

Milton Keynes Local Aggregates Assessment 2024



Contents

Executive Summary	3
Sand and gravel.....	5
Crushed rock (limestone).....	6
Secondary and recycled aggregate	6
Introduction	7
Data limitations	7
Aggregate supply and demand	11
Geology.....	11
Sand and gravel.....	14
Limestone	17
Secondary and recycled aggregate	17
Future aggregate supply	19
Aggregate provision	19
Sand and gravel.....	19
Limestone	21
Secondary and recycled aggregate	21
Landbanks	21
Consideration of local circumstance.....	22
Demand for sand and gravel.....	22
Supply of sand and gravel.....	25
Summary.....	26

Executive Summary

Summary – Milton Keynes (for the calendar year 2024)									
Quarry Sales	2024 Sales (Mt) & Comparison to previous year	Average (10-yr) Sales & Trend	Average (3-yr) Sales & Trend	Aggregate Provision Rate (Mt)	Reserve (Mt)	Landbank (years)	Allocations (years)	Capacity (Mtpa)	Comments
Soft Sand									
Sharp Sand & Gravel									
All Sand & Gravel ⁴	C ↓	0.163 ↑	0.174 ↓	0.17	C	<1	8	N/A	There was only one active sand and gravel quarry during 2024. Therefore, sales and reserve data for individual years is confidential.

General Comments

Supply contribution of sand and gravel sites is limited with insufficient permitted reserves to maintain a 7 year landbank. To address shortfall there are two remaining sites allocated in the Minerals Local Plan, potentially adding up to 1.18 Mt to the supply. The area has a history of not meeting the sand and gravel landbank target due to a limited number of sites coming forwards. However, we will be working to increase this in due course through preparation of a new Minerals and Waste Local Plan. The details and timeline of this are to be confirmed after Government publishes new plan-making regulations.

Aggregate Infrastructure Sales	2024 Sales (Mt) & Comparison to previous year	Average (10-yr) Sales (Mtpa) & Trend	Average (3-yr) Sales (Mtpa) & Trend	Aggregate Provision Rate (Mt)	Reserve (Mt)	Landbank (years)	Allocations (years)	Capacity (Mtpa)	Comments
Recycled / Secondary Aggregates	C ↓	0.034 ↓	0.05 ↓	N/A				0.05	There is one recycled aggregate (RA) facility operational in the authority area. There is zero capacity for producing secondary aggregates. The Smith Aggregates Recycling Centre (ARC) at Lathbury has a maximum annual capacity of 50,000 tonnes per annum.
Rail Depot Sales (Sand & Gravel)	C ↓	0.04 ↑	0.05 ↓	N/A				0.4	There is only one rail depot therefore yearly sales figures are confidential.
Rail Depot Sales (Crushed Rock)	C ↓	0.26 ↑	0.27 ↓	N/A					

The National Planning Policy Framework (NPPF) requires Mineral Planning Authorities (MPAs) to plan for a steady and adequate supply of aggregates by preparing an annual Local Aggregates Assessment (LAA). The LAA is required to:

- forecast the demand for aggregates based on a rolling average of ten years' sales data and other relevant local information,
- analyse all aggregate supply options, and
- assess the balance between demand and supply.

The authority area currently has an adopted [Minerals Local Plan](#), which was adopted on 1 July 2017. This guides how and where minerals related development should take place within Milton Keynes.

This LAA is the 2025 edition and includes the most recent (2024) aggregate sales and reserves data for Milton Keynes. The ten-year period covered by this LAA is 2015 up to 2024. The main facts and figures from the report (by aggregate type) are set out below.

Sand and gravel

- Milton Keynes has one permitted sand and gravel site. At the time of writing, no sales and/or reserves data has been provided by the operator. On this basis, sales in 2024 have been estimated using the 10-year sales average. Estimated permitted reserves are however known to be limited.
- Sales have fluctuated greatly over the last ten years. Most recently, sales between 2020 and 2021 increased by 300%. This is likely due to sales being artificially low in 2020 due to the Covid-19 pandemic. Sales decreased slightly between 2022 and 2023, by 44%. Actual sales figures cannot be identified for confidentiality reasons.
- In 2024, Milton Keynes was a net importer of sand and gravel.
- The Milton Keynes Minerals Local Plan (MLP) sand and gravel provision rate is 0.17 million tonnes per annum (Mtpa). It is based on the 2010-2012 3-year average sales and local factors affecting the supply and demand for sand and gravel. Average aggregate sales for the most recent ten-year period (2015 - 2024) and 3-year period (2022 - 2024) are 0.163 Mtpa and 0.174 Mtpa respectively.
- Currently the supply contribution of sand and gravel sites in the authority area is limited. Based on the MLP provision rate there are insufficient permitted reserves to maintain a 7-year landbank, as required by national policy. To address this, two outstanding site allocations exist for sand and gravel extraction in the MLP which, subject to planning permission, have the potential to increase the landbank further. We will also be updating our Minerals and Waste Local Plans which will provide an opportunity to allocate additional sites. We will share precise timeframes for this with stakeholders in due course after Government publishes details of proposed planmaking reforms.
- On this basis it is considered appropriate that the Aggregate Provision Rate (APR) to be used in decision-making should remain 0.17 Mtpa, the same as in the adopted MLP.

Crushed rock (limestone)

- Milton Keynes does not have any significant crushed rock resources. There have been no sales of locally extracted limestone for aggregate purposes for at least the last fifteen years and there are currently no permitted sites.
- No annual apportionment/provision rate has previously been identified for limestone and this is still not considered appropriate.
- In 2019 imports of crushed rock into the Milton Keynes - Buckinghamshire sub-region totalled 0.704Mt. As Milton Keynes does not produce crushed rock, it is a net importer.
- Over the past 10 years, crushed rock imports to the Cemex rail depot at Bletchley have averaged 0.26Mt per annum with a general upwards trend during that time. However, imports have reduced over the past 3 years.

Secondary and recycled aggregate

- Milton Keynes currently has one aggregate recycling facility, operated by Smith Construction Group Limited at a site on Sherington Road to the north of Lathbury. There is a lack of consistent sales data available for this site, and historically in Milton Keynes. It is therefore not considered necessary (nor possible) to determine an annual APR for secondary and recycled aggregates.

Introduction

The National Planning Policy Framework (NPPF) sets out the requirement for Mineral Planning Authorities (MPAs) to prepare an annual Local Aggregates Assessment (LAA) to plan for a steady and adequate supply of aggregates. The LAA is required to assess the demand for, and supply of, aggregates in the MPA's area covering:

- A forecast of the demand for aggregates based on the rolling average of ten years sales data and other relevant local information; and
- 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 England's Economic Heartland; 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.

This LAA details the current and future situation in the MPA area of Milton Keynes in terms of aggregate supply and demand including sales data, imports and exports and aggregate provision rates to 2024. It considers how local circumstances may impact on future aggregate supply and demand. The LAA is updated on an annual basis and will enable the Council to monitor trends in aggregate provision and assess the effectiveness of MLP policies including Policy 1: Providing for sand and gravel. This LAA is the 2025 edition and includes the most recent (2024) aggregate sales and reserves data for Milton Keynes.

The LAA is submitted to the South East England Aggregates Working Party (SEEAWP), an advisory body made up of MPAs and industry representatives across the region, for consideration and scrutiny. The AWP has a role to monitor the operation of the Managed Aggregate Supply System (MASS) through providing technical advice, particularly on supply provision.

Data limitations

Milton Keynes is a small MPA with a limited number of quarries. This year, because there is only one active quarry in the city, it is not possible to publish annual sales or reserve figures for reasons of commercial confidentiality. Notwithstanding this, 3- and 10-year sales averages can be published. We also have not received 2024 annual sales data from the operator. The 10-year sales data has been used as a proxy for sales in the absence of this data. For consistency, the 10-year sales figure has also been used in the SEEAWP Annual Report.

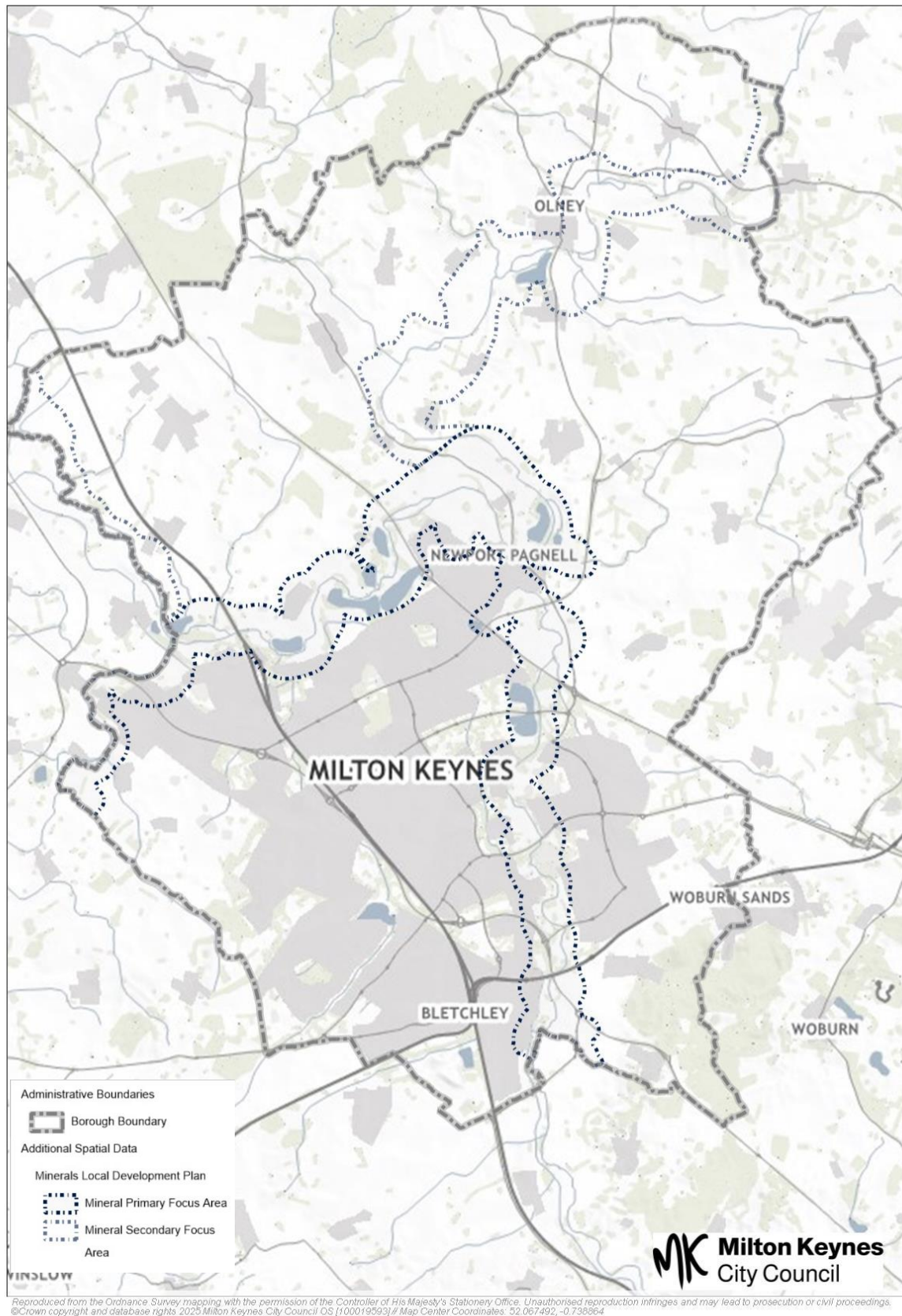


Figure 1: Map of Primary and Secondary Mineral Focus Areas in Milton Keynes.

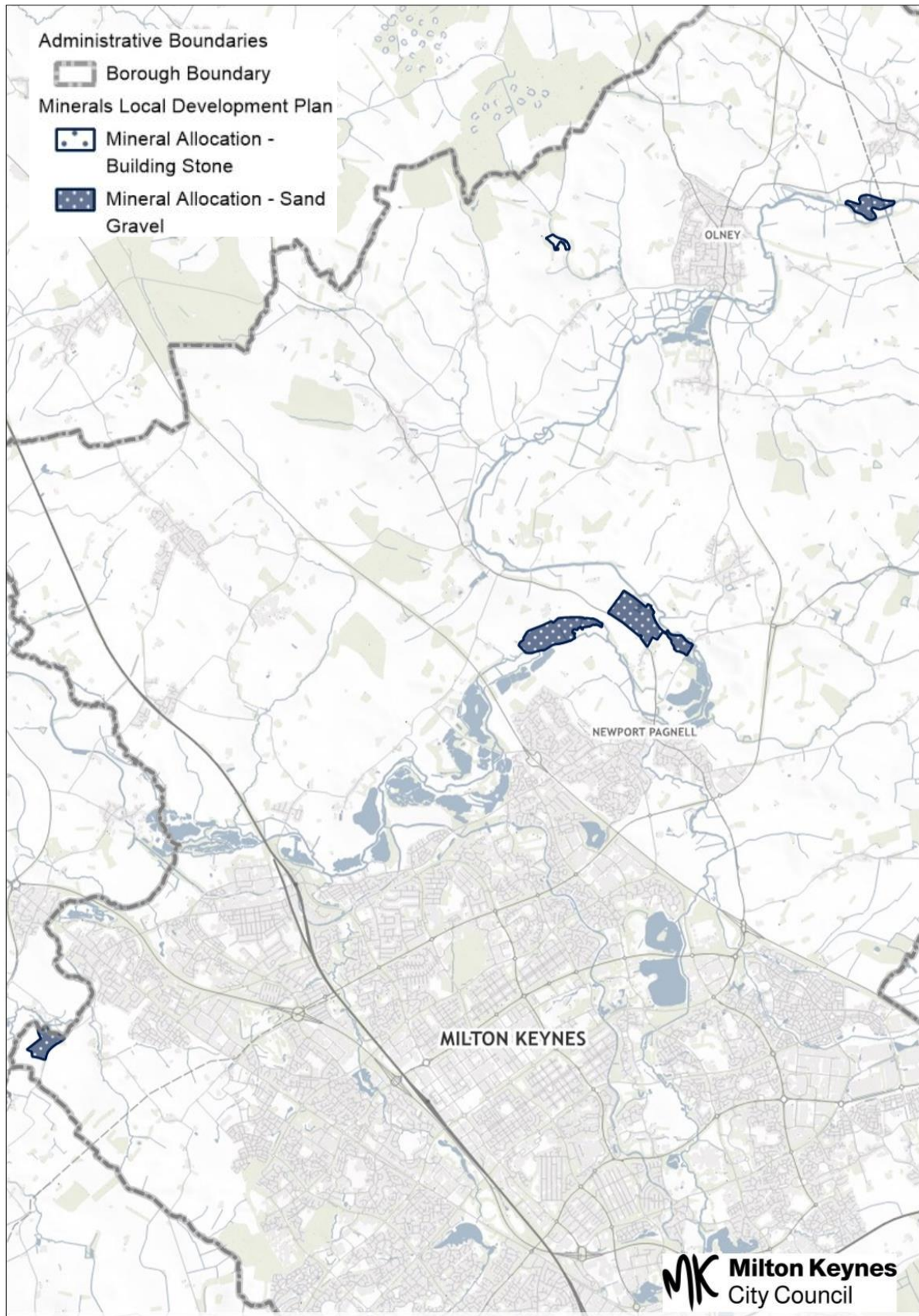


Figure 2: Mineral Allocations in Milton Keynes.

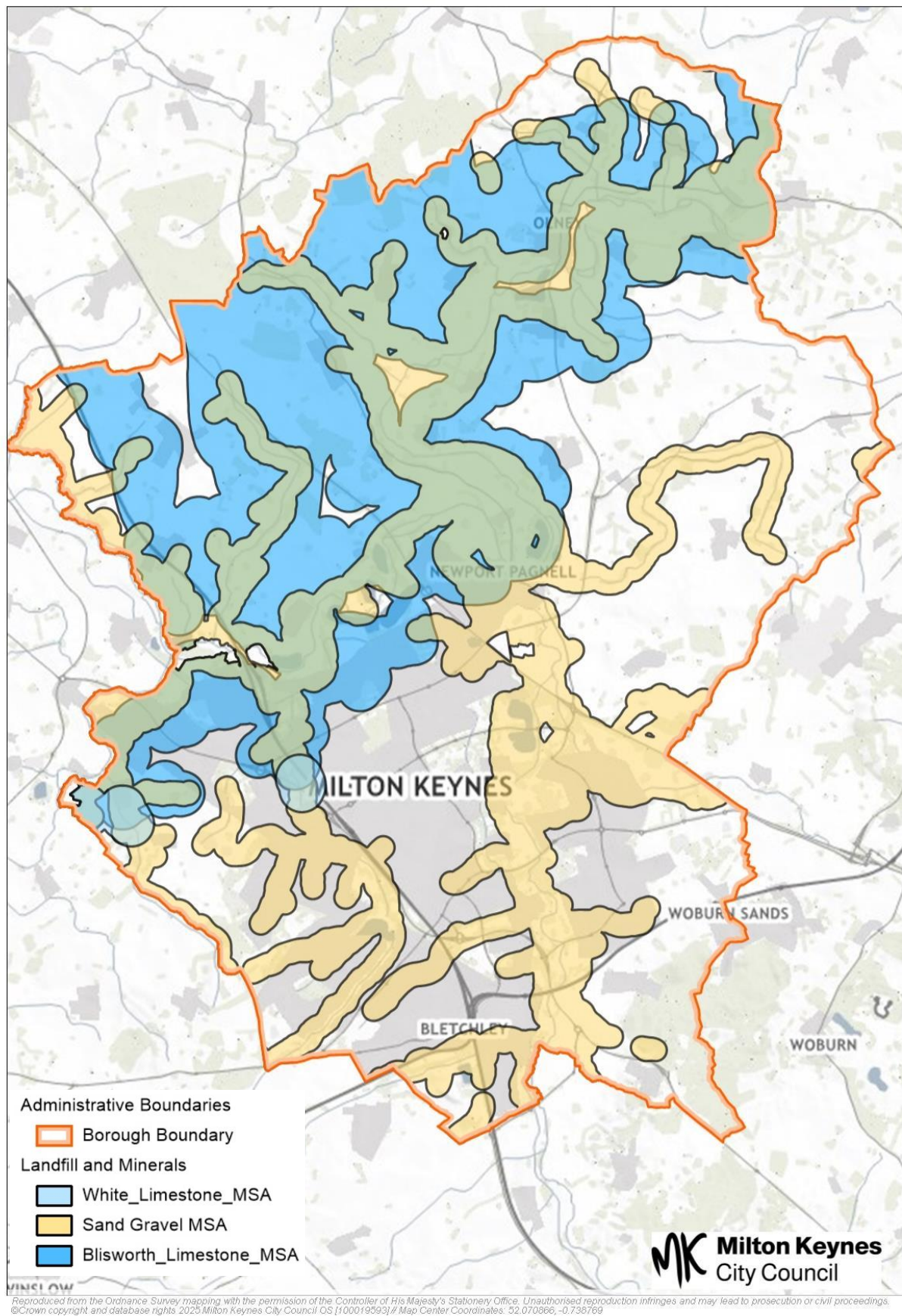


Figure 3: Minerals safeguarded areas

Aggregate supply and demand

The bedrock geology of Milton Keynes is mostly Jurassic mudstone and limestone with Cretaceous sand and sandstone outcrops in the south-east of the borough (Figure 1). Areas of superficial deposits are extensive in the borough and obscure this underlying geology (Figure 2, Table 1).

Sand and gravel are the main aggregate mineral resources in Milton Keynes found in river terrace deposits of the Great Ouse River and its tributaries. Most deposits are concentrated in the valley of the River Ouse to the north of the M1 motorway. Small patches of sand and gravel are also found in glaciofluvial deposits. However, it is likely to be too clayey and chalky to be of economic interest. The majority of glaciofluvial deposits have been fully worked or sterilised by urban development. Sand and gravel are also found in deposits referred to as Sand and Gravel of Unknown Age and Origin but has now been either worked or sterilised by urban development. At the end of 2024, sand and gravel extraction took place at only one quarry in Milton Keynes.

Milton Keynes does not have any significant crushed rock resources. Over at least the last fifteen years there has been no extraction of crushed rock. Currently there is a small operational quarry at Weston Underwood that extracts limestone for non-aggregate building stone purposes. Apart from this one quarry, there has been no other working of building stone in Milton Keynes for many years. Further resources are known to be in the locality although the total yield is likely to be small. Sites of former small scale limestone quarries include Great Linford and Calverton.

Geology

Deposit		Description
River deposits	Alluvium	Comprised of clay and silt, alluvium underlies the present day floodplains, generally occupying a wide but shallow channel cut into the underlying river terrace deposits. Concealed river terrace sand and gravel deposits underlay the alluvium and are referred to as 'sub-alluvial gravels'.
	River terrace	River terrace deposits, largely comprised of sand and gravel, are predominantly found in the river valleys associated with the Great Ouse river and its tributaries.
Sand and Gravel of Uncertain Age and Origin		Clayey, sandy gravel designated Sand and Gravel of Uncertain Age and Origin, occurs only in the valley of the River Ouzel.
Glacial deposits	Till	Glacial till (boulder clay), is found on the higher, plateau-like, ground in the borough.
	Glaciofluvial	Glaciofluvial deposits are comprised of clayey sand and gravel, found beneath, within and upon the till.
	Glaciolacustrine	Glaciolacustrine deposits comprise silt, clay with sparse sandy layers and are associated with the till.

Mass
movement
deposits

Head

Head occurs on the lower valley sides and valley bottoms where it merges with the river terrace deposits. It is typically gravelly, sandy clay.

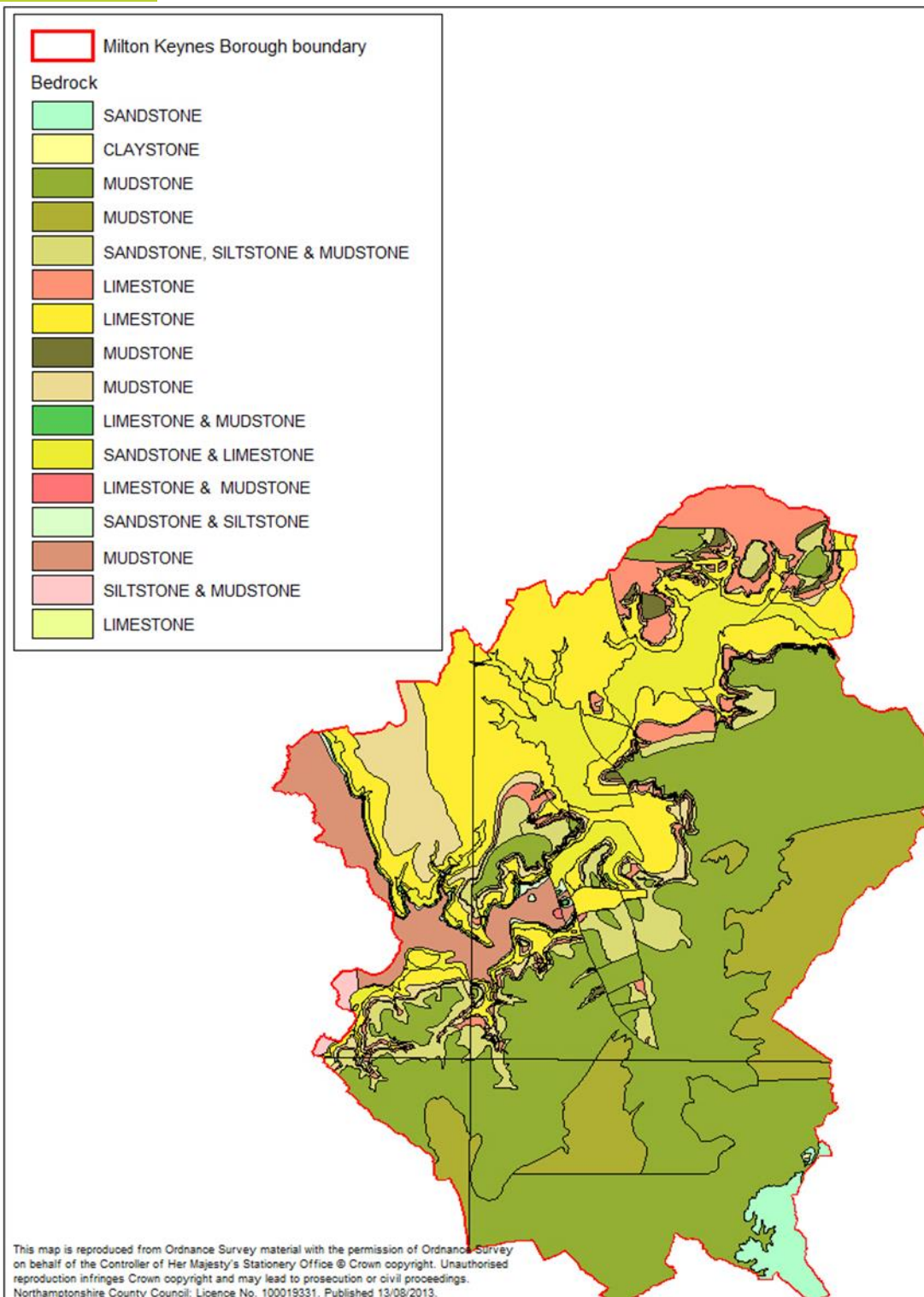


Figure 4: Geological bedrock map of Milton Keynes.

Sand and gravel

In Milton Keynes, there was one sand and gravel site with planning permission which was active in 2024: Michael's Quarry at Land to north and east of Lathbury. The details of this site are presented in Table 2, and its location and associated geology are shown in Figure 6.

Table 2: Permitted sand and gravel sites in Milton Keynes (as of 31/12/2024)

Site	Operator	Status	Permission end date
Michael's Quarry. Land to north and east of Lathbury. (MLP allocation A3)	Smith Aggregates Ltd	Active quarry. Permission granted in 2018 for extraction of 0.61 Mt of sand and gravel.	2030

Estimated total sand and gravel permitted reserves for Milton Keynes as of 31 December 2024 cannot be published for confidentiality reasons but are known to be relatively limited.

Milton Keynes sales

Sales of sand and gravel have fluctuated over the last ten years. Sales increased significantly in 2015, fell in 2016 and increased again in 2017. Between 2017 and 2019 sales fell by 86%, and despite the Covid 19 pandemic, sales between 2019 and 2020 increased again (by 65%). Due to the increase in production at one site in particular, sales in 2021 increased by 300% and reached the highest level seen since 2010. It is likely that the periods of time when sales declined are directly attributable to a deficit between rates of extraction and rates of replenishment through new permissions. The growth in sales in 2015 can be attributed to increased production levels at the Land at Calverton site and commencement of extraction at the Land east of Haversham Road quarry, which was granted permission in 2014. There were no sales from the Land at Calverton site in 2016, resulting in an overall decline in sales for this year. The growth in sales in 2017 can be attributed to sales resuming at Calverton and to higher production levels at the other two active sites.

Sales fell in 2018 as the active quarry Land at Calverton came to its end of life and production levels reduced at Land south of Caldecote Farm. Two new permissions were granted in 2018; Land at Passenham (eastern extension) and Land to north and east of Lathbury however their permissions remained unimplemented thus leading to the overall reduction in sales. Sales fell significantly in 2019 as the two new permissions remained unimplemented, production remained low at Land south of Caldecote Farm as it came to its end of life, and Land east of Haversham Road quarry was exhausted.

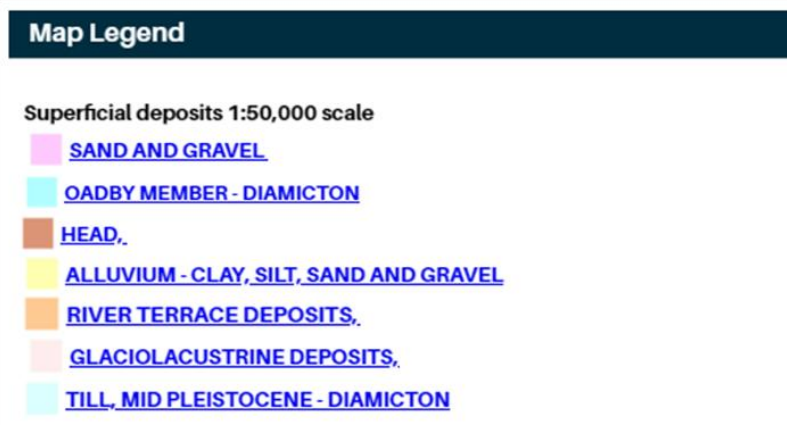
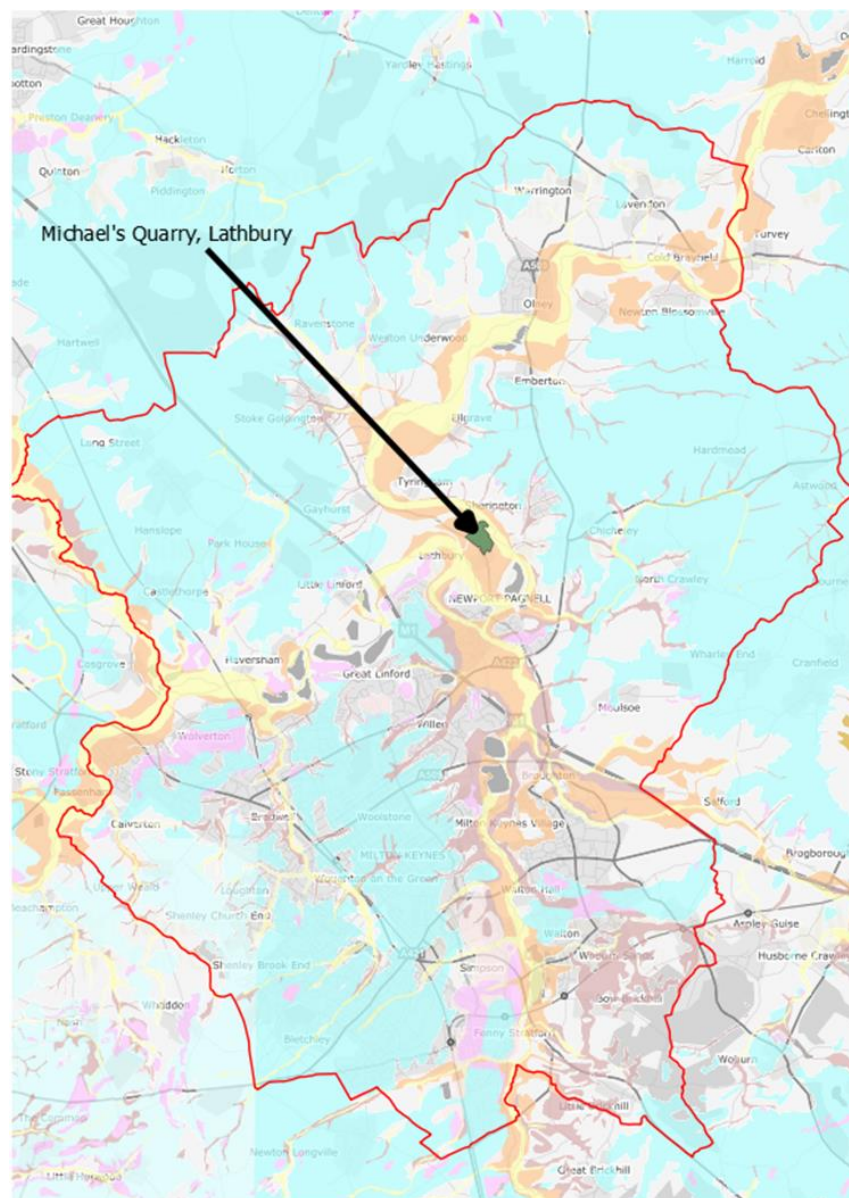


Figure 6: Location of permitted sand and gravel sites in Milton Keynes. Data from BGS.

In 2020, the quarries at Land at Passenham (eastern extension) and Land to north and east of Lathbury commenced extraction, leading to an overall growth in sales, although the site at Land south of Caldecote Farm quarry was exhausted and no longer contributed to sales. However, overall sand and gravel sales decreased in 2022, relative to 2021 (by 16%), as the Passenham eastern extension site came to its end of life in June 2022, leaving

Michael's Quarry to the north and east of Lathbury as the only working sand and gravel quarry. This site is still operational, and a planning application is currently submitted to the Council for approval of extensions to the quarry which would provide 0.285Mt of additional supply.

Imports and exports

A national Aggregate Minerals (AM) survey is conducted by the Department for Levelling up Housing and Communities (DLUHC) and British Geological Society (BGS) generally every four years. The survey includes analysis of movements (imports and exports) of aggregates for each MPA in England and Wales. In the past, import data for Milton Keynes has been combined with Buckinghamshire as one sub-region and sales data has been presented separately. In the 2023 national AM survey, import data has been collected for Milton Keynes as a standalone Minerals Planning Authority (MPA) area.

Results of this latest survey indicate that Milton Keynes is a net importer of sand and gravel. While precise sales figures are confidential, it is possible to say that all sand and gravel extracted in Milton Keynes, from Michael's Quarry, was sold within Milton Keynes. Sand and gravel was also imported by rail to the Bletchley rail depot for sale within Milton Keynes.

Data from previous AM surveys shows that, specific to Milton Keynes, in 2019 the destination of sales was unknown. However, in the 2014 survey the majority (97%) of sand and gravel produced stayed within the sub-region (Table 3). There were no exports to the South East region (beyond the Buckingham-Milton Keynes sub-region) presumably because Milton Keynes is on the edge of the region, with a large proportion of the borough surrounded by counties in the East of England and East Midlands regions.

Table 3: Destination of sand and gravel produced in Milton Keynes in 2014

Destination region	Destination sub-region	Percentage
South East	Buckingham and Milton Keynes	97%
East Midlands	Northamptonshire	2%
East of England	Bedfordshire (Central Bedfordshire, Bedford, Luton) Suffolk	1%

Source AM survey 2014. The AM surveys in 2019 and 2023 do not provide destination of sales from Milton Keynes.

Sand and gravel produced within the Buckinghamshire and Milton Keynes sub-region in 2014 totalled 0.76 Mt, of which just under half (0.35 Mt) remained within the sub-region. Exports from the sub-region totalled 0.41 Mt with 0.34 Mt staying within the south east region and the remainder exported to other areas outside of the region. Results from the 2009 AM survey showed that the Milton Keynes and Buckinghamshire sub-region was a net exporter of sand and gravel with 0.40 Mt (44%) of the total produced being exported whilst 0.24 Mt was imported, leaving a balance of minus 0.16 Mt. The move out of the economic recession since 2010 may explain the growth in imports in the later survey as sand and gravel production increased nationally.

As nationally, in the South East most sand and gravel and crushed rock aggregate is transported by road, with significantly less transported by rail and water. Some of the sand

and gravel and crushed rock imported into Milton Keynes is by rail and uses the rail depot at Bletchley. For sand and gravel, over the past 10 years sales from the Bletchley rail depot have been increasing. However, likely reflective of the recent high inflation, high interest rates, and subsequent slowdown in housebuilding, there has been a downward trend in sales over the past 3 years.

We will conduct another local aggregate monitoring survey for the 2025 calendar year, starting in early 2026.

Limestone

Current supply

At present, there are no permitted sites for the extraction of limestone for aggregate (i.e. crushed rock) purposes in Milton Keynes. One site at Weston Underwood Quarry currently extracts limestone for non-aggregate building stone purposes, however, it is a small site with limited output.

Milton Keynes sales

There have been no sales of crushed rock locally won within Milton Keynes in the ten-year period between 2015 and 2024. With regards to the production of limestone for non-aggregate building stone purposes, there were no sales between 2007 and 2009 but in more recent years between 2014 and 2023 there were a small number of sales (although figures cannot be identified for confidentiality reasons).

Imports and exports

The 2019 AM survey shows that in 2019 imports of crushed rock into the Milton Keynes – Buckinghamshire sub-region totalled 0.704 Mt. Milton Keynes does not produce any crushed rock and is a net importer. The previous 2014 AM survey showed that imports into the sub-region were 30% lower (0.49 Mt). 2024 data shows that the trend of Milton Keynes being a net importer has continued; over the past 10 years crushed rock sales from the Bletchley rail depot has continued upwards. However, imports of crushed rock over the past 3 years have decreased slightly.

Secondary and recycled aggregate

Recycled aggregates, which include concrete, stone and brick are sourced from reprocessed materials that have previously been used in construction, demolition, and excavation (CD&E) work. Secondary aggregates are usually by-products of other industrial processes that have not been used in construction. They include both natural and manufactured materials such as china clay, slate, flue ash and slag.

There is an increased importance of, and reliance on, alternative aggregate sources. Production of recycled and secondary aggregates is increasing in England and Wales especially following the introduction of the Landfill Tax, which discourages the disposal of waste to landfill, and the Aggregates Levy which taxes the extraction of primary aggregates.

It is estimated that around 30% of total aggregate production and consumption in England is comprised of secondary and recycled aggregates. As the alternative aggregate sector grows, and provided the aggregate produced is of good quality, the reliance on primary aggregates will reduce.

There is one facility producing recycled aggregates in Milton Keynes, an aggregates recycling centre at Lathbury with a stated capacity of up to 0.05 Mtpa (based on a waste operator's survey response). There is also a waste transfer and recycling facility located at Chesney Wold, Bleak Hall that segregates hardcore aggregate waste. Milton Keynes does not produce any secondary aggregate. A proposed recycled aggregates facility near the Cotton Valley water treatment centre was permitted in 2016 however the permission has lapsed.

The data available on secondary and recycled aggregate is variable and not considered completely reliable, particularly at the sub-regional level. National surveys undertaken for CD&E waste provide comparable datasets from 1998, 2003 and 2005. The 2005 dataset shows total arisings of CD&E waste for the Southeast of 14.2Mt, of which 4.2Mt is attributed to Berkshire, Buckinghamshire (including Milton Keynes) and Oxfordshire. More recently the Waste and Resources Action Programme (WRAP) undertook a study to estimate CD&E waste at a national level indicating arisings of 94.5, 76.9 and 77.4Mt for 2008, 2009 and 2010, respectively. The study estimated that 55% was recycled and 11% re-used or recovered on exempt sites (e.g. as clean fill for engineering purposes usually land reclamation, agricultural improvement, or infrastructure projects).

At the time of writing the draft LAA, no sales data for the Smith RA facility has been obtained for 2024. Based on data from the Waste Data Interrogator (WDI) 2024, using the RA methodology agreed by the National Waste technical Advisory Body Chairs, it is estimated that approximately 126,000 tonnes of materials suitable for RA production could have been generated in Milton Keynes in 2024. However, there are no other known RA sites in Milton Keynes other than the Smith RA facility mentioned above, so it is considered that estimated RA sales should be revised down to 50,000 tonnes for 2024, corresponding with the capacity of this site. The WDI 2024 indicates that a relatively small amount (1,825 tonnes) of material suitable for RA production was exported from Milton Keynes for treatment elsewhere in the country. However, no data exists on whether this was returned to Milton Keynes for sale as RA.

Future aggregate supply

Aggregate provision

An annual aggregates provision rate (APR) figure for Milton Keynes is required to ensure an adequate and steady supply of aggregates is maintained to meet anticipated needs of the construction industry and reflect housing provision and growth.

Sand and gravel

The NPPF requires each MPA to calculate their own APR based on average aggregate sales over a ten-year rolling period and other relevant local information. Table 4 presents the total sand and gravel sales in Milton Keynes during the ten-year period 2015 - 2024 (however most of this data is confidential), shows the 10-year average sales for the period 2015 - 2024 and 3-year average sales for the period 2022 - 2024. The most recent ten-year period of sales would give a sand and gravel provision rate figure of 0.163 Mtpa.

Table 4: Total sand and gravel sales in Milton Keynes 2015 – 2024

Year	Sand and gravel (Mt)
2015	C
2016	C
2017	0.24
2018	C
2019	C
2020	C
2021	C
2022	C
2023	C
2024	C
Total sales 2015 – 2024	1.631
10-year average 2015 – 2024	0.163
3-year average 2022 – 2024	0.174

'C' confidential

Government Planning Practice Guidance for Minerals (DCLG, 2014 - paragraph 64) states that MPAs should also look at the average 3-year sales to identify the general trend of demand and whether it may be appropriate to increase supply. The figure based on average 3-year sales for the period 2021 - 2023, as reported in the previous LAA, was 0.214 Mtpa; which is 22.9% higher than 0.174 Mtpa, the figure for the most recent 3-year period (2022 - 2024). The APR for sand and gravel in the adopted MLP¹ is 0.17 Mtpa

¹ The MLP was adopted on 1 July 2017.

(based on the 3-year average sales 2010 – 2012). This is 4.3% higher than the 0.163 Mtpa figure for the most recent 10-year average sales and 2.3% lower than the 0.174 Mtpa figure based on the most recent 3-year average sales.

Table 5 compares the provision of sand and gravel based on different provision rates (including the MLP provision rate) for the remaining 9 years (1 January 2025 – 31 December 2032) of the 20-year plan period (1 January 2013 – 31 December 2032).

Table 5: Provision of sand and gravel in Milton Keynes to 2032 based on alternative provision rates.

	Adopted MLP provision rate	10-year average sales figure (2015 – 2024)	3-year average sales figure (2022 – 2024)
Annual provision rate (Mtpa)	0.17	0.163	0.174
Total plan requirement (Mt): Annual provision x 8-year remaining plan period (2025 to 2032)	1.36	1.304	1.372
Permitted reserves (as at 31/12/24) (Mt)	C	C	C
Undersupply (-) over supply (+) (rounded to the nearest Mt)	-1	-1	-1

'C' = confidential

Comparison of total plan requirements under each provision rate with permitted reserves as of 31 December 2023, indicates that there are insufficient reserves to meet the 8-year remaining plan requirement. To address local supply, the MLP identifies four sand and gravel allocations. One of these allocated sites: A1 Calverton/Passenham Extension (known as Land at Passenham eastern extension) was permitted in 2018 and exhausted (and was restored) in 2022. Allocated site A3 at Northampton Road, Lathbury (known as Land to north and east of Lathbury) was permitted in 2018. While Site A3 is being progressively worked, there are additional allocated mineral resources within the authority area that could come forward for extraction in due course. At the time of writing (November 2025) the operator of site A3 has submitted an application to extend the site, which if granted planning permission would provide a saleable mineral reserve of up to 285,000 tonnes of sand and gravel. This has been approved by Planning Committee but is subject to legal agreement.

Table 6: Remaining allocated sites for sand and gravel extraction in the adopted MLP

Allocations	Approximate reserve (Mt)
A2 Quarry Hall Farm	0.72
A3 Northampton Road, Lathbury	Up to 0.62*
A4 Manor Farm and Lavendon Mill	0.46
Total reserves	1.8

* Precise remaining reserve confidential.

In addition to allocated sites, it is possible that unallocated, or ‘windfall’ sites in Milton Keynes may come forward during the plan period and add to the supply. The current application to extend Site A3 includes an extraction area outside the original allocation.

Limestone

It is not possible (nor is it considered appropriate) to identify a provision rate for crushed rock as there have been no sales of crushed rock for at least the last fifteen years.

Secondary and recycled aggregate

It is also not possible to determine a provision rate for secondary and recycled aggregates based on average sales over a ten-year period. Sales information is difficult to obtain due a low response rate to AM surveys in Milton Keynes and unfortunately where data has been provided in the past, it is not consistent.

Landbanks

A landbank is a stock of planning permissions for mineral extraction which are calculated by dividing permitted reserves by the provision figure. National planning policy requires landbanks of at least 7 years for sand and gravel to be maintained. Approximate landbanks for sand and gravel for Milton Keynes as of 31 December 2024 are shown in Table 7.

Table 7: Landbanks for sand and gravel in Milton Keynes in 2024

	MLP provision rate	10-year average sales figure (2015 – 2024)	3-year average sales figure (2022 – 2024)
Annual provision rate (Mtpa)	0.17	0.163	0.174
Permitted reserves (as at 31/12/23) (Mt)	C	C	C
Landbanks (rounded to full years)	1	1	1

'C' confidential

The Milton Keynes area has a history of not meeting landbank figures due to a limited number of extraction sites coming forward which often creates a deficit between rates of extraction and rates of replenishment through new permissions. Under the MLP provision rate, as well as the 10- and 3-year averages there are not enough reserves remaining to meet the minimum 7-year landbank requirement. Should the remaining two sand and gravel allocations in the MLP, and the proposed extension to Site A3, be brought forward and permitted they have the potential to increase the landbank further.

No landbanks have previously been required to be maintained for crushed rock as no apportionment/provision figure was adopted and this continues to be the case.

Consideration of local circumstance

The NPPF requires MPAs to base their future mineral requirements on average sales over a 10-year rolling period, factoring in relevant local information to provision determination where applicable.

Local factors affecting the supply and demand of sand and gravel in Milton Keynes are discussed below. No apportionment has previously been identified for crushed rock in Milton Keynes due to low output; therefore, consideration of local information affecting its supply and demand is not included.

Demand for sand and gravel

Construction levels and population growth

Sand and gravel are used in the construction industry for purposes such as the making of concrete and mortar or for roadstone or drainage material. The level of construction, including house building and infrastructure, therefore contributes to the demand for sand and gravel and are key local factors to consider when determining a provision figure for Milton Keynes.

Milton Keynes has historically been, and continues to be, one of the fastest growing areas in the country. Since it was designated a New Town in 1967, the population has grown from 60,000 to around 287,100 (ONS 2021). The Regulation 19 version of our emerging Local Plan (the Milton Keynes City Plan 2050, or MKCP) provides for a minimum of 50,372 net new homes over the period 2022 to 2050, to ensure our objectively assessed housing need is met. This equates to an annual housing target of 1,799 homes. To support meeting the minimum housing requirement, a buffer of 19% is proposed which would equal a total of 59,779 homes. This equates to an annual target of 2,135 homes. The annual housing target based on minimum housing need is not significantly more than the present target set out in Plan:MK of 1,767 homes. However, the housing buffer target is a moderate uplift on this. This factor indicates the APR may need to be increased to reflect the likely increase in demand for sand and gravel to support a higher rate of housing growth. However, it is noted that the final housing target in the MKCP is subject to change as the Local Plan Inspector may decide to add/remove sites from the Plan during Examination.

The rate of house building in Milton Keynes has fluctuated over the last 20 years. Figure 4 shows the number of housing completions over the last ten years between 2013/14 and 2023/24. Net housing completions were at their lowest in 2013/14 (1,000 net completions) and in 2022/23 reached their highest levels in the last ten years (2,895 net completions) before falling back slightly to 2,200 net completions in 2023/24. Net completions in the most recent monitoring period (2024/25) increased slightly to 2,351.

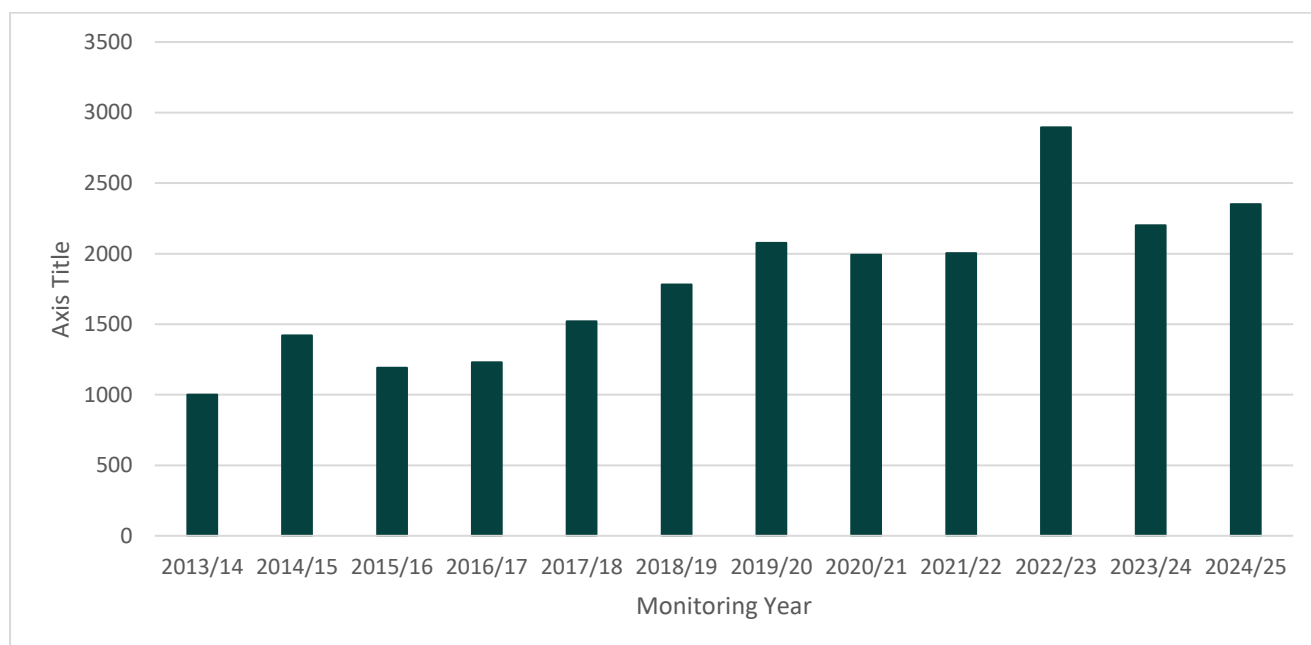


Figure 7: Housing completions in Milton Keynes 2013/14 – 2024/25

The Milton Keynes Local Plan (Plan: MK), adopted in March 2019, sets out a requirement for approximately 26,500 dwellings to be built within the plan period 2016 - 2031, equating to around 1,766 dwellings per annum. In 2024/25, total net completions were 2351; 585 dwellings above target. See the council's Authority Monitoring Report for further information on housing delivery in the City².

However, a degree of caution should be exercised when considering the correlation between demand for aggregate and level of house building. Between 2008 and 2010 for example sales of sand and gravel increased by 14% but during this same period the total number of housebuilding completions in the borough decreased by 30% and between 2017 and 2019 sales of sand and gravel decreased by 86% but during this same period the total number of housing completions increased by 43%. Conversely, sales of sand and gravel

² [Authority monitoring report | Milton Keynes City Council \(milton-keynes.gov.uk\)](https://www.milton-keynes.gov.uk/authority-monitoring-report)

began to fall between 2011 and 2014 when rates of housing building were also relatively low.

One national infrastructure project is planned for Milton Keynes: the development of an East West Rail link between Cambridge, Milton Keynes, and Oxford. Phase 1 of the scheme from Bicester to Oxford is complete and Phase 2, linking Oxford to Bletchley, is complete and accommodating rail freight movements. Passenger movements are expected to start by the end of 2025 subject to contractual agreements. The precise timeline of fully opening the next Phase, Bletchley to Bedford, is yet to be confirmed. However, the Spring 2025 Budget announced a target of one train per hour between Oxford and Bedford by 2030.

A Special Development Order (SDO) application was made earlier this year to Government for the development of an entertainment resort complex operated by Universal Studios on land near Bedford. If granted, the 268-hectare development is likely to generate significant demand for building materials, including aggregates, at a national level. A decision whether to approve the SDO is due by the end of 2025.

The Milton Keynes Local Investment Plan (2022) identifies minimum infrastructure requirements, including transport developments, to enable sustainable growth in Milton Keynes for the Plan:MK plan period 2016-2031. This plan, together with the adopted Plan:MK, outlines several indicative transport, energy, health, education, and other projects for Milton Keynes.

Construction continues for the High Speed Two (HS2) rail network which would connect London and the West Midlands. However, no part of the new railway line will pass through Milton Keynes with the nearest point being 15 miles to the west. It will place demands on aggregates nationally, but it is difficult to identify at this stage the detail of the amount of mineral required.

Whilst in and around Milton Keynes there has always been a growth focus, the above projects and proposed housing delivery targets, employment development set out in the MKCP indicate there may be a need to increase the APR in future years. While the level of housing growth set out in the MKCP is comparable to (and sometimes less than) the number of homes delivered in the city since 2019, the range of significant projects in the region, notably Universal Studios, may increase local demand for aggregates to an extent that justifies raising the APR. However, it is considered appropriate to wait until there is more certainty around the Universal Studio proposals and MKCP housing targets before making a decision. This will be considered in the next LAA and during preparation of our new Minerals and Waste Local Plan, work on which is expected to start next year.

Supply of sand and gravel

Mineral commitments/allocations

The supply contribution from permitted sand and gravel sites in Milton Keynes is limited.

Two remaining sand and gravel sites are allocated in the MLP. If all sites are developed (subject to planning permission in accordance with relevant local plan policies) they will potentially add up to 1.18 Mt to the existing supply. In 2018, allocations A3 Northampton Road, Lathbury received planning permission for the extraction of 0.62 Mt of sand and gravel; this site has been progressively worked since then and reserves have decreased, although the precise remaining reserve is confidential.

Commitments for producing secondary and recycled aggregates

Most of the development in Milton Keynes is on greenfield sites and few buildings and structures are demolished therefore a limited amount of recycled material is generated to be used as aggregate. There is an operational recycled aggregates facility in Lathbury that has a capacity of 0.05Mtpa, although precise sales figures are unknown. It is therefore considered that there will remain a continued reliance on primary aggregate sources to meet demand.

Rail depot commitments

Currently there is one aggregate rail depot in Milton Keynes at Station Yard, Bletchley, operated by Cemex. For several years, it has been working close to its maximum annual output capacity. Policy 13 (Sustainable Transport) in the MLP recognises that aggregate rail depots are valuable transport infrastructure to help facilitate more sustainable transportation of minerals and encourages this development. Therefore, should greater capacity be required in the future to meet demand, either through an extension to an existing, or new aggregate rail depot, it is supported in principle.

In line with Paragraph 223 e) of the NPPF (2024) and Policy 19 of the Milton Keynes Minerals Local Plan (2017), this site is safeguarded due to its importance for the supply of aggregates in the local area. As recognised in Policy SD16 in Plan:MK (2016), Central Bletchley is a focus for inward investment and regeneration, including near the Bletchley railway station. We will ensure that operation of the existing rail depot (and any new depots) is safeguarded, considering these associated development pressures. We are also actively engaging with East West Rail to ensure that ongoing improvements to Bletchley station do not negatively impact operations at the rail depot.

Reflecting the constrained supply of aggregates from extraction sites within Milton Keynes at present and the importance of aggregate imports to local bulk mineral transport infrastructure, we will be considering whether there are additional measures we can employ to safeguard operations at such sites. For example, during preparation of the next MLP we could engage and agree Statements of Common Ground through the Duty to Cooperate with relevant stakeholders and Mineral Planning Authorities, to jointly recognise the importance of these sites for the supply of aggregates to the market in Milton Keynes.

Investment opportunities

The nature of the mineral resources in Milton Keynes is such that large scale sites are not likely to come forward in the long term. This means that in the future, sites are likely to be more of the scale of those allocated in the MLP. Such sites tend to be more suited to medium sized operators rather than larger international companies who also operate in the UK. At the time of producing the MLP, it was known that medium sized operators were actively looking for opportunities in the Milton Keynes area. Currently, however, wider operator interest in the authority area appears to be limited, particularly for standalone sites. One site is currently active: Michael's Quarry. Nevertheless, historical data shows the authority area could deliver at least two to three sites at any one time into the future, which would support delivery of the APR of 0.17 Mtpa.

Resources and constraints

The MLP identifies two further allocations (at Sites A2 and A4) that are considered to meet requirements to 2032 (the end of the MLP period), and which are capable of being delivered. Notwithstanding the current application to extend Michael's Quarry, the Council is exploring options to further bolster supply considering the current landbank. The existing allocations will far from exhaust the opportunities for further extraction post-2032. There will be further opportunities in the Ouse Valley in areas where environmental and amenity considerations are such that extraction would not be ruled out on these grounds. There is also the possibility that the Tove Valley could be an alternative long-term location subject to the resource being of a scale and quality but balancing the potential higher costs to access these sites, to make extraction worthwhile.

Supply and demand balance

Milton Keynes is a longstanding growth area with significant demand for aggregates for house building. However, with a limited supply contribution from permitted sand and gravel sites; resulting in a landbank of just 1 year, the MPA considers it is not currently making the contribution it could make to aggregate supply through the industry taking up the sites allocated in the MLP. The MPA has set an appropriate provision figure, not too low to constrain supply or encourage undue reliance on imports from other areas, and there are no environmental constraints to supply in terms of their being any national or international designations in the authority area, save for three small Sites of Special Scientific Interest.

Summary

An adequate and steady supply of aggregate is required to meet anticipated needs of the construction industry and support continued economic growth in Milton Keynes. Government guidance (NPPF) requires MPAs to calculate annual aggregate provision based on rolling 10-year average sales data and other relevant local information. Local information to consider includes:

- Housing and infrastructure construction levels,
- Population growth,

- Current commitments,
- Investment opportunities, and
- Available resources and constraints.

The average aggregate sales for sand and gravel for the most recent 10-year rolling period (2015 – 2024) is 0.163 Mtpa, which is 0.07 Mt lower than the MLP APR. The supply contribution of sand and gravel in Milton Keynes is currently limited and based on the MLP provision rate there are insufficient permitted reserves (as of 31/12/2024) to maintain a 7-year landbank. However, should the remaining two sand and gravel allocations in the MLP be brought forward (together with any non-allocated sites) and approval of the current application to extend Michael's Quarry (near Lathbury), there is the potential to increase the landbank further.

During the period covered by this LAA the Covid-19 virus pandemic was still affecting the global economy. According to the Mineral Products Association Sustainable Development Report Data and Developments 2020/21, construction activity increased in 2021 and was on track for 14% growth, although this figure is compared to 2020 which was more severely hit by site closures. Mineral aggregate sales also increased in 2021 and 2022, although sales have decreased this year. However, housing completions are up this year relative to last year. This could be due to a decrease in employment floorspace completions which offset higher homes completions, but we have limited data available on local employment completions for 2024/25 so we will provide further analysis on this trend in the next LAA. Government has also announced a housing target of 1.5 million new homes by the end of this Parliamentary period, so we are likely to see additional stimulus added to the market over the coming year to increase construction rates.

Considering the sales trends and other factors listed above, the Aggregate Provision Rate for sand and gravel to be used for determining planning applications and calculating the landbank will continue to be 0.17 Mtpa. However, we will revisit this in the next LAA when the precise housing targets set by the MKCP will be more certain. We are also likely to have started preparation of a new Minerals and Waste Local Plan (MWLP) by that point, which will lead to greater understanding of options for future supply of minerals sites locally.

Previously, an annual apportionment for crushed rock (limestone) for Milton Keynes has not been required to be identified and it is still not considered appropriate. Limestone for use as building stone is however supported in plan policy. Likewise, no annual provision target is set for secondary and recycled aggregates. However, policies in the MLP support their continued production as alternatives to primary aggregates.

