

# Local Aggregate Assessment 2023

**Covering Data from the Calendar Year of 2023**

**Hertfordshire County Council**



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# Executive Summary

Hertfordshire County Council, as the Mineral Planning Authority for the area, has a duty under the National Planning Policy Framework (NPPF) to produce a Local Aggregate Assessment (LAA) on an annual basis and to participate in the operation of an Aggregate Working Party, whose advice must be taken into account when preparing the LAA.

The Council is part of the East of England Aggregate Working Party (EoEAWP), whose advice has been taken into account in the preparation of this LAA. This LAA was prepared in 2024 and covers data from the **calendar year 2023**.

The LAA contributes towards the evidence base for the emerging Hertfordshire Minerals and Waste Local Plan. Its primary purpose is to set out the current level of aggregate supply and demand for Hertfordshire and to calculate the current landbank of sand and gravel.

The 2023 total sales of sand and gravel stand at **0.78Mt** (million tonnes). A decrease of approximately 0.24Mt when compared to the previous year's figure of 1.02Mt.

Throughout the calendar year of 2023, one planning application for sand and gravel extraction at Land adjoining Coopers Green Lane was approved, meaning that 3.52Mt of additional reserves have been added to Hertfordshire's landbank. The landbank of sand and gravel as of the end of 2023 stands at **7.4 years**.

The emerging Minerals and Waste Local Plan will ensure mechanisms are in place to support the future supply of sand and gravel.

## 2023 Headline Figures

	Performance in 2023	Comparison with 2021
Land won sand and gravel sales (Mt)	0.78	↓0.24
Permitted reserves of sand and gravel at end of year (Mt)	8.34	↑2.63
Landbank based on LAA Rate (years)	7.4	↑2.5
Landbank based on 10-year sales average (years)	7.4	↑2.5
Landbank based on 3-year sales average (years)	8.5	↑3.3
Number of Allocated Sites remaining (in current adopted Minerals Local Plan) with unpermitted reserves	2	2
Remaining potential yield (Mt) from Preferred Areas (approximate)	14	14
Rail depot imports of crushed rock (Mt)	0.69	↓0.05

# 1. Introduction

- 1.1 Minerals such as sand & gravel, crushed rock, chalk and clay all provide the construction industry with the raw materials required for constructing and maintaining the built environment. Minerals are also essential elements in the production of a variety of other products, such as everyday items like glass, medicine, and food.
- 1.2 An adequate and steady supply of minerals is essential if current standards of living are to be maintained in society, as well as meeting basic needs for quality of life, such as shelter.
- 1.3 The National Planning Policy Framework (NPPF) recognises the importance of minerals and sets out the requirement for minerals planning authorities to produce a Local Aggregates Assessment (LAA) on an annual basis.
- 1.4 Paragraph 226a of the NPPF (12 December 2024) states that Minerals planning authorities should plan for a steady and adequate supply of aggregates by:

*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 other supply options (including marine dredged, secondary and recycled sources)'*

- 1.5 This LAA has been prepared to fulfil the requirements of the NPPF and has also been prepared in line with Planning Practice Guidance (PPG) and the Planning Officers Society and Mineral Products Association (POS/MPA) Practice Guidance on the production and use of LAAs Living Document (May 2017)<sup>1</sup>.

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<sup>1</sup> <https://www.planningofficers.org.uk/publications/good-practice-publication/good-practice-production-and-use-of-local-aggregate-assessments>  
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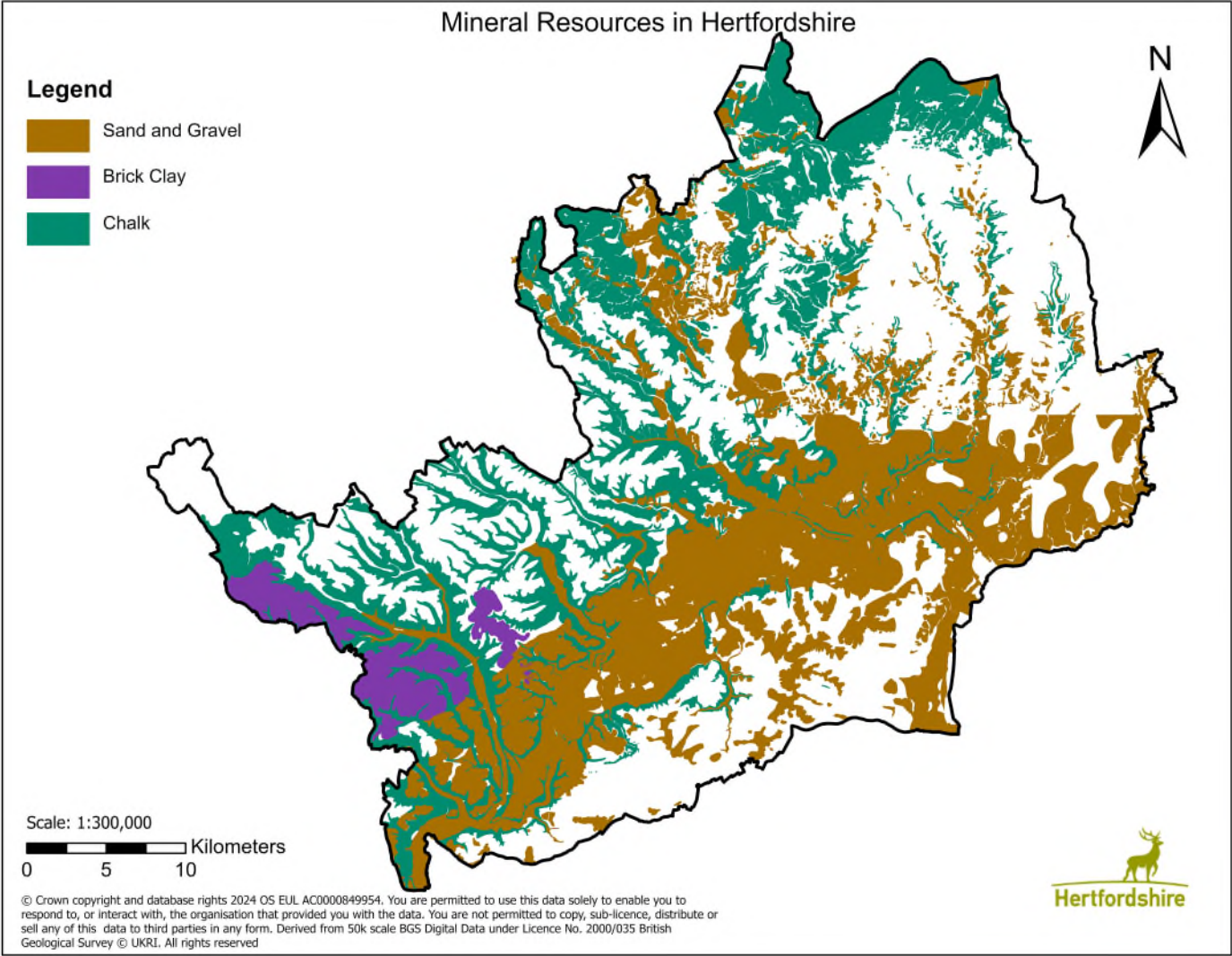
## 2. Mineral Resources

- 2.1 The main naturally occurring mineral resources in Hertfordshire include sand and gravel with smaller deposits of chalk and brick clay (as shown in Figure 1 below). Sand and gravel are the predominant minerals worked in the county. No brick clay extraction currently takes place. Chalk has been extracted only on a small scale, for use as an agricultural lime and is classed as an industrial mineral rather than an aggregate used in construction.
- 2.2 Hertfordshire has no indigenous reserves of crushed rock (limestone) and is therefore entirely reliant on imports of this mineral through the Hertfordshire Rail Aggregate Depots (see Appendix 3) as well as by road, to meet the county's demands for this type of mineral.
- 2.3 Sand and gravel resources occur in Hertfordshire within superficial or 'drift' deposits and are subdivided into a number of categories including fluvioglacial, glacial, river terrace and sub-alluvial deposits<sup>2</sup>.
- 2.4 Deposits of sand and gravel are found in most parts of the county although they are concentrated in an area south of a line between Bishops Stortford in the east and Hemel Hempstead in the west (often referred to as the sand and gravel belt).
- 2.5 Sand and gravel from Hertfordshire is mostly used by the construction industry. Most sand extracted in Hertfordshire is sharp sand and is suitable for making concrete when mixed with various selections of gravel sizes, cement, and water. Building sand, also known as soft sand, is less commonly found in the county, and is mostly imported.

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<sup>2</sup> BGS & ODPM, 2003, Technical report CR/03/075/N Mineral Resource Information in support of National, Regional and Local Planning: Hertfordshire and Northwest London Boroughs

Figure 1: Main Naturally Occurring Minerals in Hertfordshire





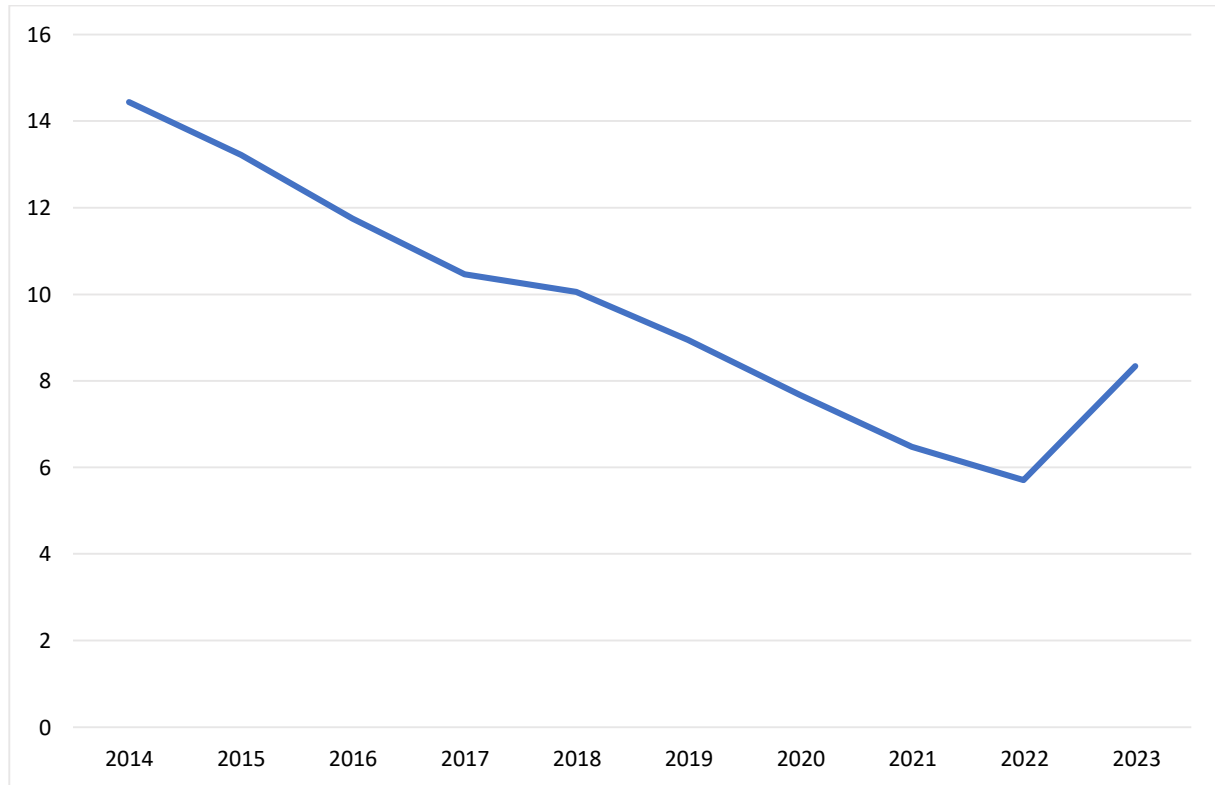
### 3. Sand and Gravel Reserves

- 3.1 The term 'permitted sand and gravel reserves' refers to the supply of sand and gravel which has planning permission to be extracted. There are seven permitted sand and gravel quarries in Hertfordshire as of the end of 2023. Of these seven sites, four have remaining permitted reserves of sand and gravel. The four sites are Tyttenhanger Quarry, Hatfield Quarry, Land adjoining Coopers Green Lane and Thorley Hall Farm.
- 3.2 The remaining three sites are no longer extracting sand and gravel and are in the process of infill and/or restoration. See Appendix 1: Sand and Gravel Sites for further details about the sand and gravel sites in Hertfordshire.
- 3.3 At the end of 2023 the total permitted reserves figure stood at 8.34Mt. The reserves have increased by approximately 2.63Mt when compared to last year's reserves figure (5.71Mt),<sup>3</sup>.
- 3.4 A breakdown of the Hertfordshire permitted reserves over the 10-year period from 2014 to 2023 can be seen in Figure 2 below. Permitted reserves decline as sites are worked and material is supplied to the market. However, reserves figures are boosted periodically through the approval of planning applications for sand and gravel extraction. For example, the approval of Land adjoining Coopers Green Lane (an extension to the existing Hatfield Quarry) in December 2023 for 3.52Mt meant that the reserve figure at the end of 2023 increased in comparison to that at the end of 2022.

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<sup>3</sup> Mineral Operators provide information to the council each year through the Annual Aggregate Monitoring Surveys. This year the British Geological Survey (BGS) conducted the 2023 National Aggregate Minerals Survey.

**Figure 2: Permitted Reserves of Sand and Gravel (Mt)**



3.5 Hertfordshire's permitted reserves of sand and gravel were steadily decreasing between 2014 and 2022. The approval of Land adjoining Coopers Green Lane has helped to address this shortfall and reverse the trend. One way to help address a potential shortfall in reserves in the future is to allocate suitable sites for future extraction through the Minerals and Waste Local Plan. Applications for minerals extraction may then come forward on these sites to maintain supply accordingly<sup>4</sup>.

**Supply from the Preferred Areas within the Adopted Minerals Local Plan 2007**

3.6 The adopted Minerals Local Plan (2007) identifies three Preferred Areas with the intention that they would supply the county with enough sand and gravel resources over the period that it covers (2002-2016). The three Preferred Areas in the adopted Minerals Local Plan are:

- Preferred Area 1 – BAE (Hatfield Aerodrome)
- Preferred Area 2 – Rickneys; &
- Preferred Area 3 – Coursers Road (Tyttenhanger)

3.7 There are still potentially workable reserves remaining at two of the three Preferred Areas. Details of the three Preferred Areas and their planning status are provided below.

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<sup>4</sup> Minerals Policy 4 of the Hertfordshire Minerals Local Plan Review 2002-2016 (2007)  
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## **Preferred Area 1 - BAE**

### Land at Hatfield Aerodrome

- 3.8 An application for the extraction of up to 8Mt of sand and gravel on Land at Hatfield Aerodrome (planning reference number 5/0394-16) was refused at Development Control Committee on 24 September 2020 against Officer recommendation<sup>5</sup>.
- 3.9 On 30 June 2021, Brett Aggregates Limited submitted an appeal to the Secretary of State against that decision (appeal reference APP/M1900/W/21/3278097). The appeal was determined on the basis of a Public Inquiry which took place from 16 November 2021 to 06 December 2021. On 25 January 2022, the appeal was dismissed<sup>6</sup>.
- 3.10 On 3 September 2021, the council received a revised planning application (planning reference number PL/0232/21) from Brett Aggregates Limited for the extraction of up to 8Mt of sand and gravel on the same site. On 31 October 2023 that application was refused at Development Control Committee, again against Officer recommendation<sup>7</sup>.
- 3.11 On 6 June 2024 Brett Aggregates Limited submitted an appeal to the Secretary of State against that decision (appeal reference APP/M1900/W/24/334/6607). The appeal will be determined by way of a Public Inquiry which will take place from 19 November 2024. The outcome of the appeal will be reported in next year's LAA.
- 3.12 Preferred Area 1 has a remaining potential yield of up to 8Mt of sand and gravel.

## **Preferred Area 2 – Rickneys**

### Land at Ware Park (also known as Bengo Quarry)

- 3.13 Two planning applications were submitted on Land at Ware Park, which is comprised of the southern part of Preferred Area 2 and adjoins the mothballed Rickneys Quarry. Both applications were refused at Development Control Committee on separate occasions.
- 3.14 The applicant appealed the decision on the first application (2.6Mt<sup>8</sup>) and a Public Inquiry was held for three weeks in May 2018 and for a further three days in October 2018. The Secretary of State issued a decision on 4 April 2019 which dismissed the appeal.

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<sup>5</sup> To read the report presented to the Development Control Committee on 24 September 2020, go to: <https://democracy.hertfordshire.gov.uk/ieListDocuments.aspx?CId=157&MId=1950>

<sup>6</sup> To read the appeal decision search on the council's planning webpages (<https://planning.hertfordshire.gov.uk/>) using planning reference number 5/0394-16.

<sup>7</sup> To view the committee papers, follow this link:

<https://democracy.hertfordshire.gov.uk/ieListDocuments.aspx?CId=157&MId=5243>

<sup>8</sup> The applicant amended the extraction limit of this application from 2.6Mt to 1.75Mt.

3.15 Preferred Area 2 has a remaining potential yield of 5-6Mt of sand and gravel.

### **Preferred Area 3 – Coursers Road**

3.16 Preferred Area 3 is being worked as an extension to Tyttenhanger Quarry. The application for an eastern extension to the existing quarry (south of Coursers Road) was permitted on 23 February 2011.

### **Potential Future Supply from Mineral Allocation Sites within the emerging Minerals and Waste Local Plan**

3.17 The council has identified three Mineral Allocation Sites (MAS) within the emerging Minerals and Waste Local Plan (the Plan), which is currently at Draft Plan stage<sup>9</sup>. Once the Plan is adopted it will replace the current adopted Minerals and Waste Local Plan documents<sup>10</sup>.

#### **MAS01: The Briggens Estate**

3.18 MAS01: The Briggens Estate has a workable reserve of up to 8.8Mt of sand and gravel. The site has not been subject to any planning applications for sand and gravel extraction.

#### **MAS02: Hatfield Aerodrome**

3.19 See paragraphs 3.8 to 3.12 above.

#### **MAS03: Land Adjoining Coopers Green Lane**

3.20 On 22 October 2020, a planning application for the extraction of 3.52Mt of sand gravel at Land adjoining Coopers Green Lane, Hatfield Quarry (planning reference number PL\0963\18) was presented to the council's Development Control Committee and was recommended approval, subject to the signing of a Section 106 Legal Agreement (S106). The Decision Notice was issued in December 2023 and the site now has planning permission and has been added to the overall reserves.

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<sup>9</sup> The Draft Minerals and Waste Local Plan is available to view at [www.hertfordshire.gov.uk/mwlp](http://www.hertfordshire.gov.uk/mwlp)

<sup>10</sup> The current adopted Minerals and Waste Local Plan documents can be viewed via the following link: <https://www.hertfordshire.gov.uk/services/recycling-waste-and-environment/planning-in-hertfordshire/minerals-and-waste-planning/minerals-and-waste-planning.aspx>

## 4. Forecasting the Annual Rate of Future Demand

- 4.1 The LAA Rate is a figure (in Mtpa) used in the calculation of the sand and gravel landbank. The LAA Rate represents the annual rate of future demand for sand and gravel and is based on the most up to date information available. The LAA Rate is not a fixed figure and is reviewed each year through the LAA.
- 4.2 The landbank figure represents the number of years the permitted reserves of sand and gravel will last for. It is calculated by dividing the permitted reserves by the LAA Rate. For more information on the landbank see Chapter 5.
- 4.3 The 2023 LAA Rate has been set at 1.13Mtpa and is based on the 10-year sales average figure. This chapter sets out the information considered in setting the LAA Rate. The information considered is consistent with the requirements of paragraph 226a of the NPPF, which states that minerals planning authorities should plan for a steady and adequate supply of aggregates by:

*'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 other supply options (including marine dredged, secondary and recycled sources)'*

- 4.4 Paragraph 226d of the NPPF also states that minerals planning authorities should take account of any published National and Sub National Guidelines on future provision when planning for future demand.
- 4.5 Planning Practice Guidance (PPG) states that the 2009 National and Regional Guidelines for Aggregates Provision in England are not to be interpreted as rigid standards<sup>11</sup> and that minerals planning authorities may decide, collectively, to plan for more or less than set out in the Guidelines based on their Local Aggregate Assessment<sup>12</sup>. The Guidelines however only covered the period from 2005-2020 and therefore no longer provide an accurate basis upon which to inform future aggregate demand.
- 4.6 The Practice Guidance on the Production and use of Local Aggregate Assessment Living Document (May 2017) states that minerals planning authorities should consider the indicators of potential future growth in demand for aggregates in order to make a qualitative forecast in the LAA to, if necessary, clearly indicate whether demand is considered likely to be above the prevailing 10-year average. The document states that there will need to be sufficiently robust information to justify deviation from the starting point of the 10 years rolling sales average (as required by

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<sup>11</sup> Paragraph: 068 Reference ID: 27-068-20140306

<sup>12</sup> Paragraph: 070 Reference ID: 27-070-20140306

the NPPF).

## **Sales Data**

### **Total Sales**

- 4.7 The 2023 total sand and gravel sales figure stands at 0.78Mt; a decrease of approximately 0.24Mt when compared to last year's total sales figure of 1.02Mt.
- 4.8 After a drop in sales in 2016 (to 1.16Mt), sales of sand and gravel saw a gradual increase over the period to 2019, indicating that demand was slowly increasing. In 2019, the total sales of sand and gravel stood at 1.25Mt. The highest figure recorded since 2011 (1.27Mt).
- 4.9 In 2020, sales of sand and gravel dropped to their lowest (1.12Mt) since 2012. It is thought that the drop in sales in 2020 reflected the temporary slowdown and shut down in the construction sector because of the coronavirus pandemic.
- 4.10 In 2021 the sales figure marginally increased up to 1.15Mt. The Mineral Products Association (MPA) reported that at the end of 2021, construction activity increased back up above pre-pandemic levels and that as a result, construction demand for aggregates and mineral products saw double-digit growth during 2021 (in Great Britain)<sup>13</sup>.
- 4.11 Whilst there was an increase in construction activity, this was not necessarily reflected in the 2021 total sales figure. This could be partially explained by the fact that the recovery in ready-mixed concrete demand in 2021 was held back by a weaker recovery in new commercial tower projects which had a subsequent drag on recovery in demand for sand & gravel, the majority of which is used in the manufacture of concrete<sup>14</sup>. A range of other factors likely had a part to play in the lowered demand for sand and gravel reported for 2021, such as supply chain bottlenecks, labour and raw material shortages and soaring energy prices.
- 4.12 The 2023 sales figure (0.78Mt) is the lowest figure on record over the last 23 years (since 2001). This may be explained by economic factors, such as an increase in costs due to inflation and a rise in interest rates. This is in line with 18.4% decrease in Sand & Gravel sales volumes between 2022 and 2023 in the East of England as reported by the MPA<sup>15</sup>.
- 4.13 The MPA has reported that the output in the construction sector grew by 2.1% in

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<sup>13</sup> Mineral Products Association, Regional Overview and Forecasts of Construction and Mineral Products Markets in Great Britain Spring 2022

<sup>14</sup> Mineral Products Association, Aggregate Supply and Demand in Great Britain: Scenarios for 2035

<sup>15</sup> Regional overview of construction and mineral products markets in Great Britain 2024 edition (2024)

2023. While this is a slight increase, output has suffered due to an almost 12% reduction in the demand for new housing following an increase in interest rates in 2023<sup>16</sup>.

- 4.14 In 2023, a decrease in the sales of aggregates may be linked to an 11.9% drop in new housing output, which the MPA believes accounts for over a fifth of aggregates demand<sup>17</sup>.
- 4.15 Through 2023, infrastructure work remained resilient (dependant on location) and is supported by projects in the regulated sectors (water, rail and roads) and projects such as High Speed 2 and Hinkley Point C. However, there are concerns over poor delivery of key infrastructure schemes which is giving rise to uncertainty across future demand for minerals<sup>18</sup>.
- 4.16 The Construction Products Association (CPA) forecasted that total construction output will fall by 2.9% in 2024 before a recovery of 2.0% in 2025. The recent downgrade in the forecasts is primarily due to recovery in the two largest construction sectors, private housing new build and repair, maintenance and improvement (RM&I), being pushed back<sup>19</sup>.
- 4.17 In addition, the value of new construction contracts awarded in 2023 was down by 14% in comparison to 2022 (Barbour ABI, 2024). This could signal a weak pipeline of future construction work and like the CPA, the MPA does not forecast a gradual recovery in minerals sales until 2025.
- 4.18 The MPA predicts a decline in the sales volumes for minerals products for the third consecutive year in 2024 which may be reflected in next year's total sales figure (which will cover the calendar year of 2024). However, both the MPA and CPA are predicting a slight upturn in minerals sales in 2025.
- 4.19 It should be noted that, whilst the new Labour Government has ambitious housebuilding and associated infrastructure targets over the term of this parliament, evidenced by the recent revisions to calculating housing need in the revised NPPF (12 December 2024), this should be treated with caution when forecasting future aggregate mineral demand. Analysis by the Centre for Cities suggests that Labour will miss its 1.5m housebuilding target by 338,000 homes (around 23%<sup>20</sup>). Other analysts also suggest that housebuilding in the UK is in decline, owing to increased

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<sup>16</sup> Regional overview of construction and mineral products markets in Great Britain 2024 edition (2024)

<sup>17</sup> Regional overview of construction and mineral products markets in Great Britain 2024 edition (2024)

<sup>18</sup> Regional overview of construction and mineral products markets in Great Britain 2024 edition (2024)

<sup>19</sup> <https://www.constructionproducts.org.uk/publications/economics/construction-industry-forecasts/construction-industry-forecasts-summer-2024/>

<sup>20</sup> <https://inews.co.uk/news/labour-miss-housebuilding-pledge-388000-homes-3409910>

borrowing costs and weak consumer confidence<sup>21</sup>. Therefore whilst the revised National Planning Policy Framework seeks higher housing delivery targets for Local Planning Authorities, industry forecasts do not currently reflect these Government ambitions. The Council will closely monitor this situation through future LAAs.

#### 10-year Sales Average

4.20 The 2023 the 10-year sales average figure stood at 1.13Mt. As a comparison, this figure was 1.16Mt at the end of 2022 and 1.17Mt at the end of 2021.

4.21 The 2023 10-year sales average figure is used as the starting point to forecast future demand (i.e., to set the LAA Rate).

#### 3-year Sales Average

4.22 In addition to looking at sales figures across the most recent 10-year period, it is also necessary to assess trends in more recent years, as these could help to predict a more accurate rate of future demand that better reflects current circumstances.

4.23 The PPG states:

*'Mineral Planning Authorities should also look at average sales over the last 3 years in particular to identify the general trend of demand as part of the consideration of whether it might be appropriate to increase supply<sup>22</sup>.'*

4.24 The average sales of sand and gravel in Hertfordshire over the 3-year period from 2021-2023 stands at 0.98Mt. This figure was 1.10Mt at the end of 2022 and 1.17Mt at the end of 2021. The drop in the 3-year sales average figure reflects the sharper drop in the total sales figure this year.

4.25 The total annual sales figures and the 10 and 3-year sales average figures over the period from 2014 to 2023 are shown in Figure 3 below. The figures are based on actual sales data from the county's annual Aggregate Monitoring Surveys and the British Geological Survey (BGS) Aggregate Minerals Survey 2019 for England and Wales.

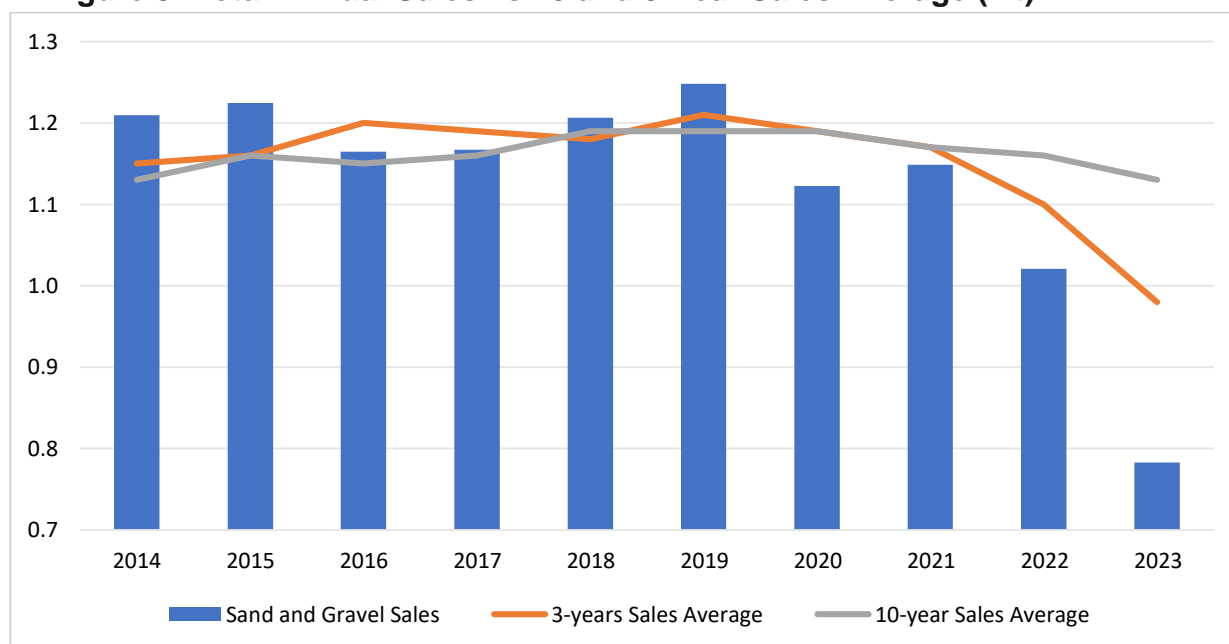
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<sup>21</sup> <https://www.thisismoney.co.uk/money/markets/article-14160793/Housebuilding-decline-high-borrowing-costs-hit-demand.html>

<sup>22</sup> PPG Paragraph: 064 Reference ID: 27-064-20140306



**Figure 3: Total Annual Sales vs 10 and 3-Year Sales Average (Mt)**



## Other Supply Options

### Imports and Exports of Sand and Gravel

- 4.26 Some of Hertfordshire’s demand for sand and gravel is met through imports from both land won and marine sand and gravel.
- 4.27 The national four-yearly Aggregate Minerals Survey (AMS) provides in–depth information of regional and national sales, inter–regional flows, transportation, consumption and permitted reserves of primary aggregates in England and Wales.
- 4.28 Conducted by MHCLG<sup>23</sup> and the British Geological Survey (BGS), the latest published survey was carried out in 2020 to capture data for 2019. The figures from the 2019 National AMS are set out in Table 1 below against the figures reported through the 2014 National AMS<sup>24</sup>.

**Table 1: 2019 AMS data vs 2014 AMS data**

	<b>2019 Data (tonnes)</b>	<b>2014 Data (tonnes)</b>	<b>Difference (tonnes)</b>
Imports of land won sand and gravel	222,000	434,000	↓ 212,000

<sup>23</sup> Ministry of Housing, Communities and Local Government (formerly the Department for Communities and Local Government and the Department for Levelling Up, Housing & Communities)

<sup>24</sup> For a further breakdown on the 2019 figures including where the imports were received from please refer to the 2021 LAA, which can be found on the council’s minerals and waste planning webpages at: <https://www.hertfordshire.gov.uk/services/recycling-waste-and-environment/planning-in-hertfordshire/minerals-and-waste-planning/minerals-and-waste-planning.aspx>

Imports of marine sand and gravel	216,000	19,000	↑ 197,000
Imports of crushed rock	729,000	591,000	↑ 138,000
Exports of land won sand and gravel	324,483 <sup>25</sup>	520,099 <sup>26</sup>	↓ 195,616
Consumption of land won sand and gravel	1,148,000	1,126,000	↑ 22,000
Consumption of marine sand and gravel	216,000	19,000	↑ 197,000
Consumption of crushed rock	729,000	591,000	↑ 138,000
Total Consumption for all sand and gravel (marine + land won)	1,364,000	1,146,000	↑ 218,000
Total Consumption for Primary Aggregates (marine + land won + crushed rock)	2,093,000	1,737,000	↑ 356,000

4.29 In 2019, Hertfordshire received 438,000 tonnes of imported sand and gravel and in total consumed<sup>27</sup> 1,364,000 tonnes of sand and gravel.

4.30 Data on imports and exports are limited by the fact that it is only collected every 4 years and only covers data for the year prior to collection.

4.31 Whilst the county does consume some imported sand and gravel, it is important to also consider the quantity of sand and gravel that is exported out of Hertfordshire. The 2019 National AMS reports that 324,483 tonnes of sand and gravel was exported out of county. This equated to approximately 26% of Hertfordshire's total sand and gravel sales for 2019 (1.25Mt).

4.32 When comparing the 2019 imports figure (438,000 tonnes) against the 2019 exports figure (324,483 tonnes), it is found that overall, the county was a net importer of sand and gravel.

4.33 The next National AMS took place in early 2024 and collected data for 2023. Next year's LAA will report the results of the National AMS (as the data were not available at the time of writing).

<sup>25</sup> Approximately 26% of Hertfordshire's total sand and gravel sales (1,248,011) were exported out of county in 2019

<sup>26</sup> 43% of Hertfordshire's total sand and gravel sales (1,209,532) were exported out of county in 2014

<sup>27</sup> Consumption is an overall figure combining imports from external sources as well as the supply consumed from in-county sources

## Secondary and Recycled Aggregates

4.34 Definitions of secondary and recycled aggregates can be seen below.

**Secondary aggregates** are by-products of other industrial processes. Examples of secondary aggregates include blast furnace iron and steel slags, incinerator bottom ash, slate, and chalk waste. Depending on their quality and composition, and subject to customer specification, secondary aggregates can be used as replacement construction aggregates, in the manufacture of concrete products and a range of other construction applications.

**Recycled aggregates** are materials derived from construction, demolition and excavation wastes (CD&E) which can be reprocessed and/or re-used as an aggregate for construction purposes whenever possible. This includes crushed concrete, stone and brick, asphalt road planings and railway ballast.

4.35 CD&E waste represents the largest waste stream in the UK economy<sup>28</sup>. The “hard” element of CD&E waste (i.e., construction and demolition wastes) can include materials such as concrete, bricks, tiles and ceramics, and metal. The extent to which CD&E waste can be recycled or recovered, is determined by the individual constituents of which it is comprised.

4.36 The MPA reports that recycled and secondary materials accounted for 30% of total aggregates supply in Great Britain in 2022 and that Great Britain is in a leading position internationally in the use of recycled and secondary aggregates<sup>29</sup>.

4.37 With its obvious benefits, the use of secondary and recycled aggregates is encouraged. Due to the high levels of growth planned for in Hertfordshire and the volumes of waste coming in from London, Hertfordshire will have a significant proportion of CD&E waste that needs to be managed.

4.38 Recycling of CD&E waste can allow for its re-use within construction projects. The recycling of CD&E waste occurs both directly where it originates (on construction sites) or off-site at fixed processing sites. Details of the fixed processing facilities can be seen in Appendix 2: Aggregate Recycling Facilities.

4.39 Recycling of CD&E waste at aggregate recycling facilities generally involves a combination of crushing, mechanical screening and washing operations to reprocess the materials for re-use.

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<sup>28</sup> Mineral Products Association, From Waste to Resource, a UK Mineral Products Industry Success Story (2019)

<sup>29</sup> <https://www.mineralproducts.org/News/2024/release09.aspx>

4.40 Table 2 below provides an overview of the secondary and recycled aggregate figures over the 10-year period from 2014 to 2023.

**Table 2: Total recycled and secondary aggregate processed over the last 10 years**

<b>Year</b>	<b>Recycled and Secondary Aggregate Processing (tonnes)</b>
<b>2014</b>	362,203
<b>2015</b>	317,314
<b>2016</b>	234,783
<b>2017</b>	246,105
<b>2018</b>	272,656
<b>2019</b>	237,792
<b>2020</b>	236,069
<b>2021</b>	315,000
<b>2022</b>	311,000
<b>2023</b>	377,397

4.41 Survey data was used from 2017 – 2020 to find the figure of recycled and secondary Aggregate. Since 2021, the council relies on the Environment Agency’s Waste Data Interrogator (WDI) for its total recycled aggregate processing figure. In addition, an 80/20 split is assumed where the WDI figure is assumed to be 80% of the actual total of recycled material to take account of material which is being reused and recycled directly on construction sites.

4.42 This year’s (2023) total recycled aggregate processing figure stands at 377,397 tonnes.

4.43 The council is unable to monitor the reuse and recycling of inert CD&E waste by mobile plant on construction sites and receives very limited information through Site Waste Management Plans. The council can however get a relatively accurate picture of CD&E recycling through fixed plant, as reported each year through the WDI.

4.44 According to a study undertaken by Capita Symonds in 2005<sup>30</sup>, of the total secondary and recycled material used in any given year, approximately 80% is derived from fixed processing sites and 20% is from mobile plants at construction sites. Knowing the figure of fixed plant from the WDI, we can therefore multiply this by 1.25 to get a total figure which includes mobile plant (shown in Table 2 above).

<sup>30</sup> PDF of Capita Symonds report available at: <https://go.walsall.gov.uk/sites/default/files/2022-09/Survey%20of%20Arising%20and%20Use%20of%20Alternatives%20to%20Primary%20Aggregates%20in%20England%2C%202005%20Construction%2C%20Demolition%20and%20Excavation%20Waste%20%28February%202007%29%20DCLG.pdf>  
Page | 15

- 4.45 Whilst the study undertaken by Capita Symonds is clearly dated, the council does not have a more up to date study, nor methodology, upon which to base an assumption. In addition, certain facilities that process waste materials for recycled aggregate do not require an environmental permit and therefore will not report data to the Environment Agency and that data will not be included in the WDI. The figures therefore should be treated with caution.
- 4.46 Generally, it is assumed that all CD&E waste which can be recycled as aggregates is being used, with little scope for a much higher contribution of this waste towards the aggregates market. Research by DCLG<sup>31</sup> into CD&E waste markets suggests that this was already the case in 2005, indicating that very little evidence was found of hard C&D waste being landfilled where it could be recycled into aggregate<sup>32</sup>.
- 4.47 As noted in Paragraph 4.36, the MPA estimate that nationally, recycled and secondary aggregates materials account for 30% of aggregate supply. It is anticipated that the contribution made by recycled and secondary aggregates will remain at this level at least in the short to medium term. Whilst secondary and recycled aggregates are contributing towards supply and reducing demand for primary material, a continued supply of primary aggregates will continue to be necessary to meet overall demand.
- 4.48 The use of secondary and recycled materials will go some way in meeting Hertfordshire's demands for aggregate, but it is not possible to determine its exact contribution due to limited data. Whilst the MPA report that the contribution made by secondary and recycled aggregates towards overall demand in Great Britain will likely remain at a rate of approximately 30%, this does not mean that an increase in the use of secondary and recycled aggregate cannot be encouraged at a local level.
- 4.49 The emerging Minerals and Waste Local Plan includes policies that encourage an increased use of secondary and recycled aggregates. Policy 10: Secondary and Recycled Materials aims to maximise the re-use, recycling and recovery of CD&E waste to minimise its disposal wherever possible and to ensure that this is achieved through the most appropriate means. It also supports the expansion of existing and the provision of new facilities to increase the capacity for processing, distribution and where necessary the re-processing of aggregates.
- 4.50 Policy 11: Sustainable Design and Resource Efficiency will also require all major planning applications to be accompanied by a Circular Economy Statement which includes details of the management of waste through all stages of development. This aims to encourage and increase the reuse and recycling of CD&E waste on site

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<sup>31</sup> Research conducted by Department for Communities and Local Government (now called the Ministry for Housing, Communities and Local Government)

<sup>32</sup> Mineral Products Association, The Contribution of Recycled and Secondary Materials to Total Aggregates Supply in Great Britain – 2020 Estimates (2022)

as well as encourage the use of secondary and recycled aggregates over primary aggregate.

4.51 It is hoped that over time Circular Economy Statements will help to build a clearer picture on how much CD&E waste is recycled and re-used on construction sites in the county<sup>33</sup>.

### Crushed Rock

4.52 Hertfordshire does not plan for crushed rock because it does not have any naturally occurring resources. The county is reliant on imports and safeguards the rail aggregate depots through adopted Minerals Local Plan Policy 10: Railheads and Wharves.

4.53 Crushed rock has a wide range of uses. However, its main use is in road construction, primarily for the foundations. It is bound with either bitumen (to produce 'coated roadstone') or cement in the upper layers<sup>34</sup>.

4.54 Of the total aggregates consumed within Great Britain, crushed rock accounts for the largest proportion of the total sales. Of the total aggregates sales in Great Britain in 2018, the total amount of crushed rock sold was 117.3Mt<sup>35</sup>, whereas total sand and gravel sales stood at 62.6Mt<sup>36</sup>. As of 2022, there were 259 active crushed rock quarries within Great Britain, with the number of active sand and gravel quarries only slightly higher, at 261<sup>37</sup>.

4.55 Hertfordshire relies on imports of crushed rock via the rail aggregate depots (See Appendix 3: Rail Aggregate Depots) as the geology of the county does not allow for local extraction. Currently Hertfordshire has a total of five such sites which are as follows:

- Langley Sidings, Stevenage;
- Walsworth Road, Hitchin;
- Rye House, Hoddesdon;
- Harper Lane, Radlett; &
- Orphanage Road, Watford

4.56 In 2022, the county received 688,547 tonnes of imported crushed rock. This is a

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<sup>33</sup> The council will only begin to receive Circular Economy Statements once the new Minerals and Waste Local Plan is adopted

<sup>34</sup> Paragraph 4.3, Collated results of the 2019 Aggregate Minerals Survey for England and Wales

<sup>35</sup> Table 1a of the Mineral Products Association publication entitled: 'Profile of the Mineral Products Industry -2020 s

<sup>36</sup> Table 1a of the Mineral Products Association publication entitled: 'Profile of the Mineral Products Industry -2020 Edition'

<sup>37</sup> Table 1.2 from the 'Profile of the UK Mineral Products Industry 2023 Edition (2023)

decrease when compared to 2021's crushed rock imports figure which stood at 739,620 tonnes. Figures for 2023 (provided by the BGS Annual Survey) were not available at the time of writing.

### **Other Relevant Local Information**

#### **Planned Housing**

- 4.57 At least 97,000 new homes are aspired to be created in Hertfordshire over the next 15-year period<sup>38</sup> via the implementation of Adopted/Emerging Local Plans created by the District and Borough Councils. Currently the Districts and Boroughs in Hertfordshire are planning to deliver 8,643 homes per annum.
- 4.58 The majority of the ten District and Borough Councils within Hertfordshire are in the process of preparing new Local Plans or have recently adopted Local Plans. The Local Plans look ahead, typically over a 15-year period. In revising their Local Plans, the District and Borough Councils must calculate the housing need for their local areas, in line with national requirements.
- 4.59 Many of the larger housing allocations/mixed use allocations in the recently adopted Local Plans are starting to come forward and are either at planning application stage, have received planning permission or are under construction.
- 4.60 These allocations are of strategic importance and will help to deliver the county's aspiration of building 97,000 new homes over the next 15-years. The below list provides some examples of the larger allocations (and their housing numbers) in Hertfordshire which are at planning application stage or have recently been granted planning permission:
- Gilston Garden Town- 10,000 homes
  - Bishops Stortford North- 2,200 homes
  - East of Stevenage – 618 homes
  - East of Luton – 1,400 homes
  - North of Baldock- 2,800 homes
  - Stevenage Town Centre- 1,867 homes
  - North of Stevenage- 800 homes
  - Watford Junction – 1,200 homes
  - Broadwater Road, Former Shredded Wheat Site- 1,340 homes
  - Birchall Garden Suburb – 2,650 homes
- 4.61 Development planned for within the District and Borough Local Plans will require aggregate materials for the construction of dwellings and associated infrastructure

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<sup>38</sup> Data from District and Boroughs Adopted/Emerging Local Plans

such as employment, roads, schools and retail. This includes both the need for land won aggregates and secondary and recycled aggregates.

- 4.62 There may however now be an increase in the planned housing in Hertfordshire as, in December 2024, a new NPPF was published which includes changes to the Standard Method for assessing housing needs, resulting in an increase in the overall housing requirement for Hertfordshire. This will support the Governments ambition to deliver 1.5 million new homes over the next five years.
- 4.63 This may lead to an increase in demand for minerals products in the future, however, these changes to the NPPF may not apply to all LPAs in Hertfordshire (see NPPF transitional arrangements), and it remains to be seen whether an uplift in planned housing through Local Plans results in increased delivery in housing overall. The council will monitor this through future LAAs.

### Housing Delivery

- 4.64 Information on gross housing completion rates in Hertfordshire has been obtained from the council's Information Monitoring Team covering the period from 2002/2003-2023/2024<sup>39</sup>. This information can be seen in Appendix 4: Housebuilding.
- 4.65 The gross housing completion rates reached a peak in 2019/20, standing at 4,922. The figure for 2022/23 was almost identical to that reported in 2019/20, standing at 4,921.
- 4.66 The gross housing completion figure for 2023/24 stands at 5,388 which is a slight increase from the reported for 2019/20. This figure compares with 8,643 being planned for annually.
- 4.67 Housebuilding rates can help to provide an indication of the demand for aggregates, but they can only be used as a partial guide to future demand as aggregates sales reflect much wider demands including refurbishment of the housing stock and infrastructure maintenance<sup>40</sup>. However, figures from the Minerals Product Association (MPA) show that there has been an overall improvement in the sale of construction aggregates and asphalt in Great Britain in the second quarter of 2024.
- 4.68 Whilst housebuilding rates increased in 2023, the overall demand for aggregates in Great Britain is reported to have decreased and construction output was expected to contract in 2023, resulting from a sharp slowdown in activity in the sectors which are most exposed to households spending and confidence<sup>41</sup>.

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<sup>39</sup> All data obtained from the council's planning monitoring and information system, SMART Herts.

<sup>40</sup> Practice Guidance on the production and use of Local Aggregate Assessments, Living Document (May 2017), Planning Officers Society and Minerals Products Association

<sup>41</sup> Mineral Products Association, Profile of the UK Mineral Products Industry 2023 Edition (2023) (see Figure 3.4)



- 4.69 There have been wider issues with housing delivery in Hertfordshire, with several of the Districts and Boroughs delivering housing below the required level. The Housing Delivery Test: 2022 measurement indicated that the LPA's were required to deliver 7,100 homes in 2021-22<sup>42</sup> but delivered only 4,597 (Gross)<sup>43</sup>. This should be noted in the context of the new NPPF which has an even higher housing requirement for Hertfordshire overall.
- 4.70 Since 2001 the average net build rate has been 3,790 homes per year within Hertfordshire. This would correspond to around 57,000 homes being created over the next 15-years, rather than the planned 97,000. While the most recent housing completion figure was above this average for 2023/2024 (5,372, gross), it is important to consider Hertfordshire's historic problems with delivering housing when determining the LAA rate.

#### Major Infrastructure

- 4.71 For Hertfordshire, the major infrastructure projects currently being delivered include:

#### High Speed 2 (HS2)

- 4.72 HS2 is a Department for Transport project to build a new high-speed railway between London and Birmingham. Phase 2 of HS2, also known as the 'Northern Leg' will no longer go ahead. The route will now only run from London to Birmingham Interchange, with branches to central Birmingham and Handsacre, near Lichfield. HS2 trains for Manchester, Liverpool and Scotland will join the West Coast Main Line at Handsacre.
- 4.73 A section of the line, due to open in 2026, passes within Hertfordshire's county boundary and requires significant construction works.
- 4.74 The 3.4km Colne Valley Viaduct will carry the HS2 route from Harefield in Hillingdon, over the Colne Valley into Buckinghamshire, before it enters the Chiltern Tunnel (16km) South Portal in Hertfordshire.
- 4.75 Within Hertfordshire, infrastructure such as the Colne Valley Viaduct, the Chiltern Tunnel South Portal and the Colne Valley Western Slopes will be constructed. The Colen Valley Viaduct finished construction in September 2024.
- 4.76 As mentioned, the cancellation of Phase 2, while this wouldn't have taken place in Hertfordshire, may provide an indication to wider issues within the construction industry regarding key infrastructure schemes.

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<sup>42</sup> Housing Delivery Test: 2022 measurement

<sup>43</sup> Data from Hertfordshire County Council's Growth and Infrastructure Unit

4.77 The Chilterns South Portal Chalk Grassland Project is the largest project in the HS2 Green Corridor programme. The site will be transformed into one of the largest areas of new chalk grassland in the Chiltern hills. The chalk grassland will cover 90 hectares and will be seeded into re-profiled soil layers using the nutrient poor subsoils mixed with chalk resulting from the tunnelling works and with recycled concrete and aggregates arising from construction works<sup>44</sup>.

#### Active Travel Fund

4.78 A plethora of walking and cycling improvements are being delivered across the county. The council received a further £4.6 million of funding from Active Travel England's active travel fund in May 2023. This funding will be used for schemes in Digswell, Hemel Hempstead, Hertford, Watford, Welwyn Garden City and Wheathampstead (due to be underway by spring 2024). The improvements support the objectives in the Local Transport Plan (LTP4) and Sustainable Hertfordshire strategy, to make it easier and safer to walk, wheel and cycle<sup>45</sup>.

4.79 In southwest Hertfordshire, two large-scale infrastructure projects are at the early planning stage. These two projects are detailed below.

#### The West Hertfordshire Hospitals NHS Trust

4.80 The proposals would involve the redevelopment of Watford General, alongside significant improvements to the trust's other sites in St Albans and Hemel Hempstead<sup>46</sup>.

#### The Hertfordshire Essex Rapid Transit

4.81 The Hertfordshire Essex Rapid Transit (HERT) is intended to be a new, sustainable passenger transport network. HERT will run from Hemel Hempstead and West Watford, joining just south of St Albans, to Harlow in Essex and onwards to Stansted Airport. It will connect with north-south rail lines and create new journey possibilities across the county and beyond<sup>47</sup>.

### **Other Relevant Local Information**

#### Major Projects in Neighbouring Authority Areas

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<sup>44</sup> <https://www.hs2.org.uk/in-your-area/local-community-webpages/hs2-in-hertfordshire/>

<sup>45</sup> <https://www.hertfordshire.gov.uk/services/highways-roads-and-pavements/roadworks-and-road-closures/major-roadwork-projects/active-travel-fund.aspx>

<sup>46</sup> <https://www.swhertsplan.com/planning-for-infrastructure>

<sup>47</sup> [https://www.hertfordshire.gov.uk/services/highways-roads-and-pavements/roadworks-and-road-closures/major-roadwork-projects/hert.aspx#DynamicJumpMenuManager\\_1\\_Anchor\\_1](https://www.hertfordshire.gov.uk/services/highways-roads-and-pavements/roadworks-and-road-closures/major-roadwork-projects/hert.aspx#DynamicJumpMenuManager_1_Anchor_1)

- 4.82 The Managed Aggregate Supply System requires minerals planning authorities which have adequate resources of aggregates to make an appropriate contribution to national as well as local supply<sup>48</sup>. As explained in this Chapter, Hertfordshire exports some sand and gravel outside of the county. This exported material contributes to national supply.
- 4.83 In addition to considering major infrastructure projects within Hertfordshire, it is important to consider planned projects outside of Hertfordshire which could have the potential to draw from the county's supply of sand and gravel resources.
- 4.84 Paragraph 3.8 of The Planning Officers Society and Mineral Products Association Practice Guidance on the production and use of LAAs Living Document (May 2017) states that LAAs should consider, where relevant, projects actually referred to in the National Infrastructure Delivery Plan which are within about 30 miles of the mineral planning authority, as this could have aggregate demand implications, although the source of construction materials will be determined by the market.
- 4.85 Whilst the National Infrastructure Delivery Plan (2016 to 2021) is now out of date, the below list provides some examples of major long-term projects within neighbouring authority areas (within a 30-mile radius of Hertfordshire) which have the potential to draw from the county's supply of sand and gravel resources in the future. These planned major projects include a mixture of housing, retail, employment and leisure uses as well as the infrastructure required to support them (e.g., roads).
- Harlow Gilston Garden Town- approx. 23,000 units (10,000 of the 23,000 will be built in Hertfordshire)<sup>49</sup>
  - Marston Moreteyne , Central Bedfordshire- approx. 5,000units<sup>50</sup>
  - North of Luton, Bedfordshire- approx. 3,600 units<sup>51</sup>
  - East of Arlesey, Bedfordshire – approx. 2,000 units<sup>52</sup>
  - Northstowe New Town, Cambridgeshire – approx. 10,000 units<sup>53</sup>
  - Meridian Water, Enfield – approx. 10,000 units<sup>54</sup>
  - South East Milton Keynes Strategic Urban Extension – approx.3,700 units<sup>55</sup>

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<sup>48</sup> Planning Practice Guidance Paragraph: 060 Reference ID: 27-060-20140306

<sup>49</sup> <https://hgmt.co.uk/>

<sup>50</sup>

[https://www.centralbedfordshire.gov.uk/info/153/central\\_bedfordshire\\_local\\_plan\\_2015\\_to\\_2035/1040/new\\_villages\\_in\\_marston\\_vale](https://www.centralbedfordshire.gov.uk/info/153/central_bedfordshire_local_plan_2015_to_2035/1040/new_villages_in_marston_vale)

<sup>51</sup>[https://www.centralbedfordshire.gov.uk/info/153/central\\_bedfordshire\\_local\\_plan\\_2015\\_to\\_2035/1043/expanding\\_luton](https://www.centralbedfordshire.gov.uk/info/153/central_bedfordshire_local_plan_2015_to_2035/1043/expanding_luton)

<sup>52</sup>[https://www.centralbedfordshire.gov.uk/info/153/central\\_bedfordshire\\_local\\_plan\\_2015\\_to\\_2035/1042/new\\_homes\\_near\\_arlesey](https://www.centralbedfordshire.gov.uk/info/153/central_bedfordshire_local_plan_2015_to_2035/1042/new_homes_near_arlesey)

<sup>53</sup> <https://www.northstowe.com/>

<sup>54</sup> <https://www.meridianwater.co.uk/about/>

<sup>55</sup> <https://www.milton-keynes.gov.uk/planning-and-building/planning-policy/south-east-milton-keynes-strategic-urban->



## **Summary**

- 4.88 As of the end of 2023, the 10-year sales average figure stood at 1.13Mt, a decrease from last year's figure of 1.16Mt. In line with the NPPF and The Practice Guidance on the production and use of Local Aggregate Assessment Living Document May 2017, the LAA Rate should be based on the 10-year sales average figure. Any deviation from this figure would need to be supported by sufficiently robust information.
- 4.89 With regards to other supply options outside of Hertfordshire's own permitted reserves of sand and gravel, the county does meet some of its demands through imports from both land won and marine sources.
- 4.90 When balanced against the sand and gravel exports, the imported supply does not amount to a quantity which could be said to be making a significant contribution towards meeting demands in Hertfordshire.
- 4.91 Secondary and recycled aggregates represent an alternative supply option to primary sand and gravel. This year's total recycled aggregate processing figure stands at approximately 377,397 tonnes.
- 4.92 Whilst secondary and recycled aggregates are contributing towards supply and subsequently reducing demand for primary material, it's not possible to understand the impact this is having locally in terms of the extent to which it reduces demand for primary sand and gravel.
- 4.93 It is estimated that nationally, recycled and secondary aggregates materials account for 30% of aggregate supply and this level of contribution will sustain up until 2035. A continued supply of primary aggregates will therefore continue to be necessary to meet overall demand.
- 4.94 The level of planned housing needs to be balanced against housing delivery rates. Whilst there is an aspiration to build a significant number of new homes in the county, the historic and planned housing delivery rate is much lower than what would be necessary to achieve these aspirations. Housing delivery rates can only be used as a partial guide to future demand as aggregates sales reflect much wider demands.
- 4.95 In terms of major projects, the county's supply of sand and gravel will be used to meet demands for these projects, both inside and outside of the county. As with planned housing, a realistic view of delivery needs to be applied. Whilst there are several projects planned or under construction, the rate of delivery will greatly influence the demand for sand and gravel. It is not possible to predict which major projects outside of the county will draw from the county's resource of sand and

gravel. It is also important to consider that the MPA highlights potential uncertainty regarding major infrastructure across the country.<sup>59</sup>

- 4.96 The demand for sand and gravel in recent years has been particularly unstable. Following the slowdown and temporary shut down in the construction sector caused by the pandemic in 2020, construction demand for aggregates saw a rebound in 2021, albeit a very small rebound for the Hertfordshire total sand and gravel sales figure. Since 2021 minerals product sales are heading towards a third consecutive year of decline in 2024<sup>60</sup>.
- 4.97 The construction sector did see slight overall growth in output 2023. However, with the value of new construction contracts awarded decreasing by 14% between 2022 and 2023, the new housing output decreasing by almost 12%, and current uncertainty surrounding major infrastructure projects, there may not be the appropriate demand for minerals products within the construction sector.
- 4.98 Despite Government's plans to increase housing delivery through a change to the standard method for assessing local housing need and their aim to deliver 1.5 million houses in the next 5 years, industry outlook, based on information from the MPA, CPA and other sources, suggests that the sale of minerals is not expected to increase within 2024.
- 4.99 In balancing all the above, the council cannot justify an LAA Rate which deviates from the 10-year sales average figure.

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<sup>59</sup> Regional overview of construction and mineral products markets in Great Britain 2024 edition (2024)

<sup>60</sup> Regional overview of construction and mineral products markets in Great Britain 2024 edition (2024)

## 5. The Hertfordshire Landbank

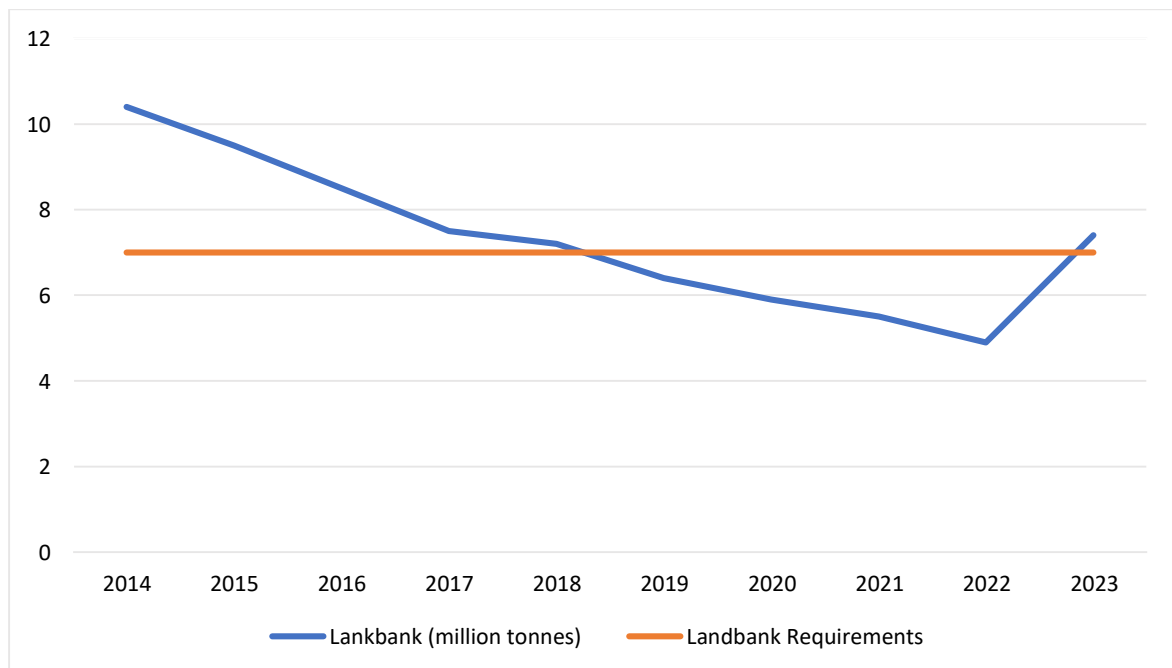
5.1 Paragraph 226f of the NPPF states that minerals planning authorities should maintain a landbank of at least 7 years for sand and gravel. The PPG also states:

***'How and when do I calculate aggregate landbanks?***

*Aggregate landbanks should be recalculated each year. The length of the aggregate landbank is the sum in tonnes of all permitted reserves for which valid planning permissions are extant, divided by the annual rate of future demand based on the latest annual Local Aggregate Assessment<sup>61</sup>*

5.2 The LAA Rate for 2023 is 1.13Mt. This results in a landbank of 7.4 years as of the end of 2023. Figure 5 below shows the landbank figures over the 10-year period from 2014 to 2023.

**Figure 5: Landbank (in Years)**



5.3 As can be seen from Figure 5 above, Hertfordshire currently has a landbank over 7 years. Paragraph 226e of the NPPF states that minerals planning authorities should use landbanks of aggregate minerals reserves principally as an indicator of the security of aggregate minerals supply, and to indicate the additional provision that needs to be made for new aggregate extraction and alternative supplies in mineral plans.

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<sup>61</sup> Paragraph: 083 Reference ID: 27-083-20140306

5.4 As explained in Chapter 3, there are mechanisms in place to help secure a future supply of sand and gravel and the site at Land adjoining Coopers Green Lane being granted permission in 2023 has led to the boost in reserves (and subsequently the landbank figure) since 2022.



## 6. Conclusion

- 6.1 The current stock of permitted reserves of sand and gravel in Hertfordshire is sufficient to meet future demands.
- 6.2 As of the end of 2023, the landbank stands at 7.4 years and is therefore 0.4 years above the required 7-year minimum.
- 6.3 The emerging Minerals and Waste Local Plan is being prepared to identify sand and gravel sites considered to be appropriate for future extraction. The supply from Land Adjoining Coopers Green Lane (3.52Mt) has been added to the permitted reserves and has provided a boost to the landbank.
- 6.4 In addition, two of the three Preferred Areas in the adopted 2007 Minerals Local Plan still contain potentially workable reserves. This means that there are potentially workable resources still available whilst the new Minerals and Waste Local Plan is being prepared.
- 6.5 The LAA Rate for 2023 is based on the 10-year sales average figure (1.13Mt) and is considered a realistic forecast of the current annual rate of future demand. The NPPF requires mineral planning authorities to prepare an LAA to forecast future demand, based on a rolling average of 10 years sales data.
- 6.6 In deciding the LAA Rate, the council has considered trends in the sand and gravel sales data and has assessed all other options that contribute towards supply, as well as other local information such as housebuilding rates and major projects.
- 6.7 The forecasted slowdown in construction delivery rates and decrease in demand for aggregates must be considered against this information. Prospects for construction demand for mineral products in 2024 are weak, given the poor outlook for growth and increased delivery risks for construction projects.
- 6.8 In balancing the information on sales, other supply options and other local information against the current and predicted slowdown in growth momentum and aggregate demands, the council cannot justify an LAA Rate which deviates from the 10-year sales average figure.

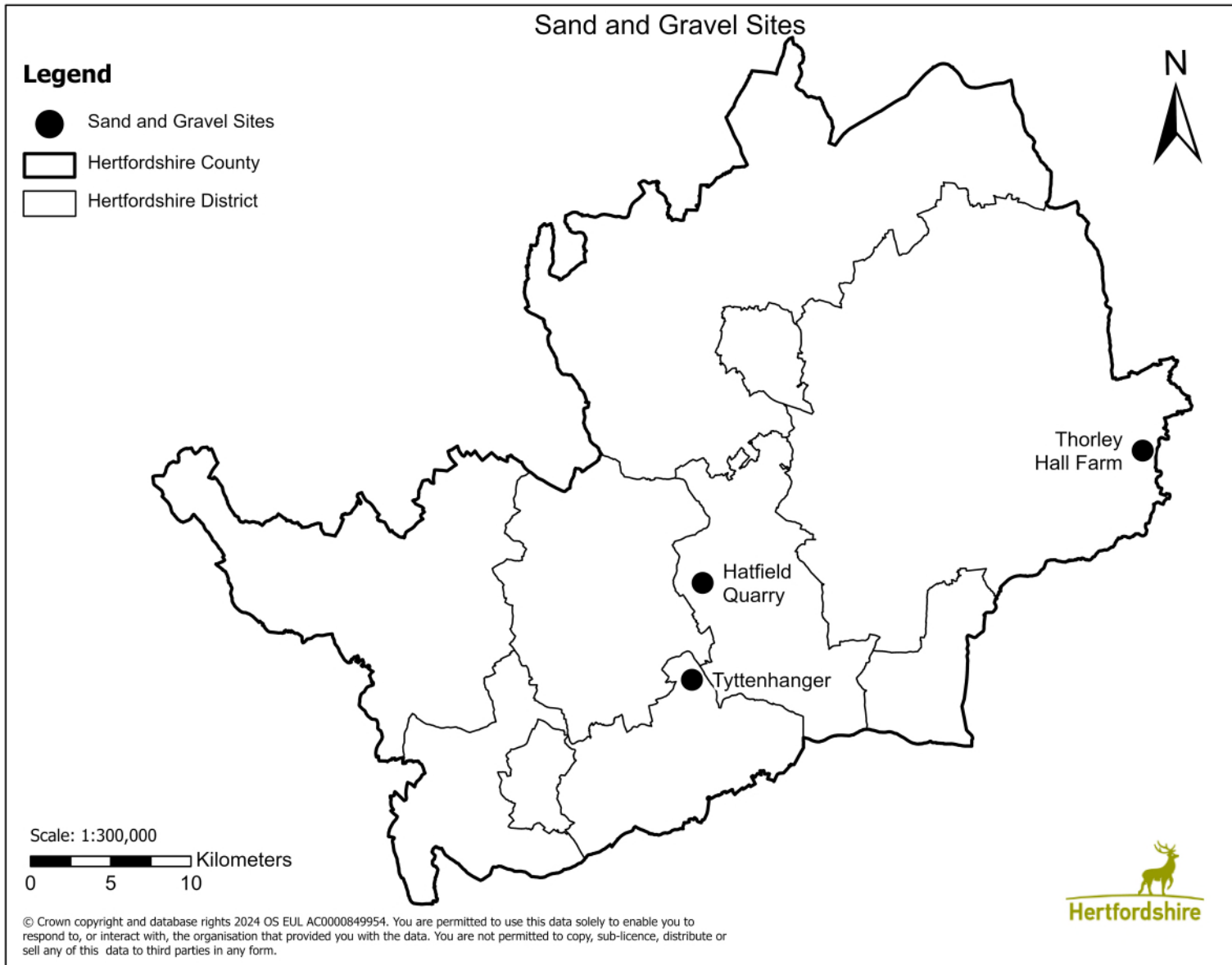
## Appendix 1: Sand and Gravel Sites

Site Name	Operator	Status	Restoration	Cessation dates
<p><b>Hatfield Quarry</b></p> <p>Hatfield Quarry is comprised of the following permitted sites:</p> <p>Cutfield Landfill (restoration of Cutfield Lagoon) - Inert fill only (planning reference number: 5/1240-14)</p> <p>Land Adjoining Coopers Green Lane (planning reference number: PL\0963\18)</p>	Cemex UK Ltd	<p>Active.</p> <p>Extraction and inert fill</p>	Inert restoration	<p>Cutfield Lagoon infilling and restoration stage must reach completion not later than 31 12 2025</p> <p>Land Adjoining Coopers Green Lane to have finished works 10 years after works have started.</p>
<p><b>Tytenhanger Quarry</b></p> <p>(planning reference number: 0/1353-06)<sup>62</sup></p>	Tarmac Ltd	<p>Active.</p> <p>Extraction and inert fill.</p>	Inert restoration	Extraction and site permission 31-12-2032
<p><b>Thorley Hall Farm</b></p> <p>(planning reference number: PL\0549\13)</p>	Ingrebourne Valley Ltd	<p>Active.</p> <p>Extraction taking place.</p>	Agricultural reservoir	Reservoir construction & restoration works are to be completed by 31-10-2025 <sup>63</sup>

<sup>62</sup> Tytenhanger has a long and complicated planning history. This is the most relevant planning reference number, which relates to the most recently permitted area for extraction. To search the 2001 planning consent (50.5 hectare extraction area) use reference number 5/0250-97

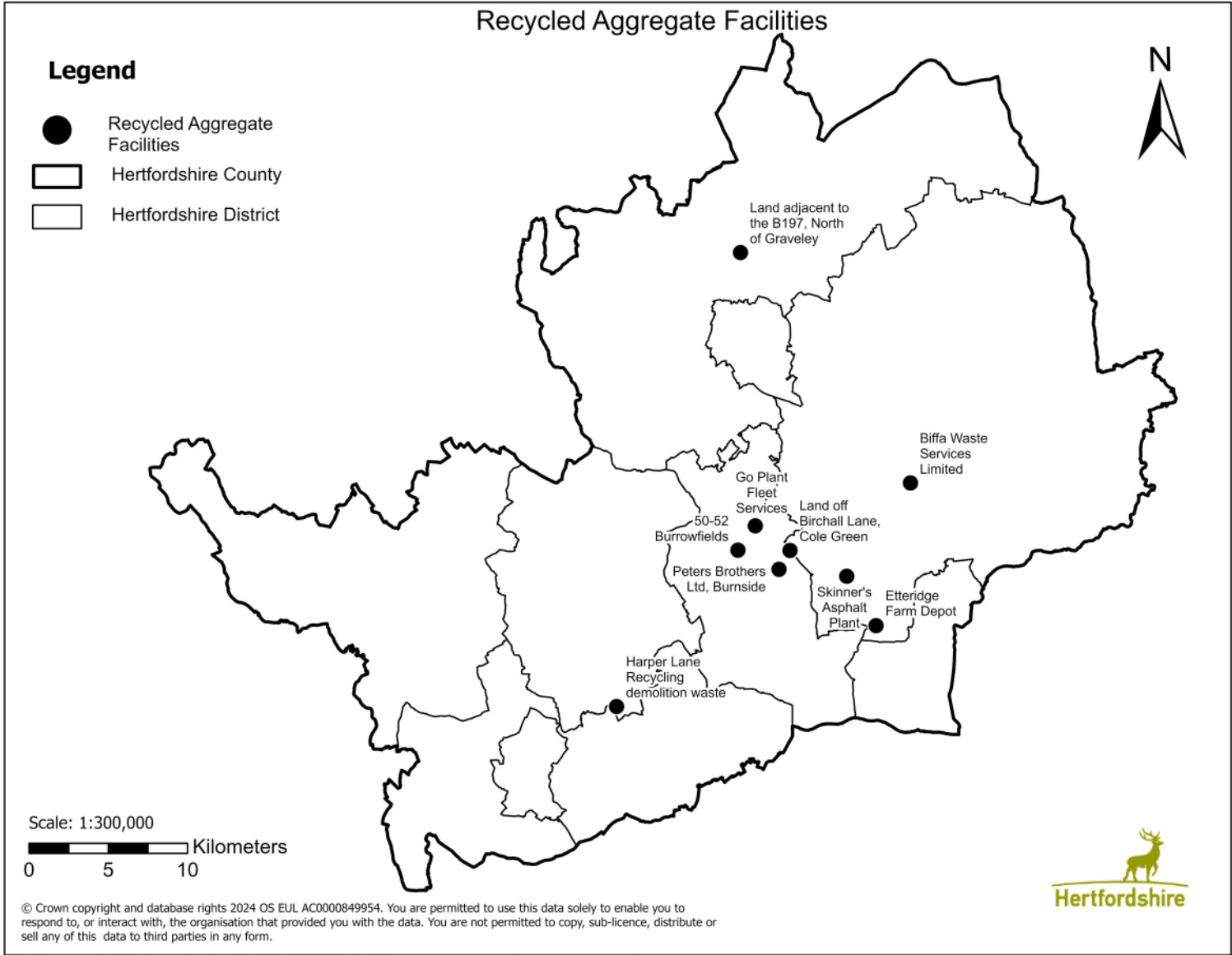
<sup>63</sup> Cessation date extended. Search using planning reference PL/0422/24

<p><b>Westmill Landfill</b></p> <p>(planning reference number: PL\0750\15)</p>	<p>Biffa Waste Services Ltd</p>	<p>Active.</p> <p>Excavation is complete. Site active as a landfill only. The site receives restoration soils and inert materials.</p>	<p>Non-hazardous restoration</p>	<p>Final restoration to be completed by 31-12-2027.</p>
<p><b>Panshanger Landfill</b></p> <p>(planning reference number: PL\0684\15)</p>	<p>Tarmac Ltd BP Mitchell Haulage Limited</p>	<p>Active.</p> <p>Excavation is complete. Inert restoration taking place.</p>	<p>Inert restoration</p>	<p>Restoration to be completed within 10 years of commencement of importation of infill (Infill commenced on 28 January 2019).</p>
<p><b>Braziers Landfill</b></p> <p>(planning reference number: 3/1416-97. Inert restoration taking place on an extant planning permission)</p>	<p>Frank Lyons Services Group</p>	<p>Active</p> <p>Inert restoration taking place on extant permission granted in 1998. The site began taking waste on 05 March 2018.</p>	<p>Inert restoration</p>	<p>Minerals/depositing of waste shall cease on or before 21 February 2042.</p>

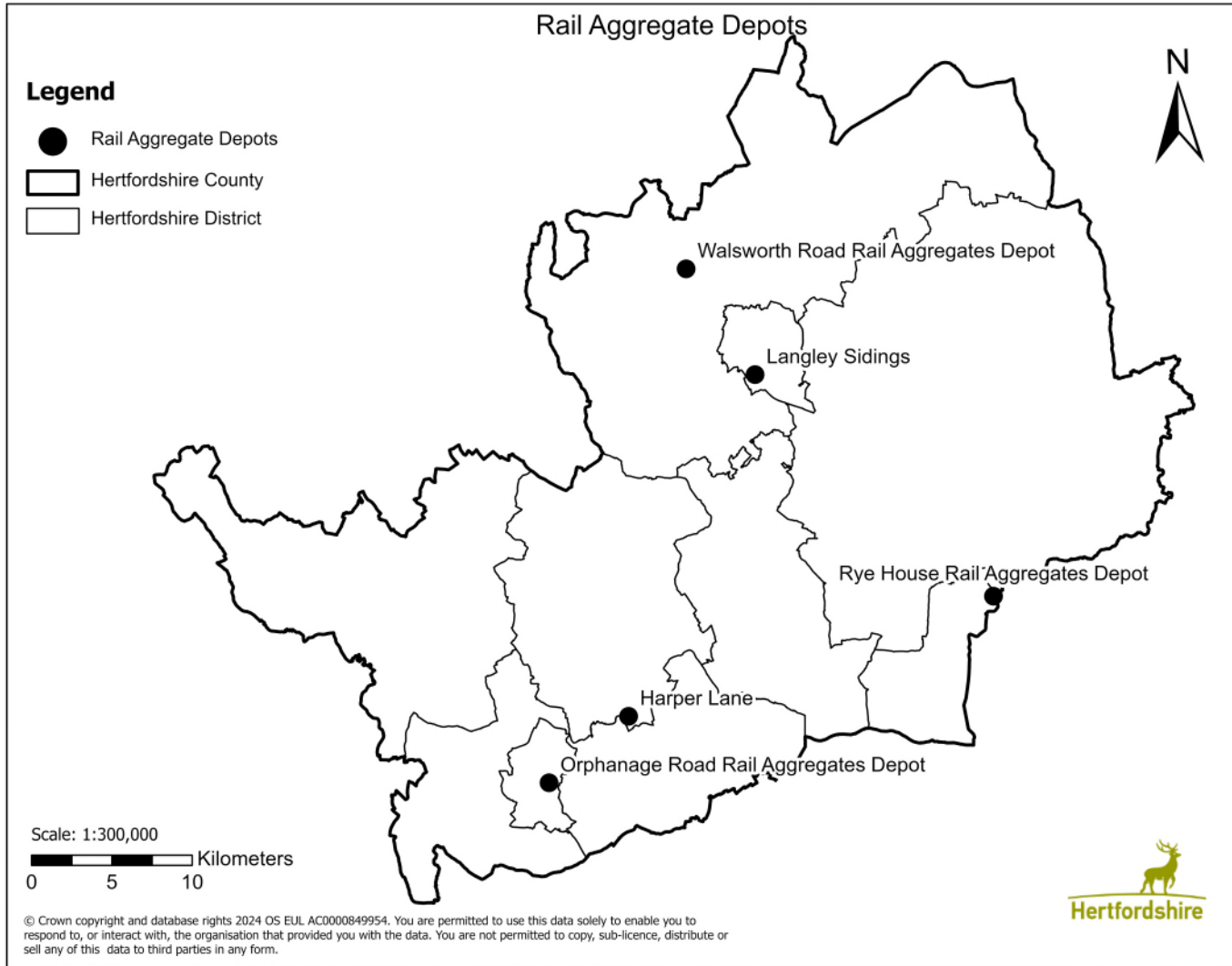


## Appendix 2: Fixed Aggregate Recycling Facilities

Site	Company
The Envirowaste Recycling Centre	Stevenage Skip Hire Ltd
50-52 Burrowfields	Ground Waste Recycling Ltd
Etteridge Farm Depot	A H Nicholls & Sons Limited
Land off Birchall Lane, Cole Green	BP Mitchell Ltd
Burnside No 2 Transfer Station, Hatfield	Peters Brothers Limited
Harper Lane Recycling demolition waste	Tarmac Aggregates Limited
Skinner's Asphalt Plant	Aggregate Industries UK Ltd T/A Express Asphalt
Go Plant Fleet Services	Go Plant Ltd
Biffa Waste Services Limited	Biffa Waste Services Limited



## Appendix 3: Rail Aggregate Depots



## Appendix 4: Housebuilding (Gross)

District/Borough	2002/03	2003/04	2004/05	2005/06	2006/07	2007/08	2008/09	2009/10	2010/11	2011/12	2012/13	2013/14
<b>Broxbourne</b>	155	267	916	508	287	298	202	333	278	180	192	119
<b>Dacorum</b>	705	446	333	250	480	472	459	259	636	477	364	254
<b>East Herts</b>	397	297	381	644	812	599	597	494	304	445	729	394
<b>Hertsmere</b>	111	215	251	341	285	409	328	331	225	217	334	473
<b>North Herts</b>	685	482	437	569	662	769	488	390	455	422	314	274
<b>St Albans</b>	357	285	668	379	439	337	466	329	495	466	400	504
<b>Stevenage</b>	101	58	171	130	414	471	400	255	312	196	90	179
<b>Three Rivers</b>	255	186	94	229	369	286	351	69	160	261	208	172
<b>Watford</b>	192	277	379	638	292	336	369	540	665	479	568	431
<b>Welwyn Hatfield</b>	504	825	682	737	708	768	348	83	216	309	170	254
<b>Total</b>	<b>3,462</b>	<b>3,338</b>	<b>4,312</b>	<b>4,425</b>	<b>4,748</b>	<b>4,745</b>	<b>4,008</b>	<b>3,083</b>	<b>3,746</b>	<b>3,452</b>	<b>3,369</b>	<b>3,054</b>

District/Borough	2014/15	2015/16	2016/17	2017/18	2018/19	2019/20	2020/21	2021/22	2022/23	2023/24	Total
<b>Broxbourne</b>	184	183	276	260	483	165	211	337	541	671	<b>7,046</b>
<b>Dacorum</b>	402	701	764	628	532	522	760	845	662	532	<b>11,483</b>
<b>East Herts</b>	535	739	668	613	943	989	853	904	898	1,409	<b>14,644</b>
<b>Hertsmere</b>	225	406	340	562	677	623	521	352	218	216	<b>7,660</b>
<b>North Herts</b>	251	360	556	346	249	338	601	348	474	437	<b>9,907</b>
<b>St Albans</b>	398	457	404	493	731	474	604	378	448	492	<b>10,004</b>
<b>Stevenage</b>	154	155	704	77	295	328	154	126	163	178	<b>5,111</b>
<b>Three Rivers</b>	308	243	164	286	174	510	277	203	220	276	<b>5,301</b>
<b>Watford</b>	271	308	384	357	292	278	454	812	787	768	<b>9,877</b>
<b>Welwyn Hatfield</b>	356	338	370	314	505	695	421	292	510	409	<b>9,814</b>
<b>Total</b>	<b>3,084</b>	<b>3,890</b>	<b>4,630</b>	<b>3,936</b>	<b>4,881</b>	<b>4,922</b>	<b>4,856</b>	<b>4,597</b>	<b>4,921</b>	<b>5,388</b>	<b>90,847</b>



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