational in 2024. The sand and gravel, and limestone for crushing, is predominantly located in the south east of the area, as are the sites where the mineral is extracted and processed. They coincide with the location of most of the urban development in the county, which sterilises much of the deposit.

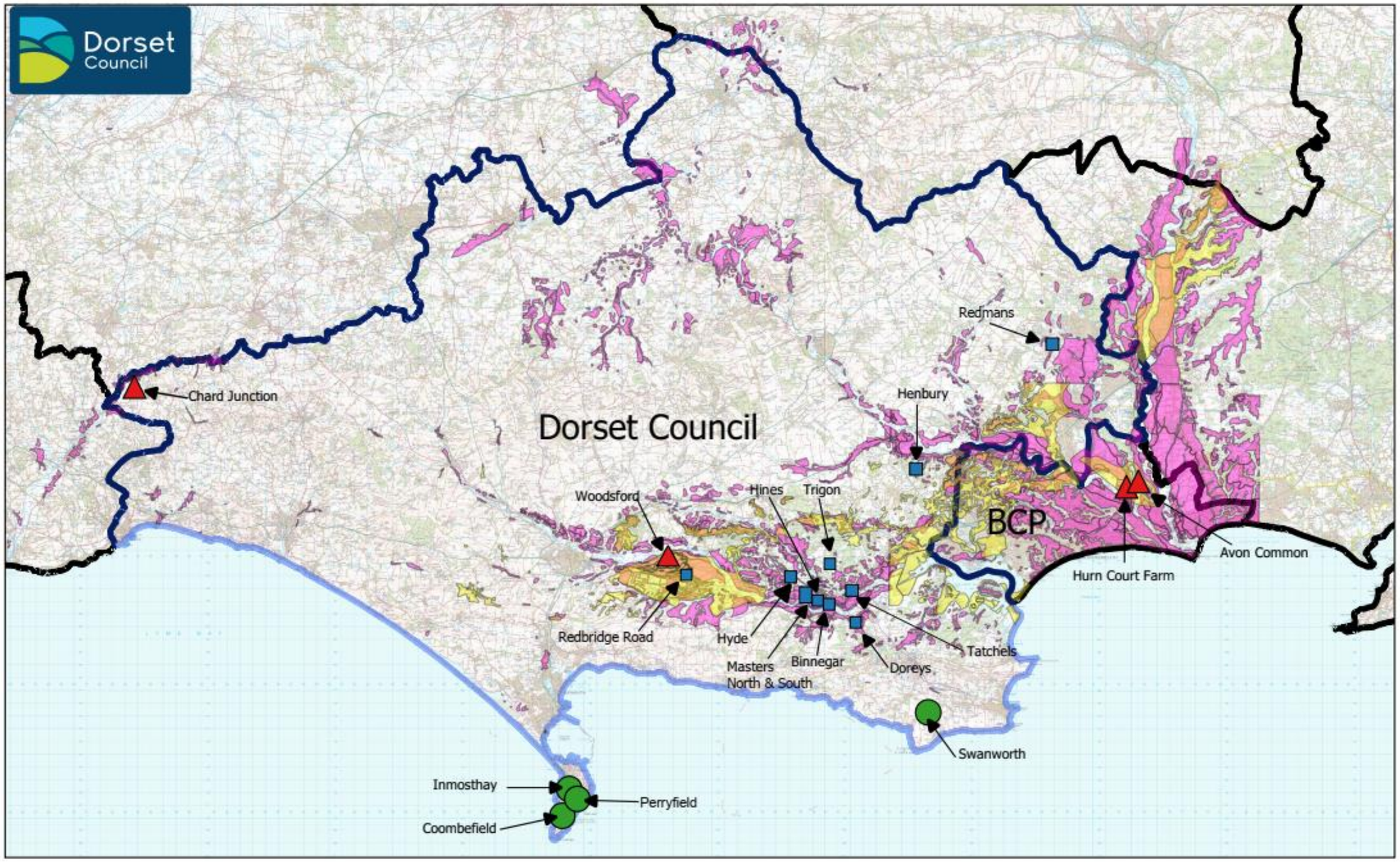
Figure 1 – The Sand and Gravel Resource, with aggregate quarries operational in 2024



Operational Aggregate Sites in Dorset 2024

- Operational Sand and Gravel Extraction Sites
- Operational Sand Extraction Sites
- Operational Crushed Rock Sites
- Poole Formation Deposits
- River Terrace Deposits

Figure 2 – The Sand and Gravel Resource, with permitted aggregate quarries in 2024



2.1. **Table 3** below lists the sand and gravel quarries in Dorset, showing the end-dates for the permissions.

Table 3 – Permitted Sand and Gravel Quarries in 2024

Name of Quarry	Operator	(Predominant) Aggregate Type produced	End of Permission
Binnegar Quarry	Raymond Brown	Poole Formation sand	31.12.2030
Dorey's Pit	Holme Estate	Poole Formation sand	30.09.2026
Hines	Holme Sand and Ballast	Poole Formation sand	30.05.2021 (application for extension of time to 30.05.2023 is currently being determined)
Hyde	(Heidelberg) Hanson	Poole Formation sand	22.02.2042
Masters North and South	Holme Sand & Ballast	Poole Formation sand	When mineral deposit is extracted or by 31.12.2032, whichever is sooner.
Tatchell's Quarry,	Aggregate Industries	Poole Formation sand	21.02.2042
Trigon Hill	Landowner	Poole Formation sand from ball clay quarry	15 years from start of further working – ball clay only[3]
Henbury Pit	M B Wilkes	Poole Formation sand	21.02.2042

[3] The working area at Trigon Hill has been extended, along with end-date for working and is now 15 years from start of further working – however, this applies to ball clay working only and aggregate extraction has ceased, although some aggregate is still sold from stockpiles.

Name of Quarry	Operator	(Predominant) Aggregate Type produced	End of Permission
Redman's Quarry	Redman's Sand Ltd	Bagshot sands	31.12.2030
Redbridge Road Quarry	G Crook & Sons	River Terrace sand and gravel	Mineral extraction to cease by 31.12.2021.
Chard Junction Quarry	Aggregate Industries	River Terrace sand and gravel	31.03.2023 – now in restoration
Woodsford Quarry	Hills Quarry Products	River Terrace sand and gravel	2028
Avon Common[4] (BCP Council)	Tarmac	River Terrace sand and gravel	11 years from commencement of sales of sand and gravel – extraction has not begun although permission has been implemented
Hurn Court Farm (BCP Council)	New Milton Sand & Ballast	River Terrace sand and gravel	26.09.2019 - extension to 2031 granted for use of plant and final restoration
Hurn Court Farm Extension (BCP Council)	New Milton Sand & Ballast	River Terrace sand and gravel	2031

[4] Permission has been implemented, but no further development to date

Crushed rock

3.9. Crushed rock in Dorset is supplied from crushing of stone in the Portland quarries, and from Swanworth Quarry in Purbeck. On Portland, a large composite planning permission was granted in 1951, with an end date of 2042. It covers approximately two thirds of the plateau forming the top of the island and was intended primarily to provide Portland Stone as dimension stone, but crushed rock is also produced from the crushing of waste stone, offcuts and the underlying cherty series. Mining as a means of extracting dimension stone is becoming more widely used on Portland, and the waste stone is used in the restoration of worked out mines, potentially reducing the availability of stone that can be crushed.

3.10. Threats to the continued operation of crushed rock sales also include alternative restoration options for the quarries on Portland, where various uses have been proposed (e.g. leisure, tourism or housing proposals). These have the potential to reduce further the availability of crushed rock. In a number of cases, as part of other planning applications, Portland Stone operators have relinquished the rights to crush stone, or blast and crush cherty, further reducing the potential availability of crushed rock in the future. There is therefore no certainty that all the approximately 12 mt of crushed rock reserves referred to above (e.g. **Table 2**) are and will remain available for extraction and sales. Most recently crushed rock has been produced in three quarries on Portland, although not all at the same time.

3.11. The Jurassic Limestone from Dorset is generally regarded as relatively weak, a softer rock than Carboniferous Limestone and is normally unsuitable as a concreting aggregate. It is often used as fill or as Type 1 aggregate for construction purposes. Stone to be crushed for aggregate sales is either waste stone resulting from production of dimension stone, certain other types of stone not suitable for dimension stone or stone from the cherty series, which forms the deepest quarried bed on Portland and is only suitable for crushing. Working of the cherty beds results in a deeper void space and delays quarry restoration.

3.12. The only crushed rock aggregate quarry outside Portland is Swanworth Quarry, near Worth Matravers in Purbeck. It produces crushed rock from the Portland Beds. Swanworth Quarry is situated within the AONB and the Heritage Coast. An extension is allocated in the Mineral Sites Plan 2019 and was permitted in 2022.

3.13. Crushed rock is also imported from elsewhere, principally Somerset, by road. This is the much harder Carboniferous limestone.

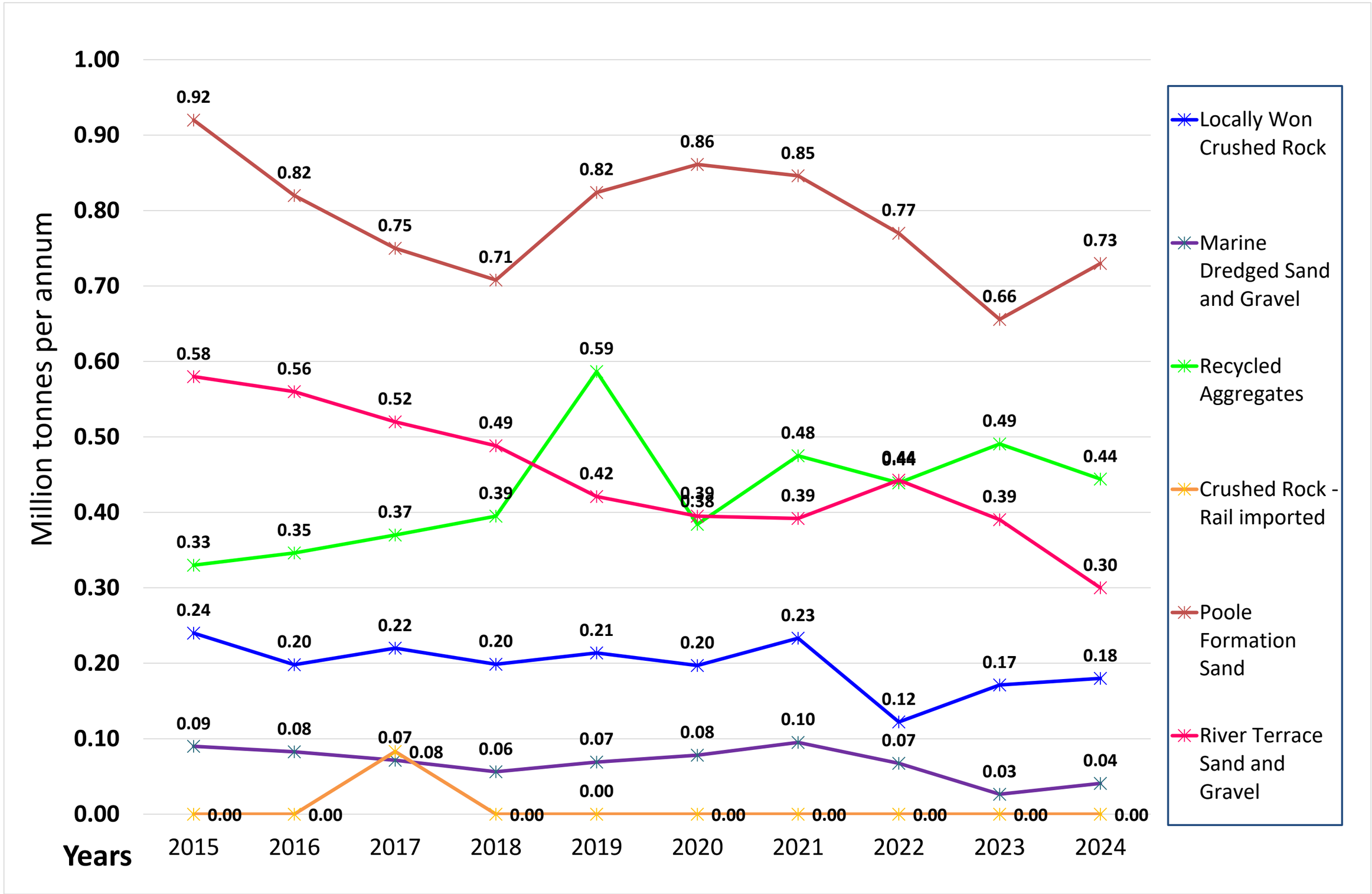
4. Aggregate Sales – crushed rock and sand and gravel

4.1. The National Planning Policy Framework (NPPF) requires an LAA to be based on a rolling average of sales over ten years – along with other relevant local information and an assessment of all supply options. The three year average should also be taken into consideration. **Table 4** and **Figure 3** below set out the ten-year average and three-year average sales figures for all the types of aggregates produced in Dorset, along with historic sales figures.

Table 4 – Aggregate Sales 2015 – 2024 (million tonnes)

Aggregate type	2015	2016	2017	2018	2019	2020	2021	2022	2023	2024	10 YEAR AVERAGE	3 YEAR AVERAGE
River Terrace (sand and gravel)	*0.58*	*0.56*	*0.52*	*0.49*	*0.42*	*0.39*	*0.39*	*0.44*	*0.39*	*0.30*	***0.45***	***0.38***
Poole Formation (sand)	*0.92*	*0.82*	*0.75*	*0.71*	*0.77*	*0.86*	*0.85*	*0.77*	*0.66*	*0.73*	***0.79***	***0.72***
Total Land-Won Sand and Gravel *(River Terrace and Poole Formation)*	**1.50**	**1.39**	**1.27**	**1.19**	**1.19**	**1.25**	**1.24**	**1.21**	**1.05**	**1.03**	**1.24**	**1.10**
Land-Won Crushed Rock	**0.24**	**0.20**	**0.22**	**0.20**	**0.21**	**0.20**	**0.23**	**0.12**	**0.17**	**0.18**	**0.20**	**0.16**
Crushed Rock - Rail Imported	**0.00**	**0.00**	**0.08**	**0.00**	**0.00**	**0.00**	**0.00**	**0.00**	**0.00**	**0.00**	**0.01**	**0.00**
Sand and Gravel - Marine Dredged	**0.09**	**0.08**	**0.07**	**0.06**	**0.07**	**0.08**	**0.10**	**0.07**	**0.03**	**0.04**	**0.07**	**0.04**
Recycled aggregates	**0.33**	**0.35**	**0.37**	**0.39**	**0.60**	**0.39**	**0.48**	**0.44**	**0.49**	**0.44**	**0.43**	**0.46**
Total production - million tonnes per annum	**2.16**	**2.02**	**2.01**	**1.85**	**2.07**	**1.92**	**2.04**	**1.84**	**1.73**	**1.69**	**1.94**	**1.76**

Figure 3 : Aggregate Sales/Landings 2015 – 2024



4.2. **Table 4** and **Figure 3** indicate:

- Sales of local land-won crushed rock declined sharply between 2021 and 2022, but have increased since 2022
- Poole Formation sales increased sharply between 2023 and 2024, while River Terrace sales continued to decrease
- **Table 3** shows a 10 year average of 1.24 mt per annum (mtpa) for land won sand and gravel (Poole Formation and River Terrace combined) and 0.20 mtpa for local land-won crushed rock
- In addition to the 10 year average, paragraph 064 of Planning Policy Guidance advises Mineral Planning Authorities to '*look at average sales over the last three years in particular to identify the general trend of demand as part of the consideration of whether it might be appropriate to increase supply*.' For the three years up to and including 2024, average sales of sand and gravel (Poole Formation and River Terrace combined) were 1.10 mtpa
- The 3 year average for crushed rock is 0.16 mtpa, less than the 10 year average

5. Crushed Rock

Landbank

5.1. The NPPF requires Mineral Planning Authorities to maintain a landbank of at least 10 years for crushed rock. The estimated reserve for crushed rock, comprising that on Portland and the recent permission at Swanworth Quarry in Purbeck, is approximately 12,859,415 tonnes.

5.2. The landbank is located almost entirely on Portland, within a composite planning permission granted in 1951 covering around two thirds of the top of the island. There are no specific crushed rock quarries on Portland – they are all dimension stone quarries, and the main business of the two stone companies operating on Portland is dimension stone. Material such as unwanted offcuts and quarry/mining waste is crushed and sold as aggregate or armourstone. In addition, a layer of cherty stone underlying the dimension stone can potentially be extracted and crushed and sold as aggregate from some sites. There is no specific, permitted amount of crushed rock reserve that can be clearly identified and quantified. The landbank for crushed rock can only be an estimate as the amount available for crushing varies depending on other circumstances. The

figure of c. 12.8 mt is derived from estimating how much remaining stone that is not suitable for dimension stone could be available for crushing – along with the Swanworth reserve, which is predominantly for crushed rock.

5.3. The 2021, 2022, 2023 and 2024 estimates of stone with potential to be crushed as set out in **Table 5** attempt to take a realistic view of what stone might be available for crushing, taking into account other development on Portland that has reduced the availability of stone that might have been crushed. This includes where underground mines have been permitted within the 1951 permission and where buffer zones restricting minerals development have been implemented around new housing developments within or close to the 1951 permission. It also takes into account other areas within the 1951 permission that have been relinquished or revoked.

5.4. The Minerals Strategy 2014 advocates underground mining on Portland to access parts of the dimension stone reserve to minimise impacts. Where mining permissions have been granted, the availability of stone that may ultimately be crushed is reduced. In some cases mineral-working buffer areas have been implemented around new housing developments within or close to the 1951 permission, further reducing the reserve. Although these factors have been taken into account in assessing the current estimated reserve wherever possible, the reserve could be further reduced as more situations such as these occur.

5.5. The Mineral Sites Plan 2019 does not allocate any new open-cast quarries on Portland, nor does it propose any new mines. The only other crushed rock quarry in Dorset is Swanworth Quarry in Purbeck. This has historically been the largest single producer of crushed rock in Dorset. The Mineral Sites Plan 2019 allocates an extension to Swanworth Quarry, which was permitted in 2022 and the s.106 agreement was signed in 2023.

5.6. The 10 year average of sales (2015 to 2024), as set out in **Table 4**, is **0.20 mtpa**. If this figure is applied to the estimated reserve (see **Table 5**), this gives the following result:

Crushed rock landbank: 12.86 mt / 0.20 mtpa = c. 64 years

5.7. The crushed rock landbank at the end of 2024 is therefore calculated as **c.64** years supply. This is well in excess of the required 10 years, and also far in excess of the requirement over the timescale of the adopted Bournemouth, Dorset and Poole Minerals Strategy (2014-2028) and the Mineral Sites Plan 2019 (2019-2034).

Importation of Crushed Granite

5.8. Crushed granite has in the past been imported into Poole Wharf from Northern Ireland for exclusive use in an asphalt producing plant in Poole. However, the Mineral Planning Authority is not aware of any imports since 2012.

Rail Imports

5.9. Hamworthy rail depot in Poole, prior to its closure in 2012, received crushed limestone from Whatley Quarry in Somerset for local distribution and use. An average of approximately 90,000 tpa was imported up to the end of 2012, while the site was still active. The facility was temporarily reopened in 2017, importing around 83,000 tonnes.

5.10. Hanson ceased using the depot in 2018 and a local quarry operator has taken over the lease. As noted earlier, a decision on repairs/upgrading of the line is awaited. Subject to the outcome of this matter, rail imports of crushed rock could cease. There were no rail imports of crushed rock from the Mendips or elsewhere in 2024.

5.11. Opportunities for the establishment of additional rail depots are limited. In the north, where the Salisbury-Exeter line passes in and out of Dorset, the Mendip quarries are relatively close, but road links are more direct and markets more distant. The north-south single line from Yeovil to Dorchester passes through a rural area with limited opportunity and need for such a facility. On this line, and the main line from London to Weymouth, new depots or the expansion of existing depots are encouraged through Policy AS4 of the Minerals Strategy 2014. However, no new rail depots have been proposed through the Mineral Sites Plan and there have been no applications under Policy AS4

5.12. Rail sidings at Wool have in the past been used for the export of sand from Warmwell Quarry to London, and were last used in 2015.

Road imports

5.13. It is difficult to put a firm figure on levels of input from road imported crushed rock as the amount brought in will depend largely on market demand/supply. The 2014 AM survey indicated that approximately 260,000 tonnes of crushed rock were imported by road from Somerset. The 2019 AM survey indicates a decrease in the level of imports, with between 115,000 and 144,000 tonnes of crushed rock being imported from

Somerset. Since the Hamworthy Depot was not in operation, this indicates that all was imported by road. The data collected in the national AMS 2023 is not yet available, so the current position is unknown.

5.14. There are no planning restrictions on the amount that can enter Dorset this way. The Somerset Local Aggregate Assessment Eighth Edition, data to 2022, notes that Somerset had estimated permitted reserves for Crushed Rock (excluding HPSVSA) at the end of 2022 of approximately 326.22 million tonnes, giving an estimated landbank of approximately 23.7 years, above the required 15 years. Given that it is likely that Somerset will maintain its production of crushed rock and provided the demand exists in Dorset, it is expected that road imports will continue at levels dictated by the market.

6. Sand and Gravel

Landbank

6.1. The NPPF requires Mineral Planning Authorities to maintain a landbank of at least 7 years for sand and gravel.

6.2. The reserve for sand and gravel at the end of 2024 was 9,526,240 tonnes. The 10 year average of sales (2015 to 2024), set out in **Table 4**, is **1.24 mtpa**. If this figure is applied to the reserve (see **Table 2**), this indicates the landbank remains at over 7 years :

Sand and gravel landbank: 9.53 mt / 1.24 mtpa = 7.68 years

6.3. As noted earlier, land won sand and gravel in Dorset comprises primarily Poole Formation sand and River Terrace sand and gravel. The landbank for sand and gravel (both Poole Formation and River Terrace aggregates combined) at the end of 2024 remains in excess of 7 years.

6.4. At the end of 2024 the Mineral Planning Authority was in compliance with Policy AS1 of the 2014 Minerals Strategy which states that "*An adequate and steady supply of locally extracted sand and gravel will be provided by maintaining a landbank of permitted sand and gravel reserves equivalent to at least 7 years' worth of supply over the period to 2028, based on the current agreed local annual supply requirement for Bournemouth, Dorset and Poole*".

6.5. It is difficult to predict when new permissions will be needed, partially due to the as yet unworked Avon Common permission in BCP Council (as discussed below), which could be brought on-stream at relatively short notice. The River Terrace supply to central and western Dorset is fragile in the sense that Woodsford Quarry is currently the source for this aggregate in Dorset, since Chard Junction Quarry in the far west of Dorset has ceased production, following a refusal for an extension and an unsuccessful appeal in August 2022. Hurn Court Farm quarry in BCP also produces River Terrace aggregate. It is acknowledged that new permissions are required in the near future, in order to maintain the landbank. Applications for three of the allocations in the Mineral Sites Plan 2019, all in the vicinity of Woodsford Quarry, are currently being determined. These will, if permitted, provide both Poole Formation and River Terrace aggregate and would send the landbank well above 7 years.

6.6. It was calculated that in order to meet the provision of sand and gravel from 2019 to 2034, at least 10.69 million tonnes would have to be provided for through new allocations. The allocated sites in the Mineral Sites Plan provide for approximately 17 million tonnes. The MPA are satisfied that the Mineral Sites Plan 2019 identifies sufficient sites and, in conjunction with existing reserves and the unallocated sites policy in the Mineral Sites Plan 2019 the requirements of Policy AS1 of the Minerals Strategy can be met and can continue to be met. The process for developing new sites is market driven, and relies on the private sector making the necessary applications.

Imports

6.7. The AMS 2019 national survey indicates that Dorset is largely self-sufficient in land-won sand and gravel, but does import from Devon (up to approximately 70,000 tonnes), from Hampshire (up to approximately 140,000 tonnes) and from BCP Council. Although not recorded in this survey, it is expected that BCP would import sand and gravel from Dorset, and from Hampshire as well. The data collected in the national AMS 2023 is not yet available, so the most up to date position is unknown.

Monitoring Separate Poole Formation and River Terrace Aggregate Landbanks

6.8. As required by Policy AS2 of the Minerals Strategy 2014 the Mineral Planning Authority monitors separate landbanks for Poole Formation and River Terrace aggregate. This is done through monitoring sales from quarries which produce primarily one type of aggregate or the other.

6.9. As shown in **Table 5**, at the end of 2024 reserves of Poole Formation were **5.3 mt** and River Terrace were **4.2 mt**. Approximately **0.73 mt** of Poole Formation sand (**71% of total sales**), and approximately **0.30 mt** of River Terrace aggregate (**29% of total sales**), were sold in 2024.

6.10. The ten year average sales figures from 2015 to 2024 are 0.79 mtpa for Poole Formation and 0.45 mtpa for River Terrace. If these sales figures are applied to the reserve figures, they indicate that while the River Terrace landbank remains above 7 years, the Poole Formation landbank has fallen below 7 years.

Poole Formation: 5.3 mt (reserves) / 0.79 mt (10 year average to 2024) = 6.7 years

River Terrace: 4.2 mt (reserves) / 0.45 mt (10 year average to 2024) = 9.3 years

Trending Changes for Sales, Reserves and Landbanks.

6.11. Existing aggregate quarries and other facilities in Bournemouth, Dorset and Poole are set out in the Appendix to this Local Aggregates Assessment, with operational sand and gravel quarries shown in **Figure 1** and recycled aggregate sites shown in **Figure 6**. The overall level of reserves and landbanks at 31st December 2024 are shown in **Table 5** below. This Table indicates the trending changes for sales and reserves for sand and gravel and crushed rock over the past 4 years.

- Poole Formation sales increased, and the Poole Formation landbank is now under 7 years.
- River Terrace sales fell and reserves fell, but the landbank remains significantly above 7 years
- The combined River Terrace and Poole Formation sales figure increased, but the overall landbank remains above 7 years.
- The crushed rock reserves, most of which are on Portland, are estimated and remain well in excess of the 10 year requirement.

Table 5 - Sand and Gravel and Crushed Rock - Sales, Reserves and Landbank Figures

	At the end of…			
	2021	**2022**	**2023**	**2024**
Poole Formation Sales (tonnes)	846,074	770,043	670,802	726,202
Remaining Poole Formation Reserve (tonnes)	6,360,072	5,913,139	7,108,576	5,320,270
Poole Formation Landbank in years (based on ten-year sales average)	7.15	6.8	8.56	6.7
Poole Formation Landbank in years (based on three-year sales average)	7.76	7.1	9.61	7.4
River Terrace Sales (tonnes)	391,856	442,710	390,256	300,286
Remaining River Terrace Reserve (tonnes)	4,817,594	4,493,264	4,484,500	4,205,970
River Terrace Landbank in years (based on 10 year average)	9.83	9.36	9.54	9.35
River Terrace Landbank in years (based on 3 year average)	12.04	10.96	10.94	11.07

	2021	2022	2023	2024
Total (River Terrace and Poole Formation) Sales (tonnes)	1,237,930	1,212,753	1,061,058	1,026,488
Remaining River Terrace and Poole Formation Reserve (tonnes)	11,177,666	10,406,403	11,593,076	9,526,240
River Terrace and Poole Formation Landbank in years (based on 10 year average)	8.1	7.65	8.92	7.68
River Terrace and Poole Formation Landbank in years (based on 3 year average)	9.09	8.46	10.08	8.66
Land-Won Crushed Rock Sales (tonnes)	233,251	122,168	171,162	179,842
Remaining Reserve [5] (tonnes)	c. 11,500,000	c. 11,370,000	c. 13,570,000	c. 12,859,415
Crushed rock Landbank in years (based on 10 year average)	c. 55	c. 54	c. 65	c. 64
Crushed rock Landbank in years (based on 3 year average)	c. 55	c. 63	c. 75	c. 80

NB: These figures for sand and gravel include usage for both aggregate and non-aggregate purposes.

[5] NB The estimated remaining reserve of land-won crushed rock was re-assessed in 2016 to account for areas where the permission on Portland had been relinquished.

7. Allocated Sites

7.1. In addition to supply from current permissions, the Bournemouth, Christchurch, Poole and Dorset Mineral Sites Plan 2019 (MSP) allocated (via **Policy MS-1: Production of Sand and Gravel**) 7 new sites or extensions, as shown in **Table 6** below.

7.2. The policy states that these sites will be permitted, provided they meet certain criteria. Of these 7 allocations, one (AG3 Tatchell's Quarry Extension) has already been permitted, although the permission subsequently lapsed. Applications have been submitted for three other sites, AG4 Woodsford Extension, AG5 Station Road and AG6 Hurst Farm and are currently being determined.

Table 6 – Mineral Sites Plan 2019 - Status of Aggregates Site Allocations

Site Name	Mineral Type and Amount (as allocated in the Mineral Sites Plan 2019)	Commentary
AG1 Great Plantation, Puddletown Road, East Stoke	Approximately 2,000,000 tonnes of primarily Poole Formation sand	No approach made to MPA.
AG2 Roeshot Quarry Extension, Christchurch	Approximately 3,500,000 tonnes of primarily River Terrace aggregate	No approach made to MPA. The Roeshot Hill site is in two parts, one in Hampshire and one in BCP Council. The Hampshire part has been permitted, the BCP

Site Name	Mineral Type and Amount (as allocated in the Mineral Sites Plan 2019)	Commentary
		part will not be considered for development for some years yet.
AG3 Tatchell's Quarry Extension, Wareham	Approximately 330,000 tonnes of sand with some gravel	Permitted but not implemented, and the permission expired before it was implemented.
AG4 Woodsford Quarry Extension, Woodsford	Approximately 2,100,000 tonnes of primarily River Terrace aggregate	**Application for extraction of 3.0 mt received and under determination.**
AG5 Station Road, Moreton	Approximately 3,100,000 tonnes comprising River Terrace and Poole Formation aggregate	**Application for extraction of 5.5 mt received and under determination.**
AG6 Hurst Farm, Moreton	Approximately 3,300,000 tonnes comprising River Terrace and Poole Formation aggregate	**Application for extraction of 6 mt received and under determination.**
AG7 Land at Horton Heath, Horton	Approximately 3,500,000 tonnes comprising primarily Bagshot Sand with some gravel	No approach made to MPA.

7.3. In addition, **Policy MS-2:** Unallocated **Sand and Gravel Sites** of the MSP refers to permitting unallocated sand and gravel sites provided they meet certain criteria and are located within the Aggregate Resource Blocks designated through Policy AS1 of the Minerals Strategy 2014. No applications under, or expressions of interest about, this policy have yet been received by the Mineral Planning Authority.

8. Supply of aggregate and productive capacity of current sites

8.1. A site capacity question is included as part of the regular Aggregate Monitoring survey to assist in understanding how much any site is (potentially) capable of producing working at full capacity, and this can assist in planning for future demand. The results are shown in **Table 7**. Not all operators responded.

8.2. **Table 7** indicates that for land-won aggregate, there is the potential for sales to be higher than currently recorded, with sites currently producing at approximately 65% of capacity.

Table 7 – Indicative Productive Capacity

	Sales 2024 (tonnes)	Capacity[6] (tonnes)	Sales as % of capacity
Poole Formation sites	**726,202**	**1,150,000**	**63%**
River Terrace sites	**300,286**	**450,000**	**67%**
Totals	**1,026,488**	**1,600,000**	**64%**

[6] NB: Not all operators have returned figures, so there is at present no complete knowledge of capacity – actual capacity will be higher than the figures recorded in Table 7

8.3. As noted in **Tables 3** and **25**, there is an existing permission at Avon Common just off the A338, within BCP Council, to the north of Christchurch. It is an implemented permission granted in 2007 that has not yet been worked, with an (expected) permitted reserve of some 1.8 mt of River Terrace aggregate. As a permitted reserve it comprises part of the landbank.

8.4. The Avon Common reserve figure tends to mask the fact that supply of River Terrace aggregate within central and south-eastern Dorset and in BCP relies on Woodsford Quarry to the east of Dorchester and Hurn Court Farm at Parley adjacent to Bournemouth Airport – together with imports from Hampshire. Within Dorset there are only these two quarries supplying River Terrace aggregate. Chard Junction Quarry is exhausted, and in restoration.

8.5. Should any of these sites for some reason cease production it is expected that supply chains would adjust, and demand would be met from other quarries, including from quarries around Dorset/BCP. This could in some cases require significantly longer transportation distances, and lead to an increased demand for sand and gravel from Hampshire, or crushed rock from Somerset. There would likely be a period of time when Dorset/BCP were not meeting the expected annual supply rate.

8.6. The site allocations in the Mineral Sites Plan 2019 include both Poole Formation and River Terrace producing sites. The Mineral Planning Authority is satisfied that there is adequate provision for new aggregate supply through site allocations in the Mineral Sites Plan 2019 and the unallocated sites policy. It is impossible to predict when any of these allocations will be developed, but indications are three allocations are under active consideration by developers. The sites are all in private ownership, and market forces will dictate when applications come forward for the development and working of these sites. There is no certainty that any allocation will actually be approved for development following the rigorous assessment process of a planning application. A decreasing landbank should encourage applications. The fact that the landbank is above 7 years will not preclude such applications.

9. Aggregate Supply from other Mineral Planning Authorities

9.1. The national Aggregate Minerals Survey 2014 indicated that Dorset (including Bournemouth and Poole) consumed approximately 730,000 tonnes of sand and gravel[7] of which approximately 80%-90% was produced in Dorset and 10%-20% was imported from Hampshire, with very small amounts from other mineral planning authorities, including Devon and Wiltshire.

9.2. This was updated by the 2019 AMS national survey, which showed that a similar amount of sand and gravel (727,000 tonnes[8]) was consumed in Dorset (which is taken to include Bournemouth, Christchurch and Poole). However, the main difference with this survey is the fact that in April 2019 Christchurch Borough became part of BCP Council. There is one active sand and gravel site in BCP Council, which supplies aggregate to both Dorset Council and BCP Council. Devon CC and Hampshire CC were the other neighbouring MPAs which supplied sand and gravel to Dorset Council.

Table 8 – Sand and Gravel Consumed in Dorset in 2019 - Supply Sources

Source MPA	% supply	Tonnes
BCP Council	**10 – 20 %**	**72,700 - 145,400**
Devon County Council	**1 - 10 %**	**7,270 - 72,700**
Dorset Council	**70 – 80 %**	**508,900 - 581,600**
Hampshire County Council	**10 – 20 %**	**72,700 - 145,400**
Other	**< 5 %**	**c. 36,350**

[7] Information provided by the British Geological Survey – from 2014 AM survey.

[8] Also from the British Geological Survey – 2019 AM survey.

9.3. Of the 727,000 tonnes of sand and gravel consumed in Dorset in 2019, **Table 8** above shows the source MPAs and approximate amounts supplied.

9.4. The 2019 AM survey also indicated that Dorset (with BCP) consumed approximately 287,000 tonnes of crushed rock. **Table 9** shows the source MPAs and approximate amounts supplied:

Table 9 – Crushed Rock Consumed in Dorset in 2019 - Supply Sources

Source MPA	% supply	Tonnes
Devon County Council	**1 - 10 %**	**2,870 – 28,700**
Dorset Council	**40 - 50 %**	**114,800 – 143,500**
North Somerset	**1 - 10 %**	**2,870 – 28,700**
Somerset County Council	**40 - 50 %**	**114,800 – 143,500**
Leicestershire County Council	**1 - 10 %**	**2,870 – 28,700**
Powys	**1 - 10 %**	**2,870 – 28,700**
Other	**< 5 %**	**c. 5,700**

9.5. The British Geological Survey (BGS) do not indicate the amount of sand and gravel (or crushed rock) consumed in BCP or where it came from. However, source MPAs to BCP would primarily be Dorset Council and Hampshire County Council. The supply from Hampshire is expected to be maintained, with two site allocations identified in the Hampshire Minerals and Waste Plan 2013 (Purple Haze at Verwood and Roeshot at Christchurch - the latter now permitted and an application currently being determined for the former) being immediately adjacent to Dorset. It is expected that these sites, should both be permitted, will provide a significant local supply of aggregate to Dorset and BCP Councils.

9.6. In addition, an application from CEMEX for sand and gravel at Midgham Farm adjacent to Alderholt is expected by the end of 2024, or in 2025. This site is almost entirely in Hampshire, apart from a small strip in Dorset. This site, should it ultimately be permitted, would be a significant producer of sand and gravel for Hampshire and Dorset, replacing the Hamer Warren quarry.

10. Other Sources of Aggregate Supply for Dorset

10.1. In addition to land-won aggregate, there are other sources of aggregate that Dorset and BCP can rely on, including:

- marine dredged aggregate – sand and gravel dredged from the licensed dredging areas off the south coast
- recycled aggregate – aggregate recycled from the processing of construction, demolition and excavation waste (CDEW), at either fixed processing sites or at construction sites

10.2. Secondary aggregates, materials produced as industrial by-products such as foundry sand or crushed glass, are not currently produced in Dorset or BCP. In the past, spent foundry sand has been imported into Poole for use at the asphalt plant there, but none was imported in 2024. Secondary aggregates can also be by-products of other mineral extraction as in the case of the sand removed to access underlying ball clay. However, in Dorset sand from this source is included with primary aggregate and is not recorded separately. The following analysis reviews recent levels of supply of marine dredged and recycled aggregate and considers the likelihood of their supply being maintained.

11. Marine Dredged Aggregate

11.1. Marine dredged sand and gravel is extracted from the sea bed from licensed areas. Along the south coast, these include areas off the coast of Hampshire, the Isle of Wight and West Sussex. These deposits of marine aggregate (sand and gravel) are considered to be fluvial, fluvio-glacial, or beach deposits formed during glacial episodes within the last 2 million years when sea levels were lower. Mineral rights for marine sand and gravel are owned by the Crown Estate, and extraction can only take place following the award of a marine licence by the Marine Management Organisation.

Poole Wharf

11.2. The only wharf currently landing marine dredged aggregates is Poole Wharf, operated by CEMEX in the Port of Poole. Landings were historically relatively constant at around 90,000 tonnes per annum, but this figure has been decreasing and reached a low of 0.03 mt in 2023. This figure increased to 0.04 mt is 2024, as shown in **Table 10**. The ten year average of marine aggregate landings at Poole Wharf is approximately 70,000 tonnes per annum (tpa), and the three year average is approximately 40,000 tpa.

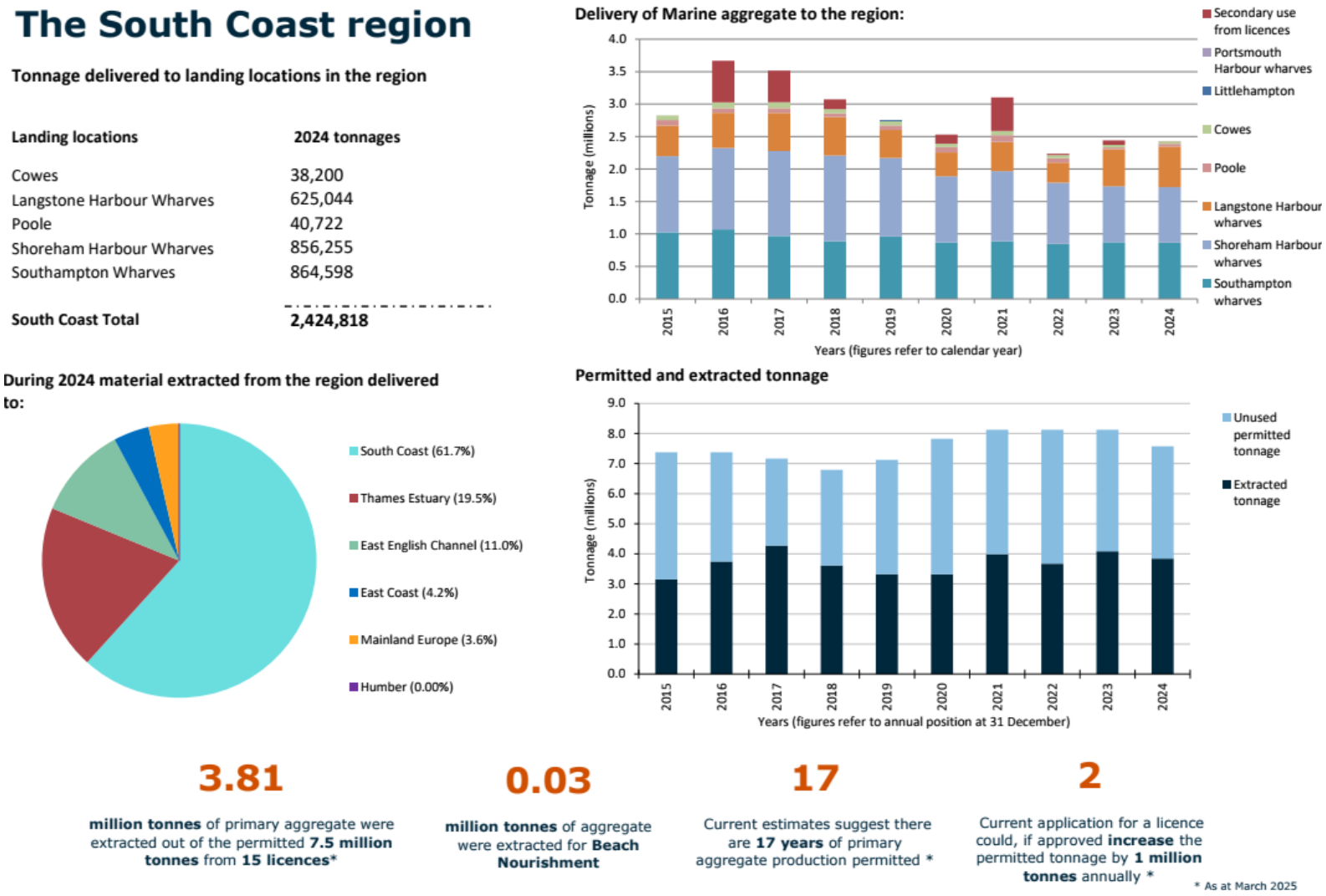
Table 10 – Summary of Marine Dredged Landings (mt)

	2015	2016	2017	2018	2019	2020	2021	2022	2023	2024	10 YEAR AVERAGE	3 YEAR AVERAGE
Marine Dredged Sand and Gravel	**0.09**	**0.08**	**0.07**	**0.06**	**0.07**	**0.08**	**0.10**	**0.07**	**0.03**	**0.04**	**0.07**	**0.04**

11.3. Marine aggregate makes a relatively small contribution to the supply of aggregate in Dorset (approximately 2.4% in 2024) and much of what is landed is likely to be used within the Poole/Bournemouth/Christchurch conurbation. In 2014, approximately 70% of marine dredged sand and gravel landed was consumed within Dorset (including Poole/Bournemouth). In 2019, this figure was 90-100%. The marine aggregate landed at Poole Wharf is from the South Coast dredging region.

11.4. The Crown Estate produces an annual report on reserves, extraction, landings, the relevant sections of which are set out below. **Figure 4** provides information on landings along the south coast, and **Figure 5** shows the resource and reserves.

Figure 4 - Marine Dredged Aggregate – South Coast Region [9]



[9] *Marine Aggregates - The Crown Estate Licences - Summary Of Statistics 2024* Crown Estate 2025

Figure 5 – Reserves and Resources [10]

Region	Total current primary reserves	10-year average annual offtake	3-year average annual offtake	Peak annual offtake during 10-year period*	Annual permitted offtake (as March 2024)	Regional reserve life @ 10-year average annual offtake
		Primary (construction aggregate)				
Humber	36.76	2.83	3.49	3.69	6.88	12.97
East Coast	28.27	3.77	3.37	4.48	7.13	7.51
Thames Estuary	29.24	1.59	1.54	1.94	4.70	18.34
East English Channel	195.05	4.11	3.97	4.65	11.97	47.46
South Coast	60.64	3.53	3.83	4.02	7.58	17.16
South West	26.96	1.30	1.30	1.43	2.80	20.82
North West	9.20	0.26	0.25	0.32	0.90	35.93
TOTAL	**386.12**	**17.39**	**17.74**	**18.10**	**41.94**	**22.20**

All figures are in millions of tonnes

*Totals are national peaks, not the sum of regional figures

[10] *Marine Aggregates - The Crown Estate Licences - Summary Of Statistics 2024* Crown Estate 2025

Constraints and Future Supply

11.5. The main constraints affecting future supply are the amount and availability of licensed areas for dredging and the capacity of the wharf to handle the material landed. As the Poole wharf is a relatively small wharf, storage and handling capacity is limited. The wharf is safeguarded through the Bournemouth, Dorset and Poole Minerals Strategy (2014) and the Bournemouth, Christchurch, Poole and Dorset Mineral Sites Plan 2019. It has no planning restrictions regarding imports of aggregate. Capacity is influenced by factors such as the size and availability of dredgers, the permitted rates of dredging, the capacity of the wharf to handle dredgers and navigational restrictions.

11.6. Industry notes that while the wharf in Poole Harbour has some constraints (related to access to the berth, which requires supplying vessels to 'book in'), this is not believed to represent a constraint that limits the supply to the historic levels of around 90,000 tonnes. Instead, the level of supply provided relates to the scale of market demand that exists for marine products, compared to the wider portfolio of supply options. If the market demand altered or the balance of the supply portfolio changed, marine supplies could potentially play a larger role if required. It is understood from the operator that there is the potential for further tonnage to be landed should the market demand exist.

11.7. As shown in **Figure 5**, the *Marine Aggregates - The Crown Estate Licences - Summary Of Statistics 2024* report indicates that for the South Coast area, current estimates are that there are 17 years of permitted reserves currently available, indicating that a continuation of supply (or even an increase, should the need arise) is expected to be possible from this source.

12. Recycled Aggregates

12.1. Recycled aggregates are usually construction, demolition and excavation (CDE) wastes such as brick, concrete, soils and sub-soils and road planings which can be re-used as aggregate, usually after some form of processing. This processing can include screening, sorting, crushing, washing or blending with land-won aggregate. Processing generally takes place either at fixed

recycling sites (including at quarries) where the product is sold on the open market; or at temporary, mobile plant sites (e.g. construction sites), where the demolition or extraction waste is processed and either re-used on site or sold.

12.2. Recycled aggregates reduce the demand for land-won or marine aggregate and have a range of uses, including bulk fill for construction projects or as base layers for roads and other built development. When recycled aggregate is blended with land won material, as referred to earlier, the resultant 'hybrid' material can be used for higher specification applications.

12.3. Sales from known fixed (temporary or permanent permissions) recycling sites in 2024 were approximately 444,170 tonnes, a decrease over the previous year. The ten year average of sales is approximately 430,000 tonnes per annum and the three year average is approximately 460,000 tonnes. The 2024 figure include some estimates due to a lack of returns from some operators.

Table 11 – Summary of Recycled Aggregate Sales (mt)

	2015	2016	2017	2018	2019	2020	2021	2022	2023	2024	10 YEAR AVERAGE	3 YEAR AVERAGE
Recycled aggregates	**0.33**	**0.35**	**0.37**	**0.39**	**0.59**	**0.39**	**0.48**	**0.44**	**0.49**	**0.44**	**0.43**	**0.46**

12.4. In 2024 there were 14 known fixed aggregate recycling sites, as illustrated in **Figure 6** and **Table 12**.

Figure 6 – Fixed Aggregate Recycling Facilities 2024

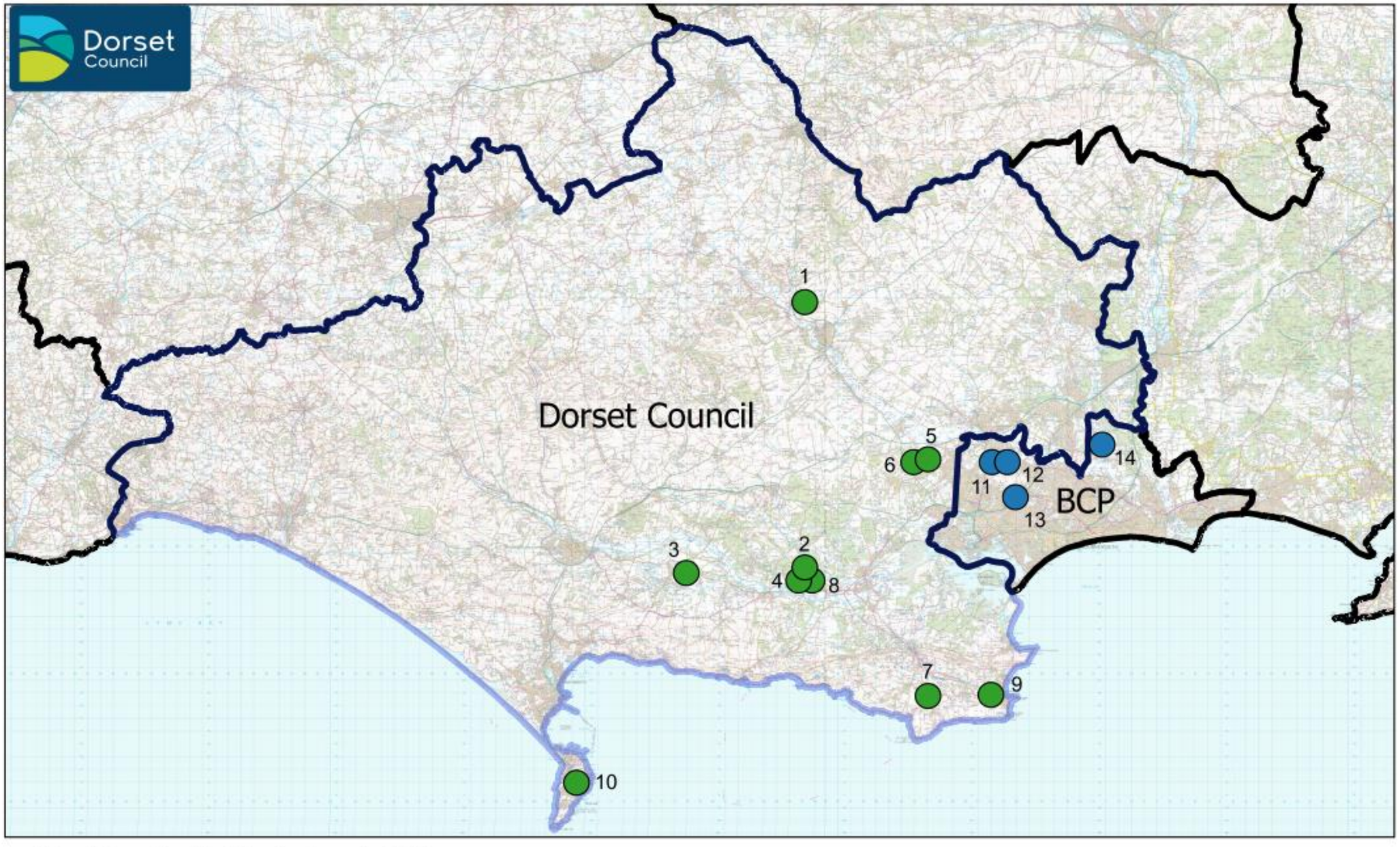


Table 12 - Recycled Aggregate Sites and Operators

Ref No	Site Name	Site Operator	MPA	End Date
1.	Downend Farm, Blandford Forum	Mark Farwell Plant Hire Ltd	Dorset Council	Permanent
2.	Spratley Wood, Puddletown Road	Mr P Andrews	Dorset Council	30 September 2032
3.	Redbridge Road Quarry, Moreton	G Crook & Sons	Dorset Council	31 December, 2022
4.	Masters Quarry, Puddletown Road	New Milton Sand & Ballast	Dorset Council	31 December 2032
5.	Henbury Plantation, Wimborne	MB Wilkes Ltd	Dorset Council	…
6.	Henbury Allasso, Wimborne	Allasso	Dorset Council	Permanent
7.	Swanworth Quarry, Purbeck	J Suttle Transport	Dorset Council	31 December 2044
8.	Hines Pit, Puddletown Road	The Waste Group Ltd.	Dorset Council	Permanent
9.	Victoria Avenue, Swanage	The Waste Group Ltd.	Dorset Council	Permanent
10.	Broadcroft Quarry	Portland Stone Ltd	Dorset Council	31 December 2028
11.	Canford Recycled Aggregates Site	Avon Material	BCP	Permanent
12.	Whites Pit – crushing and washing plant site	Supplies Ltd.	Council	Permanent
13.	Manning's Heath Depot (Haymoor Bottom),	J Suttle Transport	BCP Council	31 December 2032
14.	Parley Composting and Parley Road Sweepings, Chapel Lane, Parley	Eco Sustainable Solutions	BCP Council	Permanent

12.5. In addition to these fixed recycling sites it is expected that an amount of recycled aggregate is produced at development/construction sites, using mobile crushing/processing plant. It is however difficult to estimate how much this might be. Paragraph 4.31 of the Survey of Arisings and Use of Alternatives to Primary Aggregates11 suggests that of the total sales of recycled aggregate, some 80% is derived from fixed sites with an additional 20% from short-term construction sites. Given that this report is dated 2007, it may be that the proportion from mobile plant is now even higher as plant efficiency increases. Applying an 80/20 split to the 2024 sales, actual production in 2024 could have been as high as approximately 614,800 tonnes.

Capacity, Constraints and Future Supply

12.6. The total permitted capacity for aggregate recycling production is approximately 940,000 tonnes[12], above the level of current or average sales. Existing recycling sites potentially have capacity to increase sales in response to demand, should this be required. Constraints to increasing sales include:

- availability of material to be recycled
- distance from source materials for recycling
- distance from markets for recycled aggregate, and
- loss of aggregate recycling sites through site closure or ending of temporary planning permission without renewal or being made permanent.

12.7. Demand will be affected by the limited range of applications of the product, the availability/price of other sources of aggregate and whether recycled aggregate would be technically suitable for specific needs. As the 2014 Minerals Strategy encourages

11 Capita Symonds Ltd, in association with WRc plc. February 2007, Department for Communities and Local Government : London

12 Bournemouth, Dorset & Poole Minerals Strategy (2014)

increased sales and permitted capacity far exceeds current supply, it is expected that supply will increase as dictated by market demand and subject to availability of material to be recycled.

13. Uses of Dorset's Aggregate Resource

13.1. Aggregates have a range of uses in construction, with Dorset's aggregates being primarily for concrete, road construction and road maintenance (including asphalt making). Other uses include constructional fill and armourstone (crushed rock). aggregates, such as silica sand, have other uses including industrial uses (glass making, foundry sand) or for recreational uses (e.g. horse training areas). Dorset's silica sand is not suitable for high-end uses such as glass-making, but is uses for animal bedding and horse training areas. The physical properties of some aggregates (e.g. strength, shape) make them more suitable for some uses than others – for example, most Dorset limestone is relatively soft and not suitable for road construction or concrete manufacture.

13.2. The AMS for 2014 national survey showed that:

- for Dorset's land-won sand and gravel, the main uses are sand for concreting (54%) with gravel for concrete (17%) and sand for use in mortar (14%)
- for Dorset's crushed rock, the main uses are other screened and graded aggregates (51%) and Type 1 and 2 uncoated roadstone (34%)
- marine dredged aggregate was primarily used as sand or gravel for concreting, mostly within Dorset but also elsewhere in the South-West.

13.3. The AMS 2019 national survey shows that:

- For local land-won sand and gravel, concreting (sharp) sand, gravel for concrete and soft sand for use in mortar remain the main construction aggregate uses for local land-won sand and gravel, in generally similar proportions
- 8% of sales went for non-aggregate use, e.g. animal bedding
- for crushed rock, not all sales returns were allocated to specific uses. However, of those that were, almost twice as much Type 1 and 2 Uncoated Roadstone was sold as was Other Screened and Graded Aggregates
- marine dredged aggregate was again primarily used for concrete, and other construction uses; most of the material landed in Poole remained in Dorset/BCP with a small amount exported to Hampshire

13.4. Although the full AMS 2023 national survey is not yet available, data collected for Dorset and BCP for this survey indicates that in 2023 for Dorset and BCP:

- For local land-won sand and gravel, the main uses were sand for concreting (48%), sand for mortar (28%) and gravel for concreting (20%)
- Approximately 11% of the sand was for non-aggregate uses
- For locally produced crushed rock, 96% was used for uncoated roadstone (Type 1 and 2 materials) and 3% for other screened and graded aggregates.

14. Exports from Dorset

14.1. This section of the report considers movement of aggregates, including movements between Dorset and other mineral planning authorities, as informed by the national Aggregate Minerals Surveys.

14.2. **Table 14** shows that of the locally produced land-won sand and gravel sold in 2019, 58.2% was consumed in Dorset; 19.1% was exported to Dorset's immediate neighbours, 21% was exported to the rest of the south west and 0.9% was exported outside of the south-west (excluding Hampshire, which was included as one of Dorset's neighbours). Comparing this to **Table 13**, the results of the AM2014 survey, shows decreased sales generally along with relatively lower exports to Dorset's immediate neighbours and outside the south-west, with a higher proportion of exports to the south west apart from Devon, Somerset and Wiltshire.

14.3. For crushed rock and to a lesser extent marine dredged sand and gravel (**Tables 15 to 20**), a much higher proportion of what is produced in Dorset remains in Dorset. This is particularly true for crushed rock, with 95% of local production remaining within Dorset - the Jurassic limestone produced in Dorset is relatively soft and is used for lower specification uses. It does not travel far. **Tables 17 and 20** show that in 2024 locally produced crushed rock **(17)** and marine dredged sand and gravel landed at Poole Wharf **(20)** were both almost entirely consumed within Dorset/BCP, with very small exports out of Dorset/BCP.

Sand and Gravel

Table 13 – Destination of Land-Won sand and gravel aggregate sold in Dorset in 2014 (AM 2014)

	Total Sales	Dorset	Hampshire, Wiltshire, Somerset and Devon	Rest of South West	Outside South West (excluding Hampshire)
mt	**1.73**	**0.86**	**0.58**	**0.15**	**0.15**
%	**100%**	**49.4%**	**33.6%**	**8.5%**	**8.5%**

Figures in million tonnes (mt)

Table 14 – Destination of Land-Won sand and gravel aggregate sold in Dorset in 2019 (AM 2019)

	Total Sales	Dorset	Hampshire, Wiltshire, Somerset and Devon	Rest of South West	Outside South West (excluding Hampshire)
mt	**1.1**	**0.64**	**0.21**	**0.23**	**0.01**
%	**100%**	**58.2%**	**19.1%**	**21%**	**0.9%**

Figures in million tonnes (mt)

Destination of Land-Won sand and gravel aggregate sold in Dorset in 2024

14.4. As one of the larger producers of aggregate did not provide destination data for 2023, it is difficult to present the overall data in a tabular form. However, the data available shows that the main destinations are Dorset and BCP (33%) and Unknown (somewhere in South West) (27%). Somerset, Devon and Hampshire together accounted for some 10% of the destination of aggregate from Dorset, with Somerset being by far the largest consumer.

Crushed rock

Table 15 – Destination of Crushed Rock aggregate sales from Dorset in 2014 (AM 2014)

	Total Sales	Dorset	Hampshire, Wiltshire, Somerset and Devon Rest of South West	Outside South West	Outside South West (excluding Hampshire)
mt	0.28	0.27		0.008	
%	100%	97.2%		2.8%	

Figures in million tonnes (mt)

Table 16 – Destination of Crushed Rock aggregate sales from Dorset in 2019 (AM 2019)

	Total Sales	Dorset	Hampshire, Wiltshire, Somerset and Devon	Rest of South West	Outside South West (excluding Hampshire)
mt	0.21	0.20		0.01	
%	100%	95%		4.8%	

Figures in million tonnes (mt)

Table 17 – Destination of Crushed Rock aggregate sales from Dorset in 2024

	Total Sales	Dorset	Hampshire, Wiltshire, Somerset and Devon	Rest of South West	Outside South West (excluding Hampshire)
mt	0.17	0.17	-	-	-
%	100%	99.8%	-	-	-

Figures in million tonnes (mt)

14.5. Locally produced crushed rock is almost entirely consumed within Dorset and BCP. The remainder of the material goes outside the South West.

Marine Dredged

Table 18 – Destination of Marine Dredged aggregate sales from Dorset in 2014 (AM 2014)

	Total Sales	Dorset	Hampshire, Wiltshire, Somerset and Devon	Rest of South West	Outside South West (excluding Hampshire)
mt	0.93	0.67	0.02	0.26	0
%	100%	72%	0.2%	28%	0

Figures in million tonnes (mt)

Table 19 – Destination of Marine Dredged aggregate sales from Dorset in 2019 (AM 2019)

	Total Sales	Dorset	Hampshire, Wiltshire, Somerset and Devon	Rest of South West	Outside South West (excluding Hampshire)
mt	0.07	0.06	0.01	0	0
%	100%	85.7%	14.3%	0	0

Figures in million tonnes (mt)

Table 20 – Destination of Marine Dredged aggregate landings from Dorset in 2024

	Total Sales	Dorset	Hampshire, Wiltshire, Somerset and Devon	Rest of South West	Outside South West (excluding Hampshire)
mt	0.02	0.02	-	-	-
%	100%	100%	-	-	-

Figures in million tonnes (mt)

14.6. Again, marine dredged landings are virtually all consumed within Dorset/BCP. A very small amount goes to Hampshire.

15. Consumption within Dorset

15.1. The AM2014 report along with additional material made available by the British Geological Survey[13] shows that in 2014, Dorset consumed:

- approximately 732,000 tonnes of land-won sand and gravel - some 80-90% of this was produced within Dorset, with 10% to 20% coming in from Hampshire. Dorset is largely self-sufficient in land-won sand and gravel, and it is expected that the imports from Hampshire are supplying those areas close to the county boundary
- approximately 68,000 tonnes of marine dredged sand and gravel – the majority (up to 90%) of which was landed in Dorset (Poole) and up to 10% imported from Hampshire, and
- approximately 531,000 tonnes of crushed rock, of which approximately 50% was produced in Dorset and 50% imported from Somerset

15.2. For AM2019[14], the corresponding figures show that in 2019 Dorset consumed:

- approximately 727,000 tonnes of sand and gravel, with the majority (70-80%) produced in Dorset, 10-20% imported from Hampshire and 1-10% imported from Devon
- approximately 59,000 tonnes of marine dredged sand and gravel, the majority (up to 100%) landed in Dorset and potentially small amounts being imported from Hampshire and/or Southampton
- approximately 287,000 tonnes of crushed rock, with up to 50% produced in Dorset, up to 50% imported from Somerset and relatively small amounts imported from Devon, North Somerset and Leicestershire.

[13] AM2014 source of primary aggregates by sub-region – percent categories (British Geological Survey, 2016)
[14] AM2019 source of primary aggregates by sub-region (British Geological Survey, 2021)

15.3. The relevant figures from AMS 2023 national survey are not yet available, and will be reported in the next Local Aggregates Assessment.

16. Future Demand

16.1. Aggregates are primarily used in construction of new infrastructure and other built development, along with the maintenance of existing infrastructure. Future demand for aggregates will therefore be influenced by future levels of construction activity, including new development and maintenance of existing infrastructure. Dorset is affected by demand both within and outside of Dorset Council and BCP Council. Overall land-won sand and gravel sales for the south west sub-national area have generally declined since 2001, while sales have been more steady for Dorset itself (**Table 21** below).

16.2. The reason for this, compared with the fall outside of Dorset, is not clear but could be due to various factors including the fact that Dorset is a supplier of aggregate (particularly Poole Formation sand) to other parts of the country such as south-east England, including London, and elsewhere in the south west.

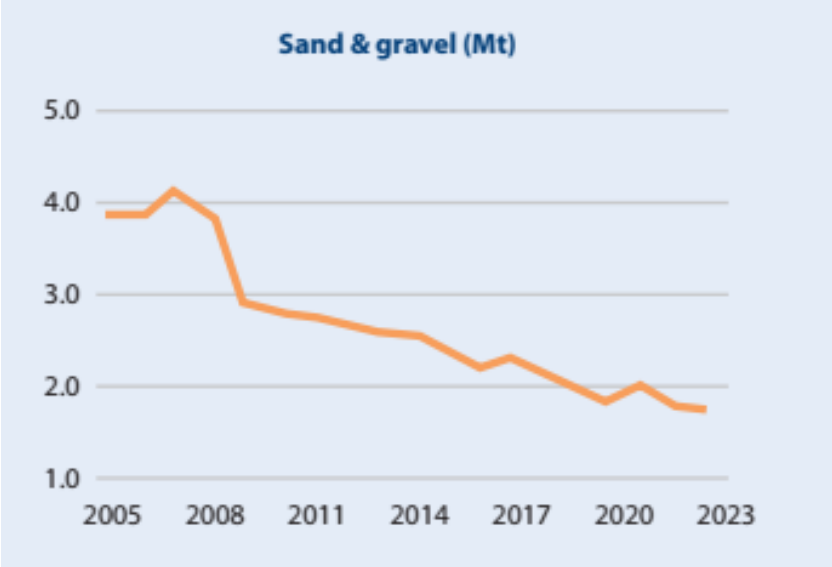
Table 21 – Land-won sand and gravel sales – Dorset and South-West compared[15]

Year	Land-won sand and gravel sales – Dorset (tonnes)	Land-won sand and gravel sales – South West AWP (tonnes)
2001	**1,605,000**	**5,604,000**
2005	**1,684,000**	**4,603,000**

[15] Collation of the results of the 2001 Aggregate Mineral Survey for England and Wales (Prepared by British Geological Survey on behalf of ODPM 2001). Similarly for the 2005, 2009, 2014 and 2019 reports, though these were commissioned by Department for Communities and Local Government.

Year	Land-won sand and gravel sales – Dorset (tonnes)	Land-won sand and gravel sales – South West AWP (tonnes)
2009	1,273,000	3,152,000
2014	1,605,000	3,278,000
2019	1,090,000	2,870,000
2023	1,061,058	2,255,000

Figure 7 - Sand and Gravel Sales Totals 2005 – 2023 for South West England (Source: MPA)



The Mineral Products Association publication *Regional Overview Of Construction And Mineral Products Markets in Great Britain Spring 2023*[16] illustrates a number of years of declining sand and gravel sales in the south-west. This is illustrated in this excerpt from the report.

[16] ***Regional_overview_of_construction_and_mineral_products_markets_in_Great Britain 2024 edition_ Spring_2023***: MPA 2024

Built development.

16.3. To help assess the future demand for aggregates this section looks at housing numbers in the sub region. It is noted that published Mineral Products Association data shows that new housing only forms circa 25% of 'construction output' (as a proxy for demand) with repair and maintenance, commercial and infrastructure development forming higher proportions. Continued monitoring will indicate if the increase in demand for aggregate is such that further action is required. Existing reserves and new site allocations remain available to meet demand. **Table 22** below shows the levels of housing development that are planned for in adopted plans. Although the plans cover different time periods they give a good indication of the levels of housing development anticipated over the next 5 to 10 years.

Table 22 - Proposed Housing Development in current adopted Local Plans / Development Plan Documents in Bournemouth, Christchurch, Poole and Dorset

Local Authority	Local Plan / DPD	Status	Plan period	Total Proposed dwellings	Annual average rate (dwellings per annum)
Bournemouth Borough Council	Bournemouth Core Strategy	Adopted 2012	2006 – 2026	14,600	**730**
Borough of Poole	Poole Local Plan	Adopted 2018	2013-2033	14,200	**710**

Local Authority	Local Plan / DPD	Status	Plan period	Total Proposed dwellings	Annual average rate (dwellings per annum)
Christchurch Borough Council + East Dorset District Council	Christchurch and East Dorset Core Strategy	Adopted 2014	2013 – 2028	8,490	**566**
North Dorset District Council	North Dorset Local Plan Part 1	Adopted 2016	2011 – 2031	5700	**285**
Dorset Council (former Purbeck district area)	Purbeck Local Plan	Adopted 2024	2018 - 2034	2,976	**186**
West Dorset District Council + Weymouth and Portland Borough Council	West Dorset, Weymouth and Portland Local Plan	Adopted 2015	2011 – 2031	15,500	**775**
Bournemouth, Dorset and Poole				**61,457**	**3,252**

Source: Dorset County Council Economy and Enterprise - BDP Local Plan/Core Strategy Monitoring. Historic Levels of Development.

16.5. **Table 23** shows the historic levels of housing completions in Dorset and Bournemouth/Poole over the 10 years 2013/14 – 2022/23. There was a sharp divide in the level of development pre- and post- 2009 when the housing recession really began to bite. Completions pre 2009 were over 3,000 every year, hitting 3,700 in 2005/6, whereas from 2009/10 they fell below 2000

dwellings per annum, only recovering in 2014/15. For 2015/16, they approached 3,000 completions per annum, however there was a fall in 2016/17 to just over 2000. Completions reached a high of 3,123 in 2019/20. In 2023/24 they were 2,392.

16.6. For comparison, figures for annual sand and gravel sales, from 2014 to 2024, have been added to **Table 23**, demonstrating some level of correlation between housing completions and aggregate sales, although there is often a bit of a lag. In 2022/23, aggregate sales fell while housing completions remained steady. In 2023/24 aggregate sales increased, while completions decreased slightly.

Table 23 - Net Annual Completions

Local Authority	2014/15	2015/16	2016/17	2017/18	2018/19	2019/20	2020/21	2021/22	2022/23	2023/24
~~Christchurch~~										
~~East Dorset~~	163	236	148	319	289					
~~North Dorset~~	178	220	142	159	223					
~~Purbeck~~	67	232	86	122	73					
~~West Dorset~~	251	465	603	421	640					
~~Weymouth and Portland~~	148	201	169	212	289					
Dorset Council	**807**	**1,354**	**1,148**	**1,233**	**1,514**	**1,432**	**1,388**	**1,818**	**1,687**	**1,480**
~~Bournemouth~~	964	817	337	635	659					
~~Poole~~	199	438	591	307	426					
Christchurch	154	125	180	100	187					
BCP Council	**1,317**	**1,380**	**1,108**	**1,042**	**1,272**	**1,700**	**787**	**696**	**773**	**912**
Totals (BCP/Dorset)	**2,141**	**2,899**	**2,110**	**2,270**	**2,786**	**3,123**	**2,166**	**2,514**	**2,460**	**2,392**
Sand and gravel sales (mt)	**1.5**	**1.39**	**1.27**	**1.19**	**1.19**	**1.25**	**1.24**	**1.21**	**0.99**	**1.03**

From https://www.gov.uk/government/statistical-data-sets/live-tables-on-net-supply-of-housing

https://assets.publishing.service.gov.uk/government/uploads/system/uploads/attachment_data/file/1119761/Live_Table_122.ods

…and also supplemented by local authority housing data

17. Projected development beyond current Plan periods

17.1. Although it is not clear what future levels of development will be, it remains a key objective of national planning policy as set out in the National Planning Policy Framework to 'boost significantly' the supply of housing. Over the period 2013-2023, Dorset's population grew by 17,200, a growth of 4% compared with 7% nationally. Over the period 2023 to 2033, the population is projected to grow by another 3% (12,654) compared to 4% nationally.

17.2. Following Local Government Reorganisation, from April 2019 the district/borough, unitary and county authorities making up Bournemouth, Dorset and Poole were replaced by Dorset Council and Bournemouth Christchurch and Poole (BCP) Council. Both new authorities have begun preparation of new local plans, although these will not include minerals or waste provision. Until the new plans are adopted, or well on the way to being adopted, the existing plans (**Table 22**) will continue to guide development. The former Purbeck District Council's emerging local plan the Purbeck Local Plan (2018-2034) having undergone examination, was adopted in 2024.

17.3. Across the area as a whole, some 3,186 new dwellings are currently planned per annum (**Table 22**). This figure is likely to rise in coming years with the preparation of new Local Plans and the application of the revised approach to determining future housing need.

17.4. Both Dorset Council and Bournemouth, Christchurch and Poole Council are preparing new Local Plans to replace the existing Local Plans. The new Local Plans will need to aim to meet the housing needs derived from the Government's Standard Methodology, which is subject to change as new data is released. For Dorset Council, the housing needs identified through the Standard Method are 3,246 homes per year. For BCP Council the housing needs identified through the Standard Method are 2,980 homes per year.

17.5. The changes to national policy and an amended standard approach to calculating housing needs have significantly increased the housing needs in both the BCP area and Dorset. Total projected housing delivery is therefore likely to be considerably higher than earlier estimates, leading to an increase in demand for aggregate for built development in Dorset and BCP. However, the final and binding figures will not be known for some time yet, and there is time (via future Local Aggregates Assessments) to increase the agreed local annual supply, as referred to in Policy AS-1 of the Minerals Strategy 2014, to meet future increased demand.

17.6. When figures for housing completions are compared with annual sand and gravel sales (**Table 23**), there is no obvious corelation between the two. This steady decrease (shown in **Table 21**) suggests that for the coming year the ten year average of sales, for land-won sand and gravel and crushed rock, will once again be appropriate for the annual rate for the current Local Aggregates Assessment.

18. Other Potential Future Need for Aggregates

18.1. A number of projects are identified in the Strategic Economic Plan "Transforming Dorset" prepared by the Dorset Local Enterprise Partnership and the Implementation Plan 2 (2014 – 17) of the Bournemouth, Dorset and Poole Local Transport Plan 3. The Local Transport Plan is currently being updated, and specific implementation details are not known. Considering the broad distribution of future development, it is likely that the main focus will be in and around Poole and Bournemouth and the Dorchester-Weymouth corridor.

18.2. There are currently no particularly high-consumption of aggregates projects or major infrastructure proposals in the Dorset/BCP area and no proposed major infrastructure proposals identified at this time within Dorset in the National Infrastructure Plan. Various urban extensions are proposed but it is expected that the need for aggregate will be met from normal supply. The MPA considers that the ten year sales average figure for sand and gravel will be adequate to meet demand in the near future, and no increase or decrease is necessary.

19. Maintaining Supply

19.1. Minerals can only be worked where they are found and much of Dorset's environment is highly protected and under pressure from a range of other uses/constraints. Environmental designations (including international, national and local), landscape, heritage and other designations (e.g. the World Heritage Site) all restrict minerals development. Similarly, the water environment (including floodplains, Source Protection Zones, aquifers, groundwater depth and geology, Nutrient Neutrality requirements) can also restrict development. Minerals development has the potential to significantly affect settlements and tourism interests, although impacts should be mitigated if the development is properly located, designed and managed. However, the level of settlement and tourist interest in Dorset does have a limiting effect on minerals development.

19.2. The ability to deliver the levels of aggregate provision identified in the Minerals Strategy 2014, particularly regarding provision of land-won sand and gravel and crushed rock, has been tested through the preparation of the Mineral Sites Plan. An allocation of sand and gravel sites providing a nominally greater tonnage then will be needed over the life of the plan was tested through Examination and found sound by the Inspector. In order to respond to unforeseen rises in demand for sand and gravel and crushed rock, the 2014 Minerals Strategy will be subject to robust monitoring of all policies so that sales can be related to supply/demand and the effectiveness of the policies at delivering minerals for BDP and surrounding areas can be continuously assessed. The LAA will specifically monitor aggregates sales and landbanks. If monitoring indicates that Policy AS1 is failing to meet demand, this could trigger a review of the Minerals Strategy or the relevant parts of it.

20. Capacity and Constraints

20.1. Individual sites may have limits placed on their working by the planning permission under which they are worked. As with other aggregate sources, sales of sand and gravel are market driven, with increased demand leading to increased supply. In periods of lower economic growth and demand for construction, there will be less development of sand and gravel sites and lower production at such sites. The landscape and environmental sensitivity of Dorset, and to a lesser extent, Bournemouth and Poole, also set limits on the development of mineral sites. Policy AS1 of the 2014 Minerals Strategy notes that:

> *Sites will only be considered where it has been demonstrated that possible effects (including those related to hydrology, displacement of recreation, species, proximity, land management and restoration) that might arise from the development would not adversely affect the integrity of the Dorset Heaths SAC, Dorset Heathlands SPA and Dorset Heathland Ramsar site either alone or in combination with other plans or projects.*

20.2. Ecological, heritage and landscape constraints could act to limit production. A lack of landowners willing to release their land for aggregates development could also be a constraint. In such a case there would need to be a reassessment of the provision for sand and gravel sales but it is not expected that these issues will threaten sales in the near future.

21. Final Comment

21.1. It is considered that all sources of aggregate demonstrate capacity for some increase in supply, should demand increase, and no sharp increases in demand are expected in the next year. In the longer term, there are adequate landbanks for sand and gravel and crushed rock provided new permissions are granted. The Mineral Sites Plan identifies adequate new sites to maintain production and sales. If for some reason it proves impossible to maintain supply, the strategy for mineral provision will have to be re-visited.

21.2. It is therefore considered that it is appropriate to continue to use the 10 year average figure, as set out in this Local Aggregates Assessment, to establish the size of the landbank and level of provision for both sand and gravel and crushed rock.

Appendix

A.1. **Tables 24 to 29** below show the various aggregate producing/handling facilities in Bournemouth, Dorset and Poole, both active and inactive, in 2024.

Table 24 - Land Won Sand and Gravel Quarries – operational in 2024 (see Figure 2 for locations)

MPA	Quarry	Site Operator	Mineral
Dorset Council	Masters Pit - North and South	Holme Sand and Ballast	Sand, some gravel
Dorset Council	Dorey's Pit	Ball Clay site – worked by Imerys[17]	Sand
Dorset Council	Binnegar Quarry	Raymond Brown	Sand
Dorset Council	Henbury Quarry	M B Wilkes	Sand
Dorset Council	Woodsford Quarry	Hills Aggregates	Sand and Gravel
Dorset Council	Hyde Pit	Hanson Aggregate	Sand
Dorset Council	Redman's Sand Quarry	Redman's Sand Quarries	Sand
BCP Council	Hurn Court Farm	New Milton Sand and Ballast	Sand and Gravel

[17] Aggregate output from Dorey's is taken to Masters Pit (Holme Sand and Ballast) and processed there.

Table 25 - Land Won Sand and Gravel Quarries – permitted but inactive in 2024

MPA	Quarry	Site Operator	Mineral Type
Dorset Council	Avon Common	Tarmac	Sand and Gravel
Dorset Council	Tatchell's Quarry (No production 2023)	Aggregate Industries	Sand
Dorset Council	Trigon Pit (no production 2023)	Ball Clay site – worked by Imerys	Primarily Sand, some Gravel – extracted with the ball clay
Dorset Council	Hines Pit (no production 2023)	Hanson Aggregate	Sand
Dorset Council	Redbridge Road Quarry	G Crook and Sons	Sand
Dorset Council	Chard Junction Quarry (in restoration)	Aggregate Industries	Sand and Gravel

Table 26 - Crushed Rock Quarries – operational in 2024

MPA	Quarry	Site Operator	Mineral Type
Dorset Council	Swanworth Quarry	Suttle Quarries	Crushed Rock, some dimension stone
Dorset Council	Inmosthay Quarry	Crook and Sons	Crushed rock (offcuts etc)
Dorset Council	Perryfield Quarry	Portland Stone Ltd	Crushed rock (offcuts etc)
Dorset Council	Coombefield	Portland Stone Ltd	Crushed rock (offcuts etc)

Table 27 - Aggregate Wharf

MPA	Site	Site Operator	Mineral Handled/Produced
BCP Council	CEMEX Aggregates Wharf	CEMEX	Marine Dredged sand and gravel

Table 28 - Aggregate Rail Depots (both currently inactive)

MPA	Site	Site Operator	Mineral Handled/Produced
BCP Council	Dawkins Road Rail Depot, Hamworthy, Poole [18]	Hanson	Crushed Mendip limestone
Dorset Council	Wool Sidings, Wool [19]	Network Rail	Historically, sand from Warmwell Quarry (now closed)

[18] Site not operational in 2024.
[19] Site not operational in 2024.

Table 29 - Fixed Recycled Aggregate Facilities – operational in 2024

MPA	Site	Site Operator
BCP Council	Canford Recycled Aggregates Site	Avon Material Supplies Ltd.
BCP Council	Parley Composting and Parley Road Sweepings, Chapel Lane, Parley, Christchurch	Eco-Sustainable Solutions
BCP Council	Manning's Heath Depot, Manning's Heath	J Suttle Transport
Dorset Council	Downend Farm, Blandford Forum	Mark Farwell Plant Hire Ltd
Dorset Council	Henbury Quarry, Wimborne	M B Wilkes Ltd
Dorset Council	Redbridge Road Quarry, Moreton	G Crook & Sons
Dorset Council	Masters Quarry, Puddletown Road	New Milton Sand & Ballast
Dorset Council	Spratley Wood, Puddletown Road	Mr P Andrews
Dorset Council	Henbury Allasso Road Planings Facility, Wimborne	Allasso Recycling
Dorset Council	Swanworth Quarry, Purbeck	J Suttle Transport Ltd
Dorset Council	Broadcroft Quarry, Portland	Portland Stone Ltd

MPA	Site	Site Operator
Dorset Council	Hines Pit, Puddletown Road	The Waste Group Ltd.
Dorset Council	Victoria Avenue, Swanage	The Waste Group Ltd.