Leicestershire County Council

Local Aggregate Assessment 2025

(Based on 2024 Data)

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Executive Summary

1.0 The National Planning Policy Framework (NPPF) requires Mineral Planning Authorities (MPAs) to plan for a steady and adequate supply of aggregates by preparing a Local Aggregates Assessment (LAA). The LAA is required to forecast the demand for aggregates based on average 10 years' sales data and other relevant local information; analyse all aggregate supply options; and assess the balance between demand and supply. Planning Policy Guidance states that MPAs should also 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.

1.1. This is the thirteenth LAA for Leicestershire which includes the most recent (2024) aggregate sales and reserves data for the County. The 10-year period covered by this LAA is 2015 up to 2024. Summary sales figures for the period 01/01/2024 – 31/12/2024 are displayed in Table 1 below. The main facts and figures from the report (by aggregate type) are set out below.

1.2. In the year 2024 Leicestershire had two active sand and gravel quarries, which had a total potential production capacity of around 800,000 tonnes per annum. The average sales for sand and gravel for the most recent 10-year rolling period (2015 – 2024), and most recent 3-year rolling period (2022 – 2024), are 0.89 Mtpa (million tonnes per annum) and 0.23 Mtpa respectively. Sales in 2024 were 0.21 million tonnes, which was a 4.5% decrease on sales observed in 2023. This follows a 15% decrease on sales in 2022. Estimated permitted reserves on 31st December 2024 were recorded as 2.80 million tonnes. During the compilation of this report and the monitoring year 2025, extraction permanently ceased at one of the sand and gravel sites, which has required a recalculation of the estimated reserves figure to 2.67 million tonnes. However, this includes reserves at currently inactive sites. Having previously reported reserves sufficient for 3.15 years, based on average sales over the 10-year rolling period (2015-2024), the landbank figure must therefore be adjusted to 2.38 years. This figure represents a significant shortfall against the stated Policy M1 in committing to maintain a 7 year landbank for sand and gravel. When calculated using 2.67 million tonnes reserves figure, averaged sales based on the most recent 3-year period would provide sufficient material for approximately 12 years. Again, this would reduce significantly if you remove reserves from the inactive sites.

1.3. Demand is likely to increase as government planning reforms come into effect and planned projects begin construction – such as the £2.5bn STEP fusion project in Nottinghamshire which will require a range of aggregates for the full construction period, with completion estimated by 2040. As surrounding authorities are also struggling with sand and gravel reserves, the shortfall will add to the collective pressure to provide sufficient levels of sand and gravel to meet local and national demand.

1.4. Leicestershire plays a nationally important role in crushed rock supply and in exporting crushed rock to other regions. Leicestershire currently has five active igneous rock quarries, four of which are rail-linked (including two principal rail-served hubs), together with two active limestone quarries. These quarries have a total potential production capacity of around 13.5 million tonnes. Within this report, and as reported previously, crushed rock encompasses both igneous rock and limestone. The average sales for crushed rock for the most recent 10-year rolling period (2015– 2024), and most recent

3-year rolling period (2022 – 2024) are 12.14 Mtpa and 10.55 Mtpa respectively. Sales of crushed rock within the County in 2024 were 10.71 million tonnes, which was a 12.5% increase on sales observed in 2023. Estimated permitted reserves on 31st December 2024 were 276.15 million tonnes. Based on the 10-year provision rate (Table 14), there are currently sufficient permitted reserves for 22.74 years. This is sufficient to maintain the Government's requirement for a landbank of at least ten years, but as mentioned, new projects such as the STEP fusion project in Nottinghamshire and other infrastructure projects will impact the demand for aggregates within the region.

1.5. The reported figures suggest that there are sufficient permitted crushed rock reserves to meet requirements over the course of the current Local Plan period (up to 2031). It should however be noted that a new Local Plan process will review site allocations and that there are a number of current permissions that come to an end in 2041/2042, so it is recognised that new permissions will be required.

1.6. There are approximately 20 operational construction and demolition (C&D) recycling sites within Leicestershire. The total capacity of these sites is estimated to be around 1.26 million tonnes per annum. There are currently no industrial processes in Leicestershire which are known to produce 'secondary' aggregates.

1.7. After considering local factors, national growth projections and recent production levels, it has been concluded that the calculation of landbanks should continue to be based on the rolling 10-year average sales. The production guideline identified by this Local Aggregates Assessment is 0.89 million tonnes per annum for sand and gravel and 12.14 million tonnes per annum for crushed rock (See Tables 13 and 14). There will be a potential shortfall of sand and gravel reserves within Leicestershire over the period to 2031 of some 3.56 million tonnes based on the production guideline. Last year's LAA reported a shortfall of 5.09 million tonnes. The fall can be accounted for by a reduced annual requirement and 10-year average sales figure due to consistent falling annual sales and by the subtraction of one year from the end of the plan period. The Leicestershire Minerals and Waste Local Plan (up to 2031) which was adopted on the 25th of September 2019 allows for additional provision to be made from unallocated areas and extensions to existing sites, provided certain criteria are met.

1.8. As previously reported, an application for an extension at Lockington Quarry to release approximately 3.3 million tonnes of sand and gravel to be worked in six phases over a 10 year period, at a rate of 350,000 tonnes per annum (reference 2019/2358/07) was submitted in 2020 and has been resolved to be permitted, subject to a s106 agreement. An application for a proposed new sand and gravel quarry in Quorn, Leicestershire (One Ash Quarry), was submitted in 2021. The application seeks planning permission for the extraction of 1.01 million tonnes of sand and gravel and remains undetermined. An application for further extraction of 900,000 tonnes of sand and gravel at Husbands Bosworth Quarry was granted planning permission in January 2023 (reference 2021/0683/03) and is now currently operational. Further, an application has recently been submitted for a new quarry at Misterton for the proposed extraction of approximately 8 million tonnes of sand and gravel. The applications in progress demonstrate that industry demand is present.

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

	2024 Sales (million tonnes	**10-year Sales Average** (million tonnes)	**3-year Sales Average** (million tonnes)	**Change in sales** (since 31st December 2023)	**LAA calculated annual requirement** (million tonnes)	**Permitted Reserves** (million tonnes)	**Landbank** (in remaining years)	**Theoretical Capacity** (million tonnes per annum)	**Comments**
Sand and gravel	0.21	0.89	0.23	↓	0.89	2.67	2.38	0.2 (*excluding inactive sites)	Sales were down 4.5% from those in 2023. They were lower than the 10-year average and marginally lower than the 3-year sales average.
Crushed rock	10.71	12.14	10.55	↑	12.14	276.15	22.7	13.5 (*excluding inactive sites)	Sales were up 12.5% from those experienced in 2023. Sales were lower than the 10-year sales average, but higher than the 3-year sales averages.
Recycled & secondary aggregate	0.2	No data available	No data available	No data available	N/A	N/A	N/A	1.26	Data requested from all operators but only provided for one site.

2. Introduction

2.1. The supply of land-won aggregate in England is based on the national Managed Aggregate Supply System (MASS) which seeks, through Government guidance, to ensure a steady and adequate supply of aggregates; handling the significant geographical imbalances in the occurrence of minerals and the areas where they are most needed.

2.2. The National Planning Policy Framework 2024 (NPPF) requires an annual Local Aggregate Assessment (LAA) to be produced by Mineral Planning Authorities to plan for a steady and adequate supply of aggregates. Aggregates are materials used in the construction industry for building purposes, including asphalt and concrete.

2.3. According to the requirements of the National Planning Policy Framework (NPPF), all of the local authorities within England which have responsibilities for minerals planning (Mineral Planning Authorities – MPAs) are required to 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 ten years' sales data and other relevant local information, and an assessment of all supply options (including marine dredged, secondary and recycled sources); participating in the operation of an Aggregate Working Party and taking the advice of that party into account when preparing their Local Aggregate Assessment.

2.4. The NPPF also states that MPAs should "so far as practicable, take account of the contribution that substitute or secondary and recycled materials and minerals waste would make to the supply of materials, before considering extraction of primary materials, whilst aiming to source minerals supplies indigenously" (paragraph 223).

2.5. National Planning Practice Guidance confirms that a Local Aggregate Assessment should contain three elements:

- a forecast of the demand for aggregates based on both the rolling average of ten-years sales data and other relevant local information;
- an analysis of all aggregate supply options, as indicated by landbanks, mineral plan allocations and capacity data. This analysis should be informed by planning information, the aggregate industry and other bodies such as local enterprise partnerships;
- 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.

2.6. In addition to the Government's planning practice guidance it should be noted that the Planning Officers' Society and the Mineral Products Association jointly published a Practice Guidance Document on the Production and Use of Local Aggregate Assessments in April 2015, updated in May 2017. Although non-statutory this document sets out good practice and provides a useful health check to ensure the robustness of an LAA.

2.7. This LAA document has been prepared in accordance with the guidance referred to above and represents the thirteenth LAA for the County of Leicestershire. The LAA sets out the current supply of and demand for aggregates in the County and indicates the provision that will be needed to ensure that Leicestershire continues to make an appropriate contribution to the steady and adequate supply of aggregates.

2.8. The Leicestershire Minerals and Waste Local Plan (up to 2031) was adopted by Leicestershire County Council on 25th of September 2019. A review of the Plan was carried out during 2022 which found that the Plan was continuing to perform well, and its implementation is delivering sustainable minerals development in Leicestershire as intended. This LAA will form part of the evidence base to inform the next review of the Leicestershire Minerals and Waste Local Plan. Revised LAAs will be produced annually as part of the Local Plan monitoring procedures.

2.9. The LAA is submitted to the East Midlands Aggregates Working Party (EMAWP), an advisory body made up of MPAs across the region, for consideration and scrutiny. The AWP has a role to monitor the operation of the MASS through providing technical advice, particularly on supply provision.

2.10. Policy M1 (Supply of Sand and Gravel Aggregate) of the Plan indicates the level of provision to be made for sand and gravel aggregate within Leicestershire over the period 2015 to 2031, is 19 million tonnes, which equates to an annual requirement of 1.12 million tonnes.

2.11. Policy M4 (Crushed Rock) of the Plan indicates the level of provision to be made for crushed rock for aggregate purposes within Leicestershire over the plan period, is some 231 million tonnes, which equates to an annual requirement of 13.6 million tonnes.

3. Types of aggregate produced in Leicestershire

Sand and Gravel

3.1. In Leicestershire, sand and gravel for aggregate use is sourced from two distinct types of deposit, namely sub-alluvial and river terrace; and glaciofluvial.

3.2. The main sources of sub-alluvial and river terrace deposits in Leicestershire are Quaternary and Recent age deposits in the valleys of the Rivers Trent, Soar and Wreake. Similar, but smaller areas, of sand and gravel are also associated with the River Sence and the Rivers Avon and Welland along the southern borders of Leicestershire.

3.3. A series of isolated Glaciofluvial deposits occur in areas to the south and west of Leicester. The full extent of this resource is unknown, however, as areas of wholly concealed bodies of sand and gravel may occur under spreads of till and other drift deposits. The extensive boulder clay and other drift deposits which cover central and eastern parts of Leicestershire may conceal potential deposits.

3.4. Deposits of solid sand and gravel sources in the form of the Triassic Bunter Pebble Beds occur in two areas in the north-west of Leicestershire, around Measham and Castle Donington. Blown sand deposits resulting from aeolian reworking of river and glacial deposits and bare Triassic bedrock occur in the Vale of Belvoir.

3.5. The deposits will be considered collectively under the term “sand and gravel” in the rest of this report.

Igneous Rock

3.6. Outcrops of Precambrian / Cambrian igneous rocks occur in Charnwood Forest and in south Leicestershire. Within Charnwood Forest, the intrusions form two main groups: a southern group around Markfield, Bradgate and Groby; and a northern group, which extends towards Shepshed. Volcanic lavas of Precambrian origin occur in exposed masses around Bardon Hill, High Sharpley and Pedlar Tor. Igneous rock intrusions also occur around Mountsorrel, and at locations to the south-west of Leicester, including Enderby, Earl Shilton, Huncote, Stoney Stanton and Sapcote.

Limestone

3.7. In north-west Leicestershire, Carboniferous limestones crop out in several small, isolated inliers which locally form prominent hills above the surrounding Triassic rocks near to the Leicestershire/Derbyshire border. The inliers between Breedon and Thringstone consist mainly of pinkish-yellow, bedded and massive dolomite (dolostone).

3.8. Lincolnshire Limestone of Jurassic age occurs in North East Leicestershire. The various limestone units making up the Lincolnshire Limestone form a relatively thick and persistent formation which produce aggregates, for uses such as fill and sub-base roadstone.

4. Current situation regarding land won aggregates in Leicestershire

Introduction

4.1. Production and sales data for aggregate minerals is collected on an annual basis, through an aggregate survey undertaken on behalf of the East Midlands Aggregates Working Party (EMAWP). Annually published EMAWP reports present data on production and reserves for the County.

4.2. Every fourth year Aggregate Working Parties conduct a major in-depth survey. This includes the collection of data on the distribution of sales. The latest national survey, the 2023 Aggregate Minerals Survey for England and Wales (2023 AMS) was undertaken by The British Geological Survey (BGS) in 2024. This forms the latest data available for use.

Land-won sand and gravel

4.3. In the survey period there were two sites active in Leicestershire, at Husbands Bosworth and Shawell (both Harborough District). However, Shawell has since ceased extraction and closed operations.

Sales

4.4. Sales of aggregate from sand and gravel operations within Leicestershire over the last 10 years are shown in Table 2 below. Reflecting improvements in the economy and levels of construction, sales between 2015 and 2017 averaged 1.46 million tonnes per annum. However, there was a downturn in sales in 2018 where sales were 20% lower than in 2017. Sales increased in 2019 to 1.25 million tonnes, some 6% higher than the previous year. Following this, sales plummeted 46% in 2020 owing to the effects of the pandemic, including national lockdowns, and the temporary shutdowns of individual mineral extraction sites and construction sites. Sales figures in 2021 increased slightly but contracted again to their lowest point over the ten-year period in 2022, to 0.26 million tonnes per annum - a decrease of 64% on the previous year. The downward trend has continued with sales falling 17% in 2023 and a further 4.5% in 2024.

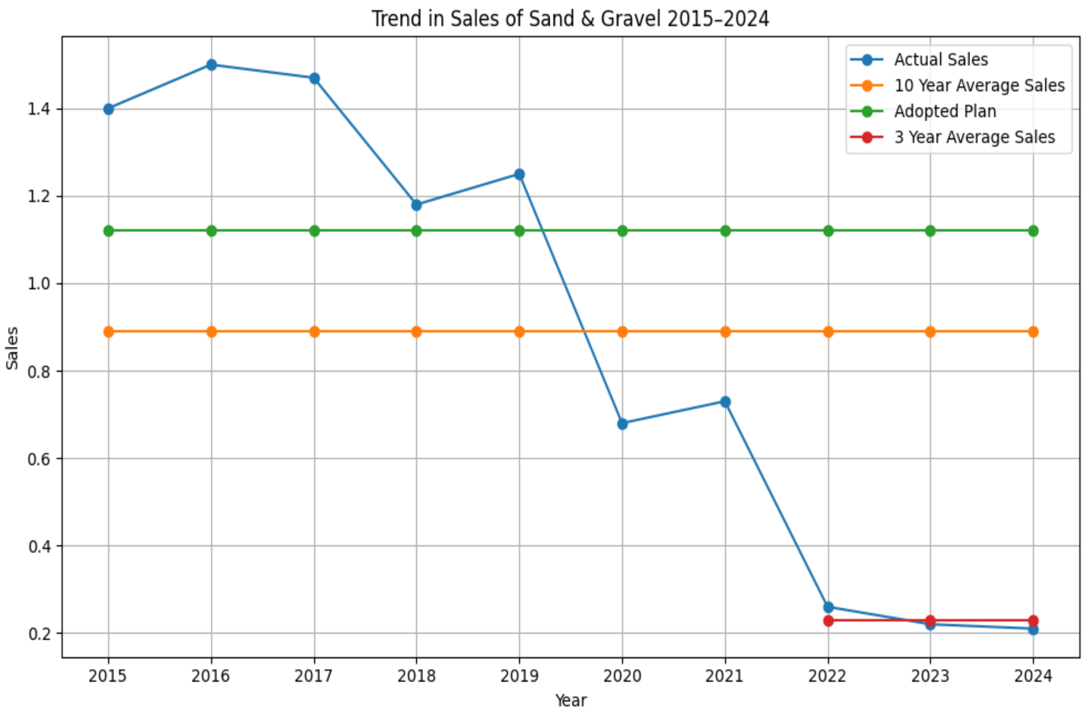
Table 2. Sales of Sand and Gravel 2015-2024.

Year	**Sales (Million tonnes)**
2015	1.4
2016	1.5
2017	1.47
2018	1.18
2019	1.25
2020	0.68
2021	0.73
2022	0.26
2023	0.22
2024	**0.21**
Average	**0.89**

Source: EMAWP Surveys

4.5. Average sand and gravel sales over the last 10 years were 0.89 million tonnes per annum. As detailed above, the national and local effects of the pandemic resulted in a dip in sales during 2020 to 2021, recovering slightly by the end of that period. Sales significantly decreased in 2022 by (64%) continuing the trend in 2023 with a 15% decrease. Sales continue to fall within Leicestershire with a further 4.5% decrease in 2024. The decrease in sales figures resulted in a fall in the average sales of sand and gravel over the past three years, to 0.23 Mtpa. This sales average falls short of the annual requirement set out in the adopted Leicestershire Minerals and Waste Local Plan 2019 (1.12 Mtpa) (see Figure 1 below). Sales for 2021 indicated a slight rebound following the effects of the pandemic. However, between 2022 and 2024 unprecedented cost pressures, higher interest rates and a stagnating national economy, including mild recessions in 2023 and 2024, resulted in a slowdown in construction activity. The MPA Regional overview of construction and mineral products markets in Great Britain (2024 Edition) correctly forecasted the decline to continue in 2024 as businesses in the construction supply chain have been negatively affected by higher cost inflation, and uncertainty in the economy and planning system, all of which have affected confidence in committing to development projects. There was stated optimism for a bounce back, beginning in 2025 if the new housing targets set out by the Labour government (elected in July 2024) were to succeed in ‘getting Britain building again’. The implementation of this would be dependent on positive investment, funding, the overcoming of skills shortages and of confidence in the housing market. A new Planning and Infrastructure Bill, introduced this year aims to “speed up and streamline the delivery of new homes and critical infrastructure, supporting delivery [by] building 1.5 million safe and decent” homes. The MPA Regional overview points to pockets of growth driven by ongoing infrastructure projects supporting demand for primary aggregates, but this has not fully offset the reduction in demand, as has been reflected in a further decline in sales in the 2024 Local Aggregate Assessment. Reduced extraction rates may also have contributed to the decline in sales.

Figure 1. Sales of Sand and Gravel 2015-2024.



Landbank

4.6. Estimated permitted reserves of sand and gravel in Leicestershire at the end of 2024 were 2.67 million tonnes. The reserves will provide sufficient permitted material to last just 2.38 years based on the average rate of sales over the last 10 years (Table 13). Using the three-year average sales figure of 0.23 million tonnes, the reserves could theoretically supply around 12 years of demand. However, as demand is forecast to rise, future average sales will likely fall between these two scenarios.

4.7. An application for an extension at Lockington Quarry (reference 2019/2358/07) has been resolved to be permitted, subject to a s106 legal agreement, releasing approximately 3.3 million tonnes of sand and gravel to be worked in six phases over a 10 year period, at a rate of 350,000 tonnes per annum. An application for a proposed new sand and gravel quarry in Quorn, Leicestershire was submitted in 2021 (reference 2021/2448/02). The application seeks planning permission for the extraction of 1.01 million tonnes of sand and gravel and remains undetermined. An application has recently been submitted for a new sand and gravel quarry at Misterton (reference 2025/00632/03) for the proposed extraction of approximately 8 million tonnes of sand and gravel. Therefore, the supply issues could be somewhat eased in coming years, taking into account the general length of the determination process.

4.8. As reported in the 2023 Local Aggregate Assessment, an application for further extraction of 900,000 tonnes of sand and gravel at Husbands Bosworth Quarry was granted planning permission in January 2023 and was included within the 2023 monitoring period. Extraction is currently progressing in line with the approved phasing plans.

Production Capacity

4.9. In 2024 existing sites had a total potential production capacity of around 1.45 million tonnes per annum, which meant that they were theoretically capable of producing sufficient material to satisfy the level of provision identified in the adopted Minerals and Waste Local Plan. However, this figure includes inactive and closed sites with the theoretical capacity for active sites 0.2Mtpa. It should also be noted that since 2021 there has been a decrease in production capacity. Table 3 below provides information on the production capacity, potential reserves and permission end dates for sand and gravel sites within Leicestershire using publicly available information. The figures contained within Table 3 are estimates only.

Table 3. Estimated Production Capacity of Sand and Gravel Sites.

Site	Status at time of publication	Production Capacity (tonnes p.a.)	Permitted Reserves* (tonnes)	Permission Ref. & end date at time of publication
Husbands Bosworth	Active	200,000*	796,282	(2021/0638/03) 10-07-2031
Shawell	Closed	0**	0	31-12-2044
Brooksby	Inactive	250,000*	1,462,000	31-12-2026 (2018/0399/06)
Lockington	Inactive	400,000	415,000	02-12-2025
Total		**0.85 Mt**	**2,673,282**	

* Publicly available information (Sourced from the latest planning application documents for each site at time of publication)
** During the 2024 monitoring period the site was active, but at the time of publication extraction has ceased and is not expected to recommence.

Exports and imports

4.10. As part of the data collection to support the production of the LAA in 2024, distribution data was requested for 2024 from all mineral operators working within Leicestershire to provide an up to date understanding of the role that Leicestershire plays in supplying aggregates to various areas. During this monitoring year there were initially two active sand and gravel operators within the County, with Husbands Bosworth coming back online after it was acquired and reopened by a new operator. The other, Shawell, was operational during this monitoring year, but has now closed. Extraction can be expected to resume at Lockington quarry, following the board resolution to grant permission for further extraction, subject to a s106 legal agreement. As detailed, there are two planning applications for sand and gravel quarries that remain undetermined (One Ash and Misterton).

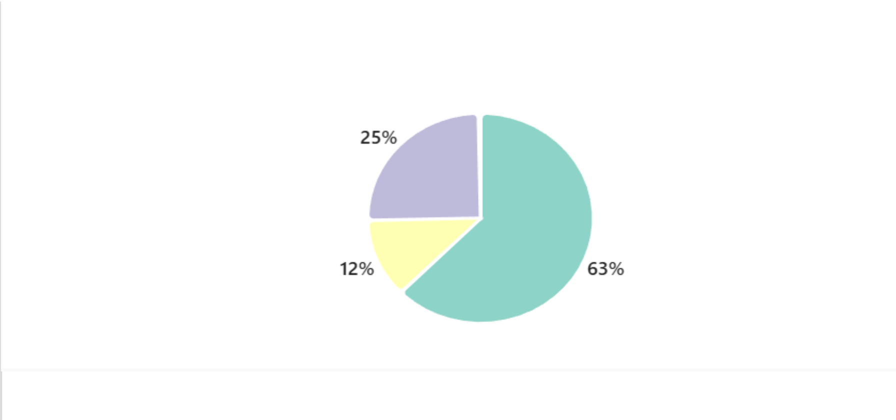
4.11. The latest Aggregates Minerals Survey was conducted in 2024, collecting data from operators within Leicestershire & Rutland for 2023. The distribution of sand and gravel from the County in 2023 is set out in Table 4 and Figure 2 below. In 2023, sand and gravel operations within Leicestershire and Rutland predominantly served local markets. 63% of sales were within Leicestershire and Rutland. The remaining material travelled to neighbouring counties within the East Midlands region (which at 0.4% is a small decrease), and ‘Elsewhere’ to other allocated regions (25.2%) with 11.3% going to unknown sales destinations. All the material was transported by road.

Table 4. Sales of sand and gravel by Leicestershire and principal destination sub-region in 2023

Destination Region	**Sales %**
Leicestershire and Rutland	63%
East Midlands*	12%
Elsewhere	25%
Unknown	-
Total	100

Source: Table 9e of the Aggregates Minerals Survey for England and Wales 2023. The East Midlands region includes the areas of Derby City Council, Derbyshire County Council, Leicester City Council, Leicestershire County Council, Lincolnshire County Council, Northamptonshire County Council, Nottingham City Council, Nottinghamshire County Council, Peak District National Park and Rutland County Council. For Info: In order to summarise the large amount of data available, the table only shows for the MPA, sales by home sub-region and remaining sales in home region (excluding home sub-region). All other allocated sales to other regions, where known, are included under ‘Elsewhere’.

Figure 2. Distribution of Sand and Gravel 2023.



4.12. Information on consumption by sub-region, as provided from the results of the 2023 AMS, indicate that Leicestershire/Rutland consumed 1,111,000 tonnes of sand and gravel in 2023, with the destination of 24,947 tonnes of sand and gravel unknown. Separate figures for Leicestershire and Rutland are not provided and separate figures for the distribution of primary aggregates to individual destinations as detailed in the 2023 survey were also not provided. Imports of sand and gravel into Leicestershire and Rutland totalled 971,000 tonnes in 2023. In comparison to 2023 where imports were at 687,000 tonnes, which is a 41% rise in imports into the sub-region (see Table 5 below). Overall, Leicestershire/Rutland continued to be a net importer of some 140,000 tonnes of sand and gravel in 2023.

Table 5. Imports and consumption of Primary Aggregates in Leicestershire and Rutland in 2023.

Imports of Primary Aggregates by Leicestershire and Rutland in 2023 (thousand tonnes)

Land-won sand and gravel	Crushed Rock	Total Primary Aggregates
971	372	1,343

Consumption of Primary Aggregates by Leicestershire and Rutland in 2023 (thousand tonnes)

Land-won sand and gravel	Crushed Rock	Total Primary Aggregates
1,111	4,934	6,045

Source: Tables 10 and 11 of the Aggregates Minerals Survey for England and Wales 2023.

Crushed Rock – Production Sites (active and inactive)

4.13. Igneous rock extraction within Leicestershire is currently taking place at five sites, namely Bardon; Cliffe Hill; Croft; Whitwick and Mountsorrel (see Table 6 below). Groby quarry is currently inactive, although coating and concrete plants are maintained. Two carboniferous limestone quarries are operational within Leicestershire at Breedon on the Hill and Cloud Hill.

Table 6. List of Active Crushed Rock Sites during 2024 monitoring period.

Site	**District**	**Mineral**
Croft Quarry	Blaby	Igneous Rock
Mountsorrel Quarry	Charnwood	Igneous Rock
Cliffe Hill Quarry	Hinckley & Bosworth	Igneous Rock
Bardon Quarry	North West Leicestershire	Igneous Rock
Whitwick Quarry	North West Leicestershire	Igneous Rock
Breedon Quarry	North West Leicestershire	Limestone
Cloud Hill Quarry	North West Leicestershire	Limestone

Sales

4.14. Sales of aggregate from crushed rock quarries within Leicestershire over the last 10 years are shown in Table 7 below. Over this ten-year period, sales of rock aggregate within the County rose to a maximum of 14.34 million tonnes in 2017. Since then, sales have fluctuated. The 2020 sales figure was 10.72 million tonnes per annum, a 23% decrease from the previous year owing to the pandemic. Since then, sales in 2021 rose to 12.28 million tonnes as markets re-opened and construction projects re-started. Following this, a drop in sales was observed in 2022 with sales dropping to 11.42 million tonnes, a drop of 7% from the previous year and falling again by 17% to 9.52 in 2023. This was the result of economic and political instability across global and national markets linked to high-cost pressures from energy, materials and labour. Sales have recovered somewhat in 2024 by 12.5% to 10.71 million tonnes, but this is still the second lowest sales figure since 2020, the year of the covid pandemic.

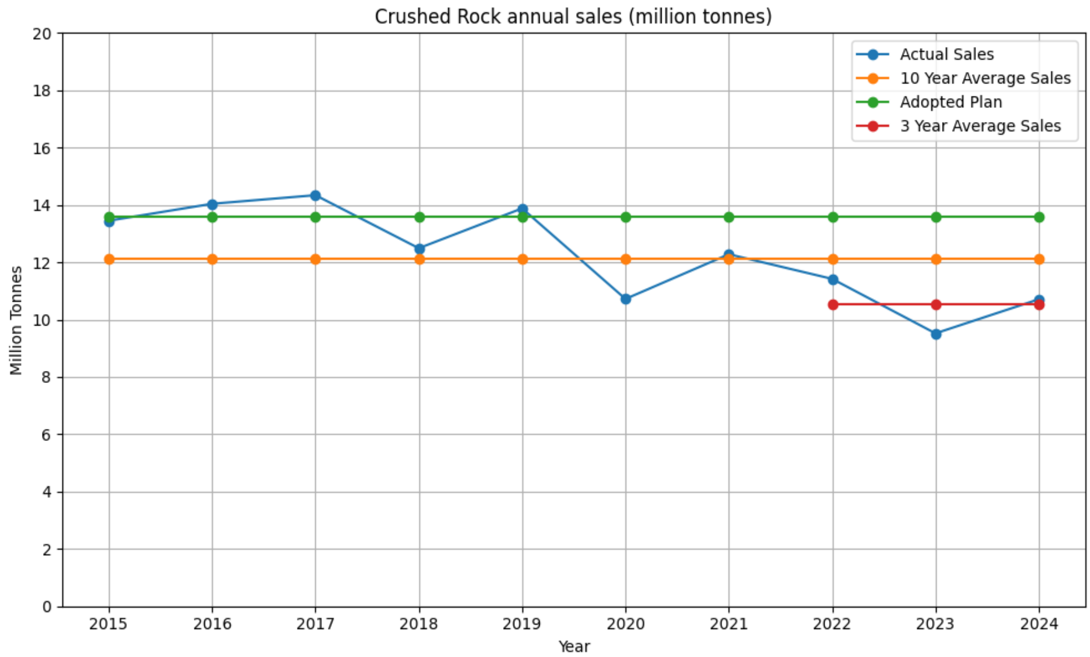
Table 7. Sales of Crushed Rock 2015-2024

Year	Sales (million tonnes)
2015	13.45
2016	14.04
2017	14.34
2018	12.49
2019	13.88
2020	10.72
2021	12.28
2022	11.42
2023	9.52
2024	**10.71**
Average	**12.14**

Source: EMAWP Surveys.

4.15. Average crushed rock sales were 12.14 million tonnes over the last 10 years. Before the impacts of the pandemic, crushed rock sales from Leicestershire in 2020 were higher than the annual requirement set out in the adopted Plan (13.6 million tonnes) (see Figure 3 below). Within the past five years, the effects of the pandemic and ongoing economic instability have been felt and sales have consistently fallen and, though there has been a recovery in this reporting period, it is only to pandemic levels, which is significantly below the annual provision set out in the Local Plan. As previously mentioned, recovery within the aggregates sector has been forecast, although the level of recovery will likely depend on the state of the UK economy, the impacts of global factors, and the success of the legislative changes currently working their way through Parliament.

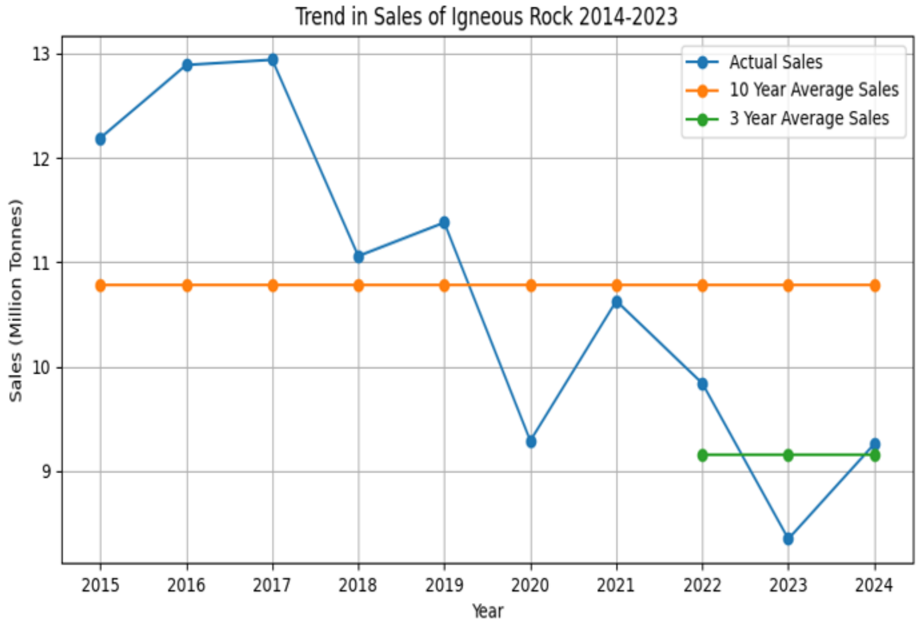
Figure 3. Sales of Crushed Rock 2015-2024.



4.16. The five active igneous rock quarries together account for approximately 65% of the igneous rock output in England. These quarries supply crushed rock aggregate of varying types, ranging from general purpose aggregate suitable for a wide range of end-uses including concrete production, to higher specification end-uses such as rail ballast and high PSV (Polished Stone Value) aggregate that is capable of being used in skid-resistant road surfacing applications. There are relatively few alternative sources of such high specification aggregate in England, making Leicestershire's role in the supply of crushed rock aggregates vital.

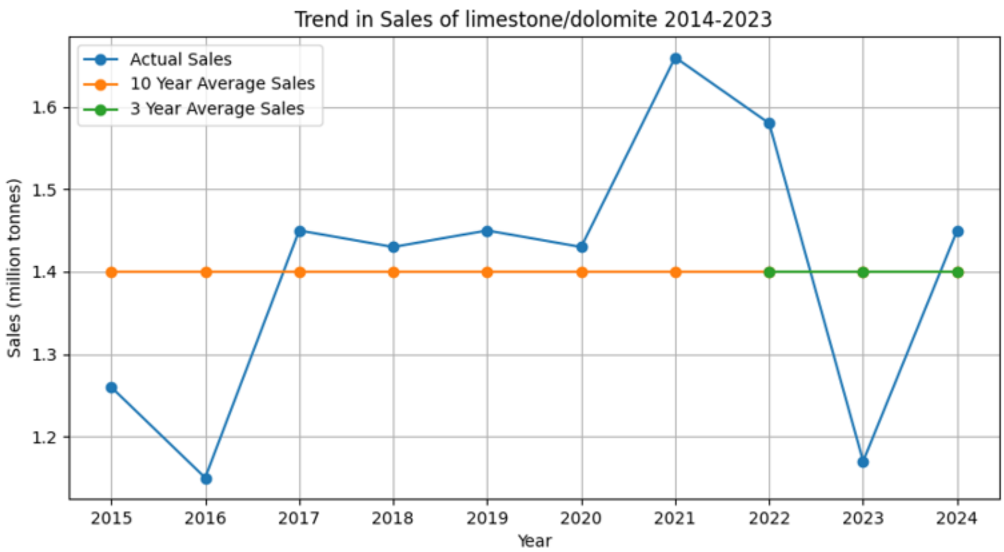
4.17. Average igneous rock sales from Leicestershire were 10.78 million tonnes per annum (Mtpa) over the last 10 years and 9.15 Mtpa over the last 3 years. Figure 4 below shows the general trend of sales of igneous rock within Leicestershire over the period 2015 to 2024. Sales were relatively steady between 2015 and 2017. In 2018 sales dropped to around 11 million tonnes before rising again marginally in 2019. In 2020 sales dropped to their lowest over the previous 10-year period, due to the covid pandemic, at 9.29 Mtpa. Sales in 2022 indicated a negligible rebound, at 9.84 Mtpa but decreased further to 8.35 Mtpa in 2023 when the economic outlook remained uncertain and the UK experienced recession in the final two quarters. Further, a fire at Mountsorrel in November 2022 impacted operations, accounting for a much lower than expected sales figures in 2023. The 2024 sales figure saw a slight rebound, but sales remain below the 10-year average of 10.78 Mtpa, although slightly above the 3-year average of 9.15 Mtpa at 9.26 Mtpa. Overall, sales in igneous rock have fluctuated over the 10-year period largely owing to various episodes of economic instability. Leicestershire continues to play a nationally important role in crushed rock supply and the overall outlook is likely to improve if national changes take effect and the industry is able to operate effectively, in spite of continued global uncertainty.

Figure 4. Sales of Igneous Rock 2015-2024.



4.18. Average limestone sales within Leicestershire were 1.40 million tonnes per annum over the last 10-year period and 1.40 million tonnes per annum over the last three-year period also. Figure 5 below shows the sales of limestone aggregate within Leicestershire over the previous 10-year period. Sales in 2021 proved to be the highest within the 10-year preceding period at 1.66 million tonnes following the pandemic. Sales in 2022 dropped by 5% to 1.58 million tonnes and by 26% in 2023 from 2022. However, in 2024 sales recovered by 24% from 2023 to 1.45 million tonnes.

Figure 5. Sales of Limestone 2014-2023.



Landbank

4.19. Confidential returns from the annual EMAWP surveys indicate that the estimated permitted reserves of crushed rock in Leicestershire as at the end of 2024 were around 276 million tonnes. This is sufficient permitted material to last approximately 22.8 years based the average rate of sales over the last 10 years (See Table 14).

4.20. Arithmetically, the level of permitted reserves for crushed rock in Leicestershire is well in excess of the 10-year minimum landbank for rock required by the NPPF. A significant proportion of the permitted reserves, however, are at inactive sites.

4.21. Table 8 sets out the production capacity of crushed rock sites within Leicestershire, sourced from the latest publicly available information rather than the data collected from the annual EMAWP survey which remains confidential for commercial reasons. For example, some of this information is sourced from the latest planning application documents for each site at the end of 2024. At the end of 2024, the five active igneous rock quarries, of which four are rail connected, had total reserves of some 262 million tonnes (see Table 8), a collective life of some 24 years based on the average rate of sales over the last 10 years. An application to extend Croft quarry was permitted in early 2022, which added an additional 6.3 million tonnes to the permitted reserves within Leicestershire. An application for extensions to Mountsorrel Quarry to release approximately 75 million tonnes of igneous rock is yet to be determined. An application to determine the release 30 million tonnes of igneous rock at Cliffe Hill quarry was permitted in July 2025, following the completion of a s106 legal agreement.

4.22. Estimated permitted reserves of limestone in Leicestershire at the end of 2024 were around 15.5 million tonnes (See Table 8). This is sufficient permitted material to last 11 years based on the average rate of sales over the last 10 years.

Crushed Rock Production Capacity

4.23. The existing active sites have the potential to produce around 13.5 million tonnes per annum, based on information contained in recent planning applications. No recent publicly available information is available on the theoretical capacity for Whitwick Quarry as the site has only recently re-opened under a previous planning permission. Therefore, the theoretical capacity for crushed rock is likely to be slightly higher than 13.5 million tonnes per annum. Existing rail-linked quarries have a capacity of around 13.5 million tonnes per annum, with two of those sites acting as principal rail-served hubs. This suggests that existing sites would be capable of producing sufficient material to satisfy the average rate of production over the last 10 years, but this would be just below the level of provision identified in the adopted Minerals and Waste Local Plan (13.6 Mt per annum). Not all of the sites would, however, would be able to continue contributing to future requirements without the benefit of extensions to their currently permitted operations. Table 8 below provides information on the productive capacity, potential reserves and permission end dates for crushed rock sites within Leicestershire (N.B. The ‘production capacity’ figures are only indicative and do not necessarily represent a maximum limit. Annual sales at some sites have exceeded that identified in planning applications).

Table 8. Estimated Production Capacity of Crushed Rock Sites

Site	**Mineral**	**Operator**	**Status**	**Production capacity*** **(tonnes p.a.)**	**Reserves***	**Permission End Date (extant permission)**
Croft	Igneous Rock	Aggregate Industries	Active	1 million	6.3 Mt	22 years following commencement (**2019/0657/01**)
Mountsorrel	Igneous Rock	Tarmac	Active	4.5 million	57.1 Mt	31-12-2040
Cliffe Hill	Igneous Rock	Midland Quarry Products	Active	4 million	19.8** Mt	31-12-2032 (**2007/1059/04**)
Bardon	Igneous Rock	Aggregate Industries	Active	4 million	81.6 Mt	31-12-2051 **(2010/0041/04)**
Groby	Igneous Rock	Midland Quarry Products	Inactive	Inactive	90 Mt	31-12-2038 (**95/1807/2 & 95/0552/4)**
Whitwick	Igneous Rock	Midland Quarry Products	Active	No recent publicly available information (site recently re-opened)	7.3 Mt	21-02-2042 **(2010/1032/07)**

Site	Mineral	Operator	Status	Production capacity* (tonnes p.a.)	Reserves*	Permission End Date (extant permission)
Breedon	Limestone	Breedon Aggregates	Active	up to 0.5 million	12 Mt	31-12-2042 (**2003-0701-07)**
Cloud Hill	Limestone	Breedon Aggregates	Active	1.5 million	1.7 Mt	31-12-2025 (**2012/0157/07)**
				Total 15.5 million	Total 276.15 million tonnes	

* Publicly available information (Sourced from the latest planning application documents for each site at the end of 2024).
** To be updated in the 2025 reporting period, following the recent permission.

Exports and imports

4.24. The Authority requested distribution data from 2021 and 2022 but was not able to obtain all the sales by destination distribution data for crushed rock from the operators as some of the operators did not have the systems in place to obtain the information requested. This information was therefore not published during this period. In 2023, directly and via BGS (British Geological Survey), sales destination information from all mineral operators working within Leicestershire was again requested to provide an up to date understanding of the role that Leicestershire plays in supplying aggregates and the information received is detailed below.

4.25. The distribution of crushed rock from Leicestershire in 2023 is set out in Table 9 below. A significant quantity (52%) of crushed rock was exported from the county. 11% of material was distributed to other authorities within the East Midlands. The main destinations for material exported beyond the East Midlands were the East of England (15% of total sales); London and the South East (10%); and the West Midlands (12%), see Figure 6.

Table 9. Sales of crushed rock by Leicestershire and principal destination sub-region in 2023.

Region	**Thousand tonnes**	**%**
Leicestershire and Rutland	4544	48
East Midlands	1081	11
South West	26	0
South East	711	7
London	246	3
East of England	1420	15
West Midlands	1122	12
North East	1	0
North West	77	1
Yorkshire & Humber	276	3
Elsewhere	7	0
Total	***9511***	100

Source: Aggregates Minerals Survey for England and Wales 2023.

Figure 6. Sales of crushed rock by Leicestershire and principal destination sub-region in 2023 (thousand tonnes). Data source: Aggregates Minerals Survey for England and Wales 2023

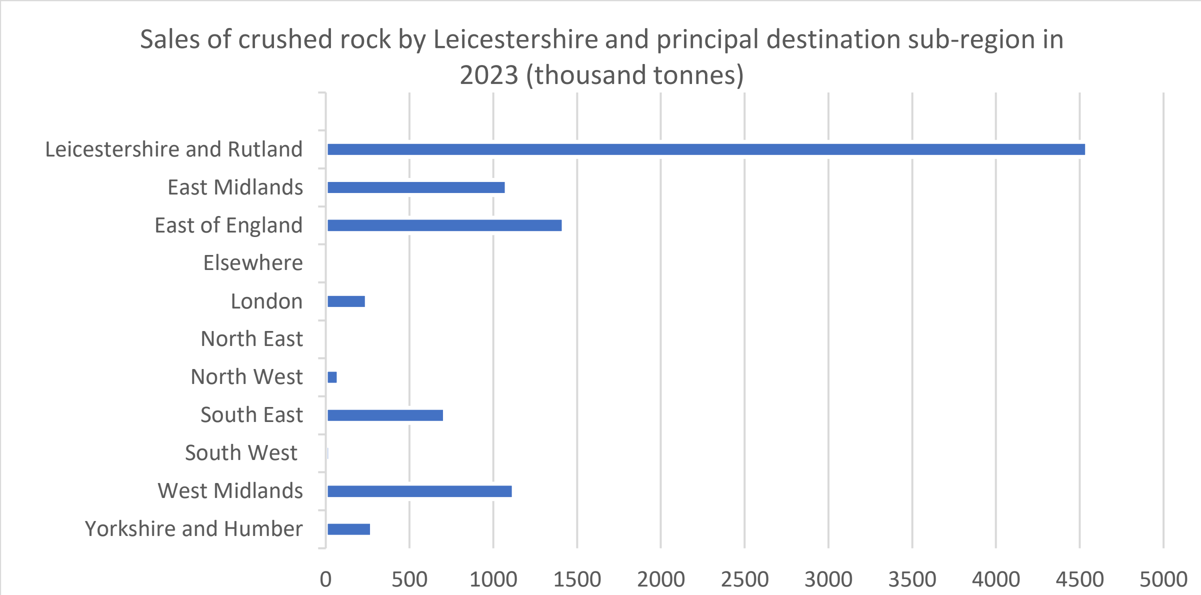
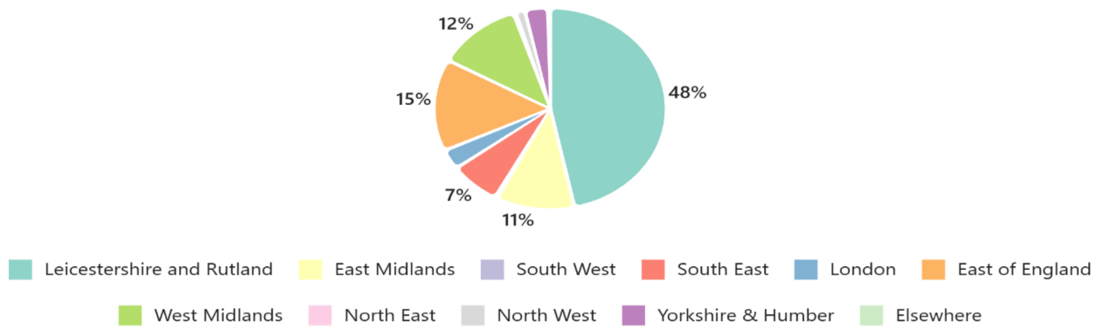


Figure 7. Sales of crushed rock by Leicestershire and principal destination sub-region in 2023 (percentage). Data source: Aggregates Minerals Survey for England and Wales 2023



5. Recycled/Secondary Aggregate

5.1. Recycled Aggregate, which includes inert materials such as concrete, stone, brick and other similar materials, are reprocessed materials previously used for construction purposes and which are often taken from the Construction, Demolition and Excavation (CD&E) waste stream. Secondary aggregates are by-products of other industrial processes and will not have been used previously as aggregates.

5.2. The use of secondary and recycled materials not only reduces the requirement for new production of primary aggregate but also reduces the need for disposal to landfill of CD&E waste materials. National Policy recognises the role of secondary and recycled materials as an alternative to primary aggregate.

5.3. Data on secondary and recycled aggregate production and use is variable and incomplete. The reason being some sites operate under license and can be monitored but much recycling and re-use occurs on individual construction sites and is temporary in nature and does not produce data. The Environment Agency's Waste Data Interrogator is used to identify the amount of CD&E waste produced and handled within each Waste Planning Authority.

5.4. At a national level, the recent Aggregates Minerals Survey for England and Wales 2023 was not confined to primary aggregates. It also collected sales data on aggregates which originate as a by-product of other quarrying operations – secondary aggregates. These principally included china clay waste and slate waste. Across England and Wales a total of 3.6 Mt of such alternative aggregates were sold in 2023, compared to 2.4 Mt in reported in the 2019 survey.

5.5. The Leicestershire Minerals and Waste Local Plan (adopted 2019) identifies and safeguards a range of waste facilities across the boroughs to maximise recycling, divert waste from landfill and create a range of 'green' jobs. It deals with all varieties of waste including construction, demolition and excavation waste (CDEW).

5.6. The information contained in the Waste Needs Assessment 2017 which supported the Local Plan states Leicestershire produces approximately 1.8 million tonnes of construction, demolition and excavation waste annually. This figure is based on estimates from national surveys. The Waste Data Interrogator identifies Leicestershire produced just over 0.9Mt of CDEW and handled nearly 1.1Mt in 2019. This remains the only available data and caution should be used when considering these figures.

5.7. The 2019 Plan forecasts a fairly constant level of growth at less than 0.6% per annum suggesting that the amount of CDEW will remain below 2 million tonnes by 2026.

5.8. Despite difficulties in obtaining reliable data (even for a single year, let alone an historic series), the National and Regional Guidelines for Aggregates Provision have set figures for "Alternative Aggregates" (aggregate materials other than land or marine won) which regions should aim to achieve. The latest Guidelines propose that the East Midlands provide some 110 million tonnes of alternative aggregates for the period 2005–2020.

5.9. Several national surveys have been conducted to measure and gain an understanding of the extent to which recycled and secondary materials have been used. The most recent study, undertaken by Capita Symonds for 2005 arisings, was published in February 2007.

5.10. Lessons learned during the earlier surveys mean that the findings of the 2005 survey were considerably more robust at regional level. However, at sub-regional level they remained unreliable. The estimate for production of recycled aggregate in Leicestershire and Rutland in 2005 was 697,252 tonnes. In addition, 60,194 tonnes of recycled soil (excluding topsoil) was produced and re-used.

5.11. There is currently no audited data available to the Council with regards to tonnages of construction, demolition and excavation (CD&E) waste arising in Leicestershire. A large proportion of construction and demolition waste is recycled on construction sites using mobile processing plant. Operational stand-alone permanent construction and demolition (C&D) recycling sites within Leicestershire are set out in Table 10 below. Existing recycling capacity for C&D waste in Leicestershire is estimated to be around 1.26 million tonnes per annum. There are currently no industrial processes in Leicestershire which are known to produce 'secondary' aggregates. The sites and facilities which produce recycled aggregates as set out in Table 10 below are safeguarded as part of the Local Plan. In 2021 planning permission was granted for a waste transfer facility at Bardon Hill Industrial Estate. The development has the capacity to produce some recycled aggregate materials through the importation and recycling of 100,000 tonnes of varying materials per annum. Additionally, in 2021 planning permission was granted for the recycling and importation, processing, storage, and sale of inert materials to supplement primary aggregate at Bardon Quarry. The development produces recycled aggregate materials through the importation and recycling of 300,000 tonnes of materials per annum. These include chemically stable, inert materials including Incinerator Bottom Ash (IBA), spent railway ballast, foundry sands and construction and demolition waste streams. Overall, there has been an increase in recycling capacity for C&D waste in Leicestershire during the 2022 monitoring period by 400,000 tonnes per annum, or 47%. Unfortunately, the Local Authority cannot provide updates for 2023 and 2024.

5.12. The Authority requested sales and processing capacity data for recycled and secondary aggregates for 2024 from all mineral operators working within Leicestershire to provide an up to date understanding of the role that Leicestershire plays in producing and supplying these materials. Unfortunately, this data was not supplied by all of the sites surveyed and so the data received is not representative, or reliable for use within this LAA.

5.13. The lack of data will make it difficult to monitor the use of secondary and recycled materials at the local level, but available evidence does not suggest that there will be any significant alteration to the proportion of supply from these sources. As outlined above, additional facilities have obtained planning permission and are now operating in line with market demand.

Table 10. List of Operational C&D Recycling Sites (as of date of publication of this report).

Site, (District)	Summary of operations
1. Bardon Hill Quarry	Recycling and importation, processing, storage and sale of inert materials to supplement primary aggregate
2. Bardon Waste Transfer Station, Interlink Way	Waste transfer recycling including C&D waste
3. Croft Quarry, Huncote (Blaby)	Recycling of inert waste materials to supplement primary aggregate use
4. Forest Road, Huncote	Inert waste recycling

Site, (District)	Summary of operations
5. Granite Close, Enderby (Blaby)	Waste transfer recycling including C&D waste
6. Enderby Road, Whetstone (Blaby)	Waste transfer recycling including C&D waste
7. Granite Way, Mountsorrel (Charnwood)	Waste transfer recycling including C&D waste
8. Ingleberry Road, Shepshed (Charnwood)	Waste transfer recycling including C&D waste
9. Mountsorrel Quarry (Charnwood)	Wash plant facility
10. Wanlip Plant Site, A46, Syston (Charnwood)	Waste transfer recycling including C&D waste
11. Gilmorton Lodge Farm (Harborough)	Waste transfer recycling including C&D waste
12. Cliffe Hill Quarry (Hinckley & Bosworth)	Recycling of waste road construction material
13. Glebe Farm, Sibson (Hinckley & Bosworth)	Recycling facility
14. Groby Quarry (Hinckley & Bosworth)	Recycling of waste road construction material
15. Lynden Lea, Hinckley (Hinckley & Bosworth)	Waste transfer recycling including C&D waste
16. Orston Lane, Bottesford (Melton)	Waste transfer recycling including C&D waste
17. Harrison Close, Wigston (Oadby & Wigston)	Waste transfer recycling including C&D waste
18. Ellistown Quarry (North West Leics.)	Inert waste materials recycling operations
19. Lockington Quarry (North West Leics.)	Inert waste materials operations recycling
20. Wiggs Farm, Wood Road, Battram (North West Leics.)	Waste transfer recycling including C&D waste

5.14. Whilst the data currently available is not considered to be suitably robust to enable a recycling target to be set for Leicestershire, the adopted Leicestershire Minerals and Waste Local Plan demonstrates strong support by the Council for aggregate recycling. Thus, the adopted Leicestershire Minerals and Waste Local Plan also indicates that the County Council will support proposals for the recycling and reprocessing of materials for use as aggregates in appropriate locations.

5.15. The general trend in respect of inert recovery is for decreasing disposals of CD&E waste to landfills, quarries and exempt facilities and an increasing diversion of waste, especially through recycling. This will lead to a greater provision of CD&E waste as recycled aggregate assisting the Council in working towards future recycled aggregate production requirements and achieving a reduction in the demand for primary aggregate. However, a recent consultation on changes to the Landfill Tax regime, published as part of the Finance Bill 2025–26, has raised concerns within the sector. Proposed revisions may affect the cost-effectiveness and availability of inert waste recovery options, and may potentially disrupt recycled aggregate supply, influencing future production strategies. This uncertainty may prompt operators to reassess investment in recycling infrastructure, alter sourcing practices, or increase reliance on primary aggregates in the short term, potentially undermining progress toward circular economy goals.

6. Future Provision

6.1. The Leicestershire Minerals and Waste Local Plan (Adopted 2019) provides an indication of the likely future provision up until 2031.

6.2. The starting point for setting a production guideline for aggregates in the LAA is to estimate demand on the basis of a rolling average of 10 years sales data (the 10-year average) before considering other relevant local information. The 10-year average is 0.89 million tonnes per annum for sand and gravel and 12.14 million tonnes per annum for crushed rock.

Sub regional apportionment

6.3. An indicator to be taken into account in identifying the level of future provision is the sub-regional apportionment derived from the National and regional guidelines for aggregates provision in England. The latest guidelines were produced to cover the period for 2005-2020 and set out the level of provision which should be made by each Region.

6.4. An annual "sub-regional apportionment" was produced from the 2005-2020 Guidelines by the East Midlands Aggregates Working Party (EMAWP). For Leicestershire, this was 1.51 million tonnes of sand and gravel and 16.6 million tonnes of crushed rock. This sub-regional apportionment is 86% higher than the 2024 sand and gravel sales figure and 35% higher than the 2024 crushed rock sales figure. It is noted that the sales figures from 2024 are not solely representative of future market demand given the ongoing effects of the economic uncertainty caused by high energy prices and global political turbulence. However, it should also be noted that the level of production outlined by the sub-regional apportionment has not been achieved in Leicestershire during the last 10 years for either sand and gravel or hard rock.

6.5. At the meeting of the East Midlands Aggregates Working Party in February 2013, doubts were expressed about the validity of the apportionment guidelines. It was considered that the figures were out of date, as they were based on aggregate output from a period of economic growth, and that they should consequently not be taken into account in identifying future levels of provision. It was agreed that future levels of provision be based on a rolling average of 10 years sales data and other relevant local information, in accordance with the NPPF.

6.6. In the Inspector's Report on the partial review of the Northamptonshire Minerals and Waste Local Plan (2013), the Inspector stated, "as they (the national guidelines) were based on production before the recession and within a different policy context, it would not be prudent to accord them very significant weight." This suggests that it would not be appropriate to base the production guideline in this LAA on the National and regional guidelines or the sub-regional apportionment.

6.7. The Inspectors report noted that the use of average sales over a 10-year period to quantify the amount of sand and gravel required over the Plan period is suitable and consistent with the approach set out in the NPPF provided that it is also based on the average of 10-year sales in addition to other relevant local information.

6.8. Previous increases in sales of sand and gravel which were seen in the years previous to 2020 and the Covid-19 pandemic, were not found to be reflective of housing construction rates within the County (see previous LAA reports for further information). Additionally, the most recent data (2023) indicates approximately 36.9% of sand and gravel production annually is exported out of the County. Therefore, sales may not necessarily correlate with economic activity within Leicestershire. Consequently, given the fall in sales during the last 3 year period for all aggregates, it is considered that using 10 years sales data when forecasting future aggregate provision is the more cautious approach and that our forecast therefore reflects the worst case scenario for mineral needs and reserves.

Comment on providing a landbank

6.9. The NPPF identifies that provision should be made for a landbank of at least seven years for sand and gravel and at least 10 years for crushed rock. National guidance does not state that plans have to allocate sites to account for a landbank at the end of the plan period. Acceptable alternative approaches are to have an enabling policy that allows unallocated sites to come forward to ensure an adequate supply is maintained should the landbank be likely to reduce below the seven (sand and gravel) or 10-year (hard rock) periods or to undertake a review of the plan. The landbank position would be monitored annually through the AMR.

6.10. Policies M1 and M4 state that the Council will ensure a steady and adequate supply of sand and gravel and crushed rock by maintaining landbanks of at least 7 and 10 years respectively. Policies M3 and M4 allow for new proposals for sand and gravel and crushed rock where, amongst other things, they are required to maintain the landbank. Therefore, adequate provision is made in the Plan, in particular by Policies M3 and M4, and subject to a statutory required review of the Plan, pursuant to the requirements of The New-Plan Making System (The Levelling Up and Regeneration Act 2023), or as considered necessary as a consequence of the AMR.

Recent trends

6.11. An average of the last three years' sales gives an indication of the most recent sales trends to identify the general trend of demand.

6.12. Average sand and gravel sales over the last three years were 0.23 million tonnes per annum, 74% lower than the 10-year average (0.89). The trend highlighted by the three-year average for sand and gravel warrants consideration of whether it would be appropriate to alter the production guideline from the 10-year average. This is considered in the text below.

6.13. Average crushed rock sales over the last three years were 10.55 million tonnes, about 13% lower than the 10-year average (12.14 million tonnes). This recent minor fluctuation in sales suggests that it is not significant enough to indicate that it would be appropriate to alter the production guideline from the 10-year average.

Local Factors

6.14. The NPPF states that the annual Local Aggregate Assessment should be based on a rolling average of 10 years' sales data and other relevant local information. In respect of the latter, the following issues have been addressed: supply and demand from neighbouring authorities; population forecasts; household projections; future house building; local economic objectives; and major infrastructure projects. The bulk of the analysis in this section focuses on Leicestershire and Leicester.

6.15. The most recent data on the distribution of sand and gravel from the County in 2023 is provided by the Aggregate minerals survey for England and Wales, 2023. In 2023, sand and gravel operations within Leicestershire and Rutland predominantly served local markets with 63% of sales within Leicestershire/Rutland, 12% within the wider East Midlands region, and 25% elsewhere, including London and the South East. Destinations were not provided for one of the two active sand and gravel quarries, and it is possible that the unknown sales were within Leicestershire or a neighbouring county. All of the sand and gravel, a total of 4.97 million tonnes was transported by road out of the East Midlands in 2019 (see Table 11 below).

Table 11. Sales of primary aggregates by principal transport method in 2023 in the East Midlands (thousand tonnes). Source: Aggregates Minerals Survey for England and Wales 2023.

Road			**Rail**		
Sand and gravel	Crushed rock	Total	Sand and gravel	Crushed Rock	Total
4,968	20,229	25,197	0	6,693	6,69

6.16. It is recognised that some sand and gravel sites within the county lie close to the border of neighbouring authorities. The AMS survey for England and Wales reported 63% of sand and gravel sales were within Leicestershire and Rutland, with 12% of sales to neighbouring authorities within the East Midlands. It is expected that unless extensions to existing sites or new sites are granted planning permission, in the medium to long term future, Leicestershire will struggle to continue to maintain a supply of sand and gravel to meet demands in neighbouring authorities. Likewise, Leicestershire will become more reliant on neighbouring authorities for sand and gravel. The Leicestershire Minerals and Waste Local Plan (up to 2031) which was adopted on the 25th of September 2019 allows for additional provision to be made from unallocated areas and extensions to existing sites, provided certain criteria are met. An application for an extension at Lockington Quarry (reference 2019/2358/07) was submitted in 2020 and has resolved to be permitted, subject to a s106 legal agreement. An application for a proposed new sand and gravel quarry in Quorn, Leicestershire (One Ash Quarry) was submitted in 2021. The application seeks planning permission for the extraction of 1.01 million tonnes of sand and gravel and remains undetermined. An application for a new quarry at Misterton has recently been received with estimated reserves of 8 million tonnes.

6.17. Notwithstanding this, the cross-boundary supply and demand of sand and gravel as well as the demand within Leicestershire will continue to be monitored through Local Aggregate Assessments, both Leicestershire's and those of neighbouring authorities and through the Local Plan review process.

6.18. Comments received during the production of the 2020 LAA raised concerns that as sand and gravel sites within the county close (as reserves run out and operations wind down) then there will be a slowdown in production to manage reserves and site closures. This in turn would affect the sales figures which would be reported within the LAA and may appear as an indicator of falling demand, where actually there may be reserve and resource shortfalls. Policy M3 allows for new sand and gravel applications outside of current Local Plan allocations, and careful consideration will be given to any sites that come forward.

6.19. A steady and adequate supply of aggregates will be crucial to enabling the level of planned housing development to be delivered. The Mineral Products Association states that the construction of a typical new house uses up to 200 tonnes of aggregates from the foundations through to the roof tiles. This is a generalisation which should be treated with a degree of caution and does not distinguish between use of sand and gravel and crushed rock and does not include any requirements for infrastructure supporting housing development or the significant amount used in maintaining or refurbishing existing housing stock. There are no figures available to indicate the level of demand other types of development might create.

6.20. Considering levels of planned housing development can provide an additional indication of whether demand for aggregates is likely to further increase or decrease. Any such relationship should be treated with some caution given the amount of mineral that is exported out of the County. Notwithstanding this, the projected demand for housing is considered below.

6.21. The HENA report replaced the Housing & Economic Development Needs Assessment (HEDNA) and was published in April 2022 and updated in June 2022. The HENA considers a range of elements including housing, demographic and economic dynamics, potential future development needs and the need for different types of homes, including affordable homes and those of different groups. The HENA includes distribution papers on Housing and Employment to provide an evidence base for addressing the issue of the redistribution of unmet needs from Leicester City.

6.22. The HENA reflected the latest calculated unmet need figures of 23 hectares of employment land and 18,700 homes to be accommodated in the Leicestershire districts. The potential distribution of housing provision across Leicester and Leicestershire over the period to 2036. However, changes to the standard method will increase the number of additional dwellings required across the county, including Leicestershire. Local Planning Authorities within the county are currently going through the Local Plan process and most have recalculated a projected housing need, in accordance with the new standard method, as part of their evidence base. Table 12 sets out the current publicly available projections below. It is projected that a total of 105,740 – 105,825 houses, depending on Hinckley & Bosworth Borough Council's final figure (see Table 12 note *) may be required over the area up to 2036 which is likely to add to an increased demand for raw materials, including sand and gravel. It should further be noted that, at the time of writing, Melton Borough Council have not published an update to the 2022 figures.

6.23. The National Planning Policy Framework (NPPF) previously required that local authorities demonstrate a rolling 5 year land supply. However, changes to the NPPF in December 2023 mean that a local authority must only meet this requirement if its Local Plan is more than 5 years old and this remains the case with the updated NPPF in December 2024, as amended in February 2025. The requirement might also be reduced if a Local Plan is in progress, e.g. it has been consulted on under Regulation 18 or 19 or has been submitted for examination (NPPF Paragraph 76). The impact of such changes has the potential to reduce demand for aggregates.

6.24. However, the election of a new Labour Government in July 2024 promised to get Britain back building, with the Planning and Infrastructure Bill 2025 currently progressing through Parliament. Key features of the Bill include the introduction of a new scheme of delegation, with fewer decisions being made by committee; the introduction of spatial development strategies across local authority boundaries and support for the regional coordination of housing and infrastructure delivery. The standard method for calculating housing need was revised in the December 2024 update to the NPPF, replacing the previous household projection-based approach and reducing reliance on heavily criticised out of date ONS data. National housing need has increased from 300,000 dwellings per annum to 370,000 per annum. The new method has been designed to shift the building of homes to less affordable areas of the country, such as London and the South East, whilst reducing uplift in more affordable areas. Local Planning Authorities (LPAs) within Leicestershire are in the process of updating their Local Plans and are at varying stages. An updated annual average housing provision has been published as part of the evidence base for each local plan draft, with the exception of Melton Borough Council, which has yet to publish an update to is housing provision figures. Table 12 has collated the information that is currently publicly available. See *** below the table for sources. The uplift to the housing provision figures across Leicestershire has increased by more than 14,000 houses since 2022 due to the change in the standard method:

Authority	Housing Provision 2020-40+	Annual Average Housing Provision
Leicester	22,015	1,295
Blaby	18,054	1,062
Charnwood	18,887	1,111
Harborough	12,291	723
Hinckley and Bosworth	11,118 - 11,203	574- 659*
Melton	5,100	~300**
NW Leicestershire	11,662	686
Oadby and Wigston	6,613	389
Leicester and Leics. Total	*105,740 – 105,825*	*6,140*

* The minimum required under the new method. The maximum being considered to meet strategic obligations and future-proof the Local Plan.

** Approximately – 300 is the last confirmed figure from 2022 and there has been no confirmed update due to the standard method update at the time of writing. An updated figure will be provided in the next Local Plan update.

*** Sources for Updated Housing Need Figures: **Hinckley and Bosworth Borough Council** – *Housing Needs Study April 2024*, HBBC. https://www.hinckley-bosworth.gov.uk/download/downloads/id/8310/housing_needs_study_april_2024.pdf; **Blaby District Council** – *Affordable Housing Scrutiny Report July 2022*, Blaby DC. https://democracy.blaby.gov.uk/documents/s47250/Appendix%20A%20-%20Live%20Scrutiny%20Working%20Group%20Affordable%20Housing%20Report.pdf; **Melton Borough Council** – *Affordable Housing Development Plan 2022–2026*, Melton BC. https://www.melton.gov.uk/media/dpujvays/affordable-housing-development-plan-2022-2026-1.pdf; **North West Leicestershire District Council** – *Local Plan Committee Report May 2024*, NWLDC. https://minutes-1.nwleics.gov.uk/documents/s44142/Housing%20and%20Employment%20land%20update%20Local%20Plan%20Committee%20Report.pdf; **Oadby and Wigston Borough Council** – *Local Housing Need Consultation Leaflet Summer 2025*, OWBC. https://www.oadby-wigston.gov.uk/files/documents/local_housing_need_consultation_leaflet_summer_2025/Local%20Housing%20Need%20Consultation%20Leaflet%20-%20Summer%2025.pdf;

6.25. The Midlands Engine Strategy was published in March 2017 by the previous Conservative government. It set out Local Growth Fund investment which allocated £25.87 million to the Leicester and Leicestershire LEP. However, LEPs were formally abolished by the previous Conservative government in the Spring of 2023, with LEP functions transferred back to local authorities and the withdrawal of funds previously allocated. The Labour government published a 10-year infrastructure strategy in June 2025. (*UK Infrastructure: A 10 Year Strategy),* outlining the Government's long-term plan for economic, housing, and social infrastructure, pledging £725 billion in funding over the next decade. Further, the National Wealth Fund has been created as a replacement for the UK Infrastructure Bank, with strategic priorities having been published in March 2025, including £27.8 billion public capital, aiming to mobilise £70 billion in private investment. The Local Aggregate Assessment will continue to monitor progress and whether there is an impact on demand for aggregates.

6.26. In January 2012, the Government announced its decision to proceed with a £32.7 billion national High-Speed Rail network (High Speed Two) from London to Birmingham, continuing onto Manchester and Leeds. However, the construction of Phase 2 from the West Midlands to Manchester and East Midlands Parkway was scrapped by the previous Conservative government in October 2023 which will negatively impact the projected sales of aggregates that would have resulted from the project. Although there has been a reset to the HS2 project under the Labour government, the West Midlands to Manchester and East Midlands Parkway has been formally cancelled.

6.27. Recent LAAs have reported progress on the application to the Secretary of State for a Development Consent Order for the Hinckley National Rail Freight Interchange (HNRFI) at junction 2 of the M69, within the district of Blaby, Leicestershire. The scheme was deemed a Nationally Significant Infrastructure Project and given its scale it was considered that the project would result in a greater than local impact on aggregate demand in the short to medium term. However, the proposal was formally refused by the Secretary of State for Transport on 10 March 2025.

6.28. A formal application to the Secretary of State for a Development Consent Order was also submitted on 22 January 2024, requesting that the Secretary of State directs that the proposed East Midlands Freeport – East Midlands Gateway Phase 2 be treated as development of national significance. Having considered the details the Secretary of State gave their view that the Proposed Project by itself is nationally significant as it would be likely to have significant economic impact and be important in driving growth in the economy; The economic impact will have an impact on an area wider than a single local authority area and would contribute to delivering the outcomes of the Freeport. The East Midlands Freeport – East Midlands Gateway Phase 2 (EMG2) is currently in the pre-application stage for a Development Consent Order (DCO), with the formal application expected to be submitted in 2025.

6.29. The STEP Fusion project in Nottinghamshire is aiming to build a prototype fusion power plant by 2040 and is, at the time of writing, in a public consultation period. It promises to act as a significant catalyst for growth and regeneration for the communities surrounding West Burton and will have implications for the provision of minerals within the region. As a significant regional and national provider of crushed rock, Leicestershire's quarrying operations are likely to have a key part to play in contributing to the project's construction.

6.30. Information collated in the British Geological Society's Aggregate Minerals Survey (AMS) for Great Britain showed that total sales decreased by about 2% between 2019 (168.9 Mt) and 2023 (164.9 Mt in Great Britain, and by about 3% in England and Wales) with land-won sand and gravel showing the largest decrease (10%) from 40.9 Mt in 2019 to 36.7 Mt in 2023. Sales of crushed rock decreased (4%) from 95.8 Mt in 2019 to 92.1 Mt in 2023. However, though sales of sand and gravel remain low, local factors referenced above suggest that there may be a retained demand for sand and gravel from Leicestershire operations. Sales data from between 2020 and 2022 was significantly impacted by the impact of the effects of pandemic and global and national economic turbulence, and this has continued, though there has been a slight bounce back in the sales of crushed rock. Additionally, those sites which became dormant and were not yet replaced by extension to existing sites or new sites becoming active have also resulted in a downturn in sales. This does not necessarily indicate a lack of demand; indeed, net imports of primary aggregates into England from Wales increased from 3.5 Mt in 2019 to 3.8 Mt in 2023. As a consuming region, the East Midlands (18.9 Mt) was one of the largest consumers, which indicates ongoing demand. The next Aggregates Minerals Survey is due to be undertaken in 2027.

6.31. Outside the scope of this report, planning applications remain to be determined for additional sand and gravel quarry extraction at Quorn (One Ash Quarry) and Misterton. Further to this, an application for further extraction at Lockington has been resolved to grant permission to extract a further 3.3 million tonnes of sand and gravel, subject to s106 agreement.

6.32. Whilst several live planning applications remain outstanding; there continues to be concerns regarding the provision of further sand and gravel resources. This is witnessed by the low landbank and the limited number of sites allocated in the adopted Leicestershire Minerals and Waste Local Plan which resulted from a lack of sites being put forward by industry during the submission stage. Future sales may consequently be influenced by mineral reserve continuity at individual quarry sites. The implications of the Covid-19 pandemic and ongoing economic instability are noted and considered. However, whilst sales figures have dropped, it is considered that the economy may rebound as global and national markets stabilise over the coming years. That said, with increasing global political turbulence, uncertainty following recent government elections, and with continuing conflicts in Ukraine and the Middle East, forecasting the economic outlook remains challenging. As such, the Local Aggregates Assessment for the monitoring period of 2024 will continue to address the ongoing impact on the aggregate industry. Given the drop in sales since 2020, skewing the three-year average sales figure of sand and gravel to its lowest ever figure (0.23 Mtpa), it is considered appropriate for the production guidelines identified by this Local Aggregates Assessment to reflect the 10-year sales average, namely 0.89 million tonnes per annum. It is considered that this would better reflect the cautious expectation that the economy will rebound and planned local and national housing and infrastructure construction projects will continue as previously planned.

6.33. The national importance of Leicestershire's role as a supplier of crushed rock means that it is likely that the County's rock quarries will continue to supply materials for major infrastructure both in the East Midlands and elsewhere in England. The scale of any potential increase in demand is uncertain and will largely depend on the rate of future growth in the national and local economy. The implications of the Covid-19 pandemic and instability of global and national markets are noted and considered. Whilst the UK has seen economic decline as a result of the pandemic and following economic decline, it has been projected that the market may rebound as a result of demand for planned construction projects from late 2025. Indeed, increased house building targets of 1.5 million new homes over the course of the current parliament and the legislation currently progressing through Parliament and the bodies now put in place to implement the necessary investment will have an impact on demand for crushed rock from Leicestershire and the potential for earlier than forecasted depletion of reserves. In the 2023 LAA it was mentioned that the South East, a key export market for Leicestershire crushed rock, required an extra 7,116 homes (excluding London) above existing targets are to be built. With changes to the standard method having been introduced, this figure is likely to be significantly higher. The new method calculates housing need based on a baseline tied to existing stock, a stronger affordability multiplier, and a removal of the previous cap and urban uplift which was seen to disproportionately affect rural and suburban areas. Using information on the potential revised housing need across the region calculated by DHA Planning, the largest independent planning and highways consultancy in the South East, an average 57% increase in housing need is feasible. This could result an increase from an additional 7000+ additional dwellings to approximately 11,000+, depending on the outcome of individual Local Plans[1]. Ongoing Local Aggregate Assessments will continue to monitor and address the impact on the aggregate industry. Overall, it is not considered there is sufficient robust evidence to support a specific level of production above the 10-year average of sales. The production guidelines identified by this Local Aggregates Assessment therefore reflect the 10-year sales average, namely 12.14 million tonnes per annum.

Sand and Gravel Provision

6.34. Table 13 below provides revised calculations of the potential future requirement for sand and gravel within Leicestershire based on average sales over the last 10 years. The calculations are based on making provision for the period up to 2031. The calculations take account of the level of permitted reserves on 31st December 2024.

Table 13. Calculation of Sand and Gravel Provision 2024 – 2031

Calculation		**Million Tonnes**
A	Annual Requirement	0.89
B	Total Requirement 2024-2031*	6.23
C	Total permitted reserves at 31/12/2024	2.67
D (C-B)	Shortfall 2024 – 2031	3.56

*Total Requirement = **A** x 7 years (to cover the period from 31st December 2024 until 31st December 2031).

6.36. The table indicates that there will be a shortfall of sand and gravel reserves over the period to 2031 of some 3.56 million tonnes. The Leicestershire Minerals and Waste Local Plan includes proposals for the extension of sand and gravel operations in the County. Whilst Shawell Quarry would ordinarily be included within the monitoring period, given it was active during 2024 monitoring year, it has been removed here owing to the fact that we know the site has closed indefinitely, and this allows an up to date picture to be presented. The former Cadeby Quarry has been removed from the 2024 monitoring period as the site has now been restored. An application for a new sand and gravel quarry near Misterton has recently been received and is under consideration. The site is being proposed as a direct replacement for Shawell, proposing the extraction of approximately 8 million tonnes of saleable sand and gravel with an average annual rate

[1] Source: DHA Planning - South-East England Change In Housing Need Method

of approximately 400,000 tones, which the operator envisages being recovered over a twenty-year period, starting in 2025. At present, the application remains undetermined.

6.35. The Plan also provides for planning permission to be granted for sand and gravel outside unallocated areas under Policy M3: Sand and Gravel Extraction (Unallocated Areas). In 2019 a planning application was submitted for the extraction of 3.3 million tonnes of sand and gravel at Lockington Quarry, this application was resolved to be granted by the Development Control Regulatory Board in April 2025, subject to the completion of a s106 legal agreement. Additionally, an application for a proposed new sand and gravel quarry in Quorn, Leicestershire (reference 2021/2448/02) was submitted in 2021. The application seeks planning permission for the extraction of 1.01 million tonnes of sand and gravel and remains undetermined.

Crushed Rock Provision

6.36. The Leicestershire Minerals and Waste Local Plan indicates there would be more than sufficient crushed rock reserves to meet requirements over the period to 2031. It was not therefore considered necessary to make specific provision for future rock extraction.

6.37. Table 14 below provides updated calculations of the potential future requirement for crushed rock from Leicestershire based on average sales over the last 10 years. The calculations are based on making provision for the period up to 2031. The calculations take account of the level of permitted reserves as of 31st December 2024.

Table 14. Calculation of Crushed Rock (Aggregate) Provision 2024-2031.

Calculation		**Million Tonnes**
A	Annual Requirement	12.14
B	Total Requirement 2024-2031*	84.98
C	Total permitted reserves, excluding reserves in dormant sites, at 31/12/2023	276.15
D (C-B)	Surplus 2023 – 2031	191.17

*Total Requirement = **A** x 7 years (to cover the period from 31st December 2024 until 31st December 2031).

6.38. The table indicates that there will be more than sufficient crushed rock reserves to meet requirements up to 2031. The current level of permitted reserves is also sufficient to maintain a landbank of 10 years throughout the period to 2031, with a surplus of 191.17 million tonnes. This surplus demonstrates that any impact on demand for crushed rock in the short to medium term would be able to be met, as it is unlikely that additional demand would outstretch the current surplus. However, only Bardon and Croft quarries currently have permissions that extend beyond 2042, so new permissions are likely required to meet long term demand.

6.39. Whilst the theoretical permitted reserves of igneous rock appear to be adequate, technical considerations led the East Midlands Aggregates Working Party (EMAWP) to express concern in 2018 regarding the medium to long term ability of Leicestershire to supply crushed rock, at existing levels, particularly to areas like the South East and London via rail. The EMAWP advocated that action be taken to address concerns over medium to long term future supplies of igneous rock from Leicestershire, bearing in mind the nationally strategic and uncertain nature of the Leicestershire resources beyond the existing permissions. In 2023 817,000 tonnes of crushed rock were exported out of the East Midlands via rail. However, only two of the four rail-linked quarries reported crushed rock exported by rail figures. Cliffe Hill dispatches approximately 30% by rail, through figures formally reported in the latest AMS survey.

6.40. This situation has also been recognised in a report from the British Geological Survey ('An evidence-based approach to predicting the future supply of aggregate resources in England' 2011) which concluded that "by far the most important foreseeable shortfall in the medium to long-term is amongst the four rail-connected igneous quarries in Leicestershire."

6.41. The current strategy for aggregate minerals, set out in Policy M4 (Crushed Rock) of the Leicestershire Minerals and Waste Local Plan, is to ensure a steady and adequate supply of crushed rock for aggregate purposes by giving priority to proposals for extraction to be worked as extensions to existing rail-linked site operations where they are required to ensure sustainable supply and allowing proposals for new extraction sites where it has been demonstrated that the landbank and production capacity cannot be maintained from existing permitted sites. The Authority continues to rely upon operators to come forward with proposals to ensure the medium-long term supply of crushed rock. In line with this approach, the 2025 Local Aggregate Assessment (reporting 2024 data) confirms Leicestershire's nationally significant hard-rock role. Leicestershire has four principal rail-linked quarries, Mountsorrel, Croft Quarry, Cliffe Hill Quarry and Bardon Hill, which are available for use for the sustained long-distance distribution of crushed rock.

6.42. In August 2011, Leicestershire County Council granted planning permission for the extraction of 132 million tonnes of mineral from an area adjacent to Bardon Hill Quarry. This has extended the life of the quarry by around 40 years. The stone extracted at the quarry has a high PSV (60), enabling the aggregates to be used more extensively in road surfacing applications, as well as in other asphalt products, concrete and other uses.

6.43. Planning permission was granted in October 2015 for the extraction of an additional 20 million tonnes of mineral from an extension to Mountsorrel Quarry. This has extended the life of the quarry to 2040. A planning application for lateral extensions to Mountsorrel Quarry was submitted in September 2023 to release a further 75 million tonnes of crushed rock aggregate and building stone products. Yet to be determined, the proposed development seeks northerly and south-easterly extensions of quarry working sufficient to release approximately 75 million tonnes of granite. Combined with consented mineral reserve, the development would extend the working life of the quarry by 18 years beyond the extant permitted mineral cessation date of 31 December 2040. The proposed development would extend the quarry life to 2058. Planning permission was granted in

January 2022 (reference 2019/0657/01) for the lateral extension of mineral extraction within Croft Quarry releasing an additional 6.3 million tonnes of hard rock over 17 years. Production would be up to 1 million tonnes per annum (tpa), which would take up to 10 years to extract.

6.44. Planning permission at the rail-linked Cliffe Hill Quarry had been due to expire at the end of 2032. However, a planning application for a lateral extension to the existing workings at Cliffe Hill Quarry was granted on 30th July 2025 (reference 2022/10125/04 & 2022/01384/07) . This permission grants the continuation of quarry workings to 31st December 2042. Existing processing and rail exporting infrastructure are retained and operations on the site will release an additional 30 million tonnes of reserves.

6.45. During the consultation process undertaken in the production of the previous LAA (for the 2023 monitoring period), concerns were raised that exports of crushed rock from Leicestershire to London and the south-east which are nationally significant could rise over the next five years and that this could impact long term reserves of crushed rock within the County. As commented in the 2023 report, it is difficult to quantify whether exports to London and the south-east will increase as this will largely depend on future economic conditions, which are no less volatile than they were at this point last year. However, the LAA is reviewed annually, and an Authority Monitoring Report is prepared by the County Council to monitor the effectiveness of the Local Plan.

6.46. Additionally, the recent determination of the application at Cliffe Hill Quarry, and future determination of the Mountsorrel application, demonstrates that the policy environment is working effectively in that it has allowed proposals to come forward where required by operators and industry demand. It is understood that the complexity of such proposals, which result from not only the nature, but the sheer size of them, can lead to delays where consideration of the planning balance and environmental considerations take a significant amount of time. However, these proposals have come forward to the Authority ahead of reserves dwindling which demonstrates the successful forward-planning of such operators in addressing these situations.

6.47. The bringing forward of these proposals demonstrates that the policies in place successfully allow for additional provision to be made from unallocated areas and extensions to existing sites provided certain criteria are met.

6.48. During the consultation process undertaken as part of part of the previous LAA, concerns were raised that sand and gravel use within the County may be substituted by crushed rock should demand for sand and gravel outstrip supply and this will continue to be a concern. It is recognised that to some extent crushed rock can be used as an alternative to sand and gravel for some uses. The low landbank for sand and gravel within Leicestershire has been recognised within recent years and was addressed through the call for sites as part of the Leicestershire Minerals and Waste Plan (Adopted 2019). Additionally, this has been addressed similarly to crushed rock, through the use of flexible policies that allow sand and gravel sites in unallocated areas to come forward subject to environmental constraints and indeed the site of Misterton has now come forward, which would more than cover the projected shortfall for the plan period, with a proposed extraction of 8 million tonnes of saleable sand and gravel.

6.49. As noted in previous LAAs, if production at any of the existing active sites cannot be maintained, it may be possible to use production capacity at sites that are currently inactive in order to maintain the level of provision from quarries within Leicestershire. However, the inactive site of Groby within the County is not rail-connected and does not have a realistic prospect of being linked by rail given its locality.

7. Conclusion

7.1 The provision of sand and gravel is the biggest issue for Leicestershire and Rutland over the plan period with a fall in the 10-year sales average from 1.12 million tonnes in 2015 to 0.89 million tonnes in 2024. There are both local and national reasons for the decline in sales over this period. During the monitoring period there remained only two active sand and gravel sites within the county, one of which has since ceased extraction and permanently closed. In 2015 there were five sites active with an estimated 6.96 million tonnes of permitted reserves. At the time of writing there is an estimated 2.67 million tonnes, but the one remaining active site of Husbands Bosworth accounts for under 800,000. Permission has been a granted at an existing currently inactive site (Lockington Quarry), during this reporting period, however further permissions will be required to increase and retain a steady supply. As a percentage of total sales exported from the region, the last 4-yearly Annual Monitoring Survey (AMS) (2020-2023) reported that 36.9% of land won sand and gravel was exported from Leicestershire. In the 2015 Local Aggregate Assessment, the reported sales export figure was 42.2%, so as a percentage of sand and gravel extractions within Leicestershire, exports have decreased by around 5%.

7.2 The national picture has continued to be one of disruption and uncertainty. There have been 2-3 major UK recessions since 2015; the Covid 19 pandemic and resulting recession, which included the shutting down of construction, business closures and nationwide lockdowns, leading to the steepest quarterly drop in GDP in UK history at 188%; the post covid 19 economic stagnation and recession of Q3 and Q4 of 2023, characterised by low productivity growth, poor infrastructure investment and economic conditions exacerbated by the delayed effects of Brexit; and an ongoing fiscal drag that culminated in an ongoing sustained inflation and a resulting cost of living crisis, and the continued effects of Brexit, including higher tariffs and loss of foreign direct investment. As things stand, it is believed that the UK will avoid another near future recession but the outlook remains uncertain. Applications at One Ash and Misterton are in the process of being determined, in addition to the recent granting of permission at Husbands Bosworth and Lockington, subject to a s106 agreement. Policy M3 of the Leicestershire Minerals and Waste Local Plan allows for further sites to come forward for consideration but the planning process for minerals sites is generally lengthy, which can have implications for construction and infrastructure project lead in times.

7.3 Economic instability has likewise had an impact on crushed rock sales with the 10 year average sales figure falling below the figure set out in the adopted Local Plan. Leicestershire has a landbank of approximately 22.8 years and recovery is tentatively anticipated within the construction sector from late 2025 onwards which could impact the landbank figure in future calculations. Further, the current Local Plan period runs until 2031 but only two of the active crushed rock quarries within the county have permissions beyond 2042. Therefore, depending on what applications are submitted and granted over the plan period there may be a need to look long-term at where new permissions might come forward to ensure that Leicestershire, as a nationally significant minerals provider, can continue to provide an adequate supply of minerals beyond 2042. We continue to live through uncertain times and this looks set to continue. Further changes to economic policy and to the planning system by the Labour government, continuing national and global economic instability, ongoing wars and the increasing effects of climate change events could cause further disruption to demand within the aggregates and construction industries, and to demand and supply factors within those sectors connected to them.