

The area involved – 27th annual report



MARINE AGGREGATE EXTRACTION 2024



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Marine aggregate extraction 2024

Contents

02	Introduction and summary information
03-04	Summary statistics for 2024
05-06	Humber region
07-08	East Coast region
09-10	Thames Estuary region
11-12	East English Channel region
13-14	South Coast region
15-16	South West region
17-18	North West region
19	The Crown Estate and BMAPA

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An industry committed to responsible management through continual development

In March 1999, The Crown Estate and the British Marine Aggregate Producers Association (BMAPA) issued a statement of intent committing to reviewing all marine aggregate extraction over a rolling five-year period. Included was a commitment to surrender areas no longer containing useful resources of sand and gravel and to publish an annual report detailing the extent of dredging within the licensed areas.

This year's report, for the period 1st January 2024 to 31st December 2024, is the 27th in an ongoing series. Its content reflects the continued commitment to this initiative by both The Crown Estate and the members of BMAPA.

This report contains summary information relating to The Crown Estate area of seabed licensed, dredged and surrendered during 2024 based on GIS data and from analysis of dredger Electronic Monitoring System records. Information on dredged area and intensity (reported as time dredged per 50 m x 50 m grid cell) has been calculated using variable grid analysis.

A set of regional charts has been prepared to show the extent and intensity of dredging operations. Additional facts and figures on marine aggregate extraction activity by region are also presented.

The figures for the active dredge area - the total area actually available to be dredged during the year through zoning restrictions - have been updated for 2024. While the limits of these working areas are not presented on the charts associated with this report, detailed regional charts showing the current working areas (updated on a bi-annual basis) are available from The Crown Estate and BMAPA websites, or by contacting the addresses on the last page of this report.

2024 summary

The figures below relate to marine aggregate extraction on Crown Estate Production Agreement areas in England and Wales

The **total amount** of sand and gravel dredged

19 m tonnes

(19 m tonnes in 2023)

The **area of seabed licensed** increased to

1185 km²

(1103 km² in 2023)

The **area of seabed dredged** increased to

130 km²

(113 km² in 2023)

The **area of seabed dredged for more than 1 hr 15 mins** per year decreased to

5 km²

(6 km² in 2023)

The **percentage of licensed area dredged** increased to

11 %

(10 % in 2023)

90% of dredging effort on Crown Estate licences took place from

53 km²

(42 km² in 2023)

Region	Total area licensed during 2024 (km²)	Total active dredge area for 2024 (km²) *1	Total area dredged during 2024 (km²)
Humber	307.7	184.3	34.6
East Coast	168.7	155.1	30.4
Thames	141.7	107.1	13.3
East English Channel	215.6	100.5	26.0
South Coast	134.2	58.7	15.8
South West	130.2	31.1	7.6
North West	86.6	18.6	2.5
Total (km²)	1184.7	655.4	130.2

Area of seabed licensed increased by 82 km² during 2024

Area of seabed licensed (km²) 2020-2024

Year *2	2020	2021	2022	2023	2024
0 – 6 nm*3	341	354	354	352	337
6 – 12nm*3	325	325	325	325	368
>12 nm*3	389	389	426	426	480
Total area licensed (km²)	1055	1068	1105	1103	1185
Total active dredge area (km²)	578	550	581	629	655

Area of seabed dredged increased by 17 km² during 2024

Area of seabed dredged (km²) 2020-2024

Year	2020	2021	2022	2023	2024
0 – 6 nm*3	41	40	42	50	49
6 – 12nm*3	30	31	29	31	38
>12nm*3	30	35	36	32	43
Total (km²)	101	106	107	113	130
Area dredged >1 hr 15 mins (km²)	5.1	6.4	6.9	5.8	4.8
90% of dredging effort (km²)	41.9	43.0	43.6	42.1	53

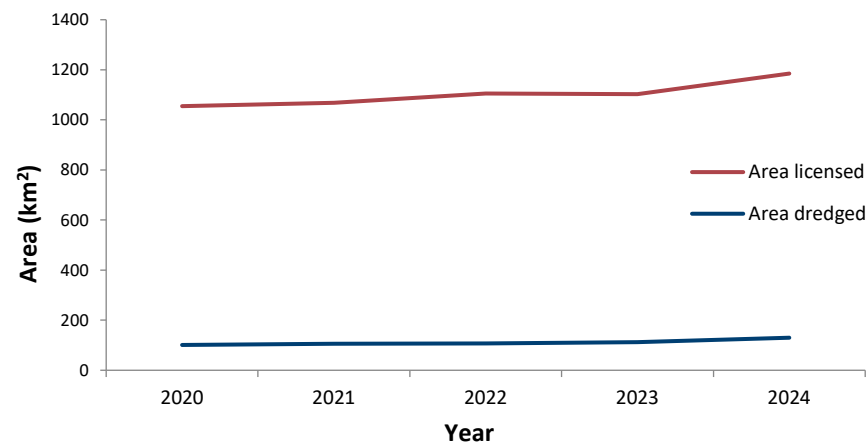
*1 Total area actually available to be dredged due to zoning during 2024, calculated on a cumulative basis

*2 Annual figures are calculated as at 31st December, and therefore incorporate any changes that may have occurred through the year

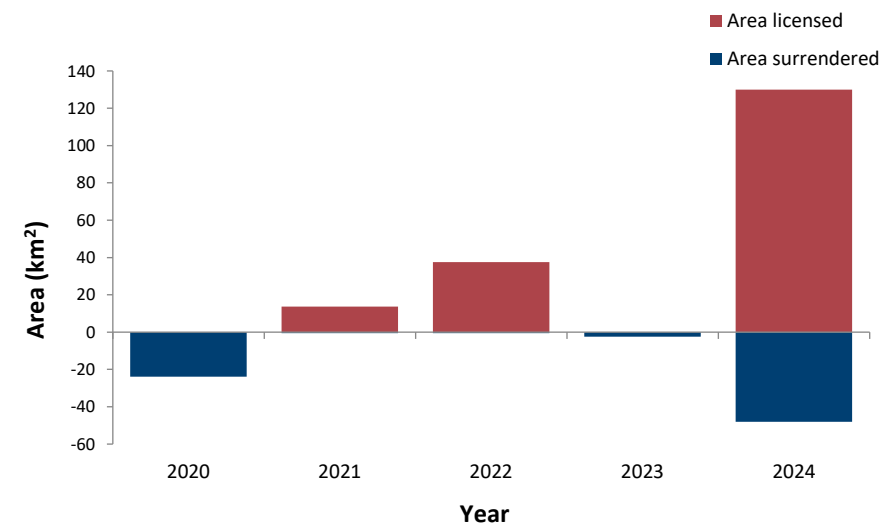
*3 Based on a standardised 6 and 12 nm (UKHO 01/01/05) to allow for accurate comparison between years



Area of seabed licensed and dredged 2020 - 2024



New area licensed versus existing area surrendered 2020 - 2024



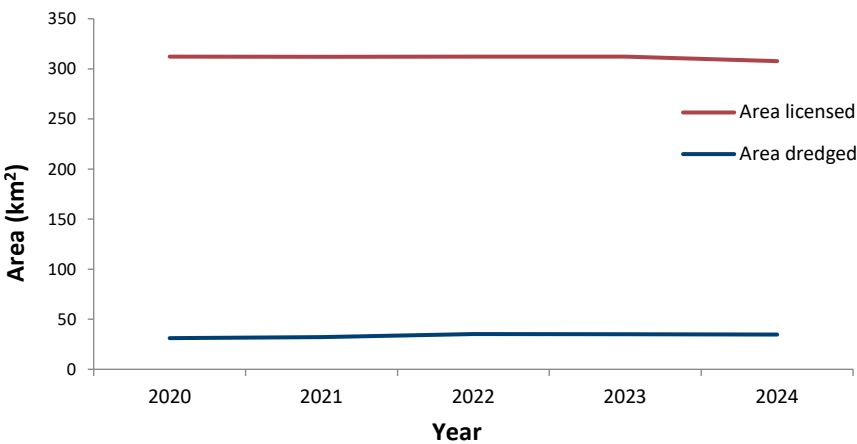
Background

- The Humber region has 10 production licences, operated by CEMEX UK Marine Ltd, DEME Building Materials Ltd, Heidelberg Materials Marine Ltd, Tarmac Marine Ltd, Van Oord UK Ltd and Westminster Gravels Ltd for both sand and gravel, principally for use in the construction industry
- During 2024, 3.32 million tonnes (mt) of construction aggregate were dredged from a permitted licensed tonnage of 6.88 mt. In addition, 0.66 mt were dredged for beach nourishment
- Of the total marine aggregate dredged for construction from the region:
 - 69.4 % was delivered to mainland Europe (2.31 mt)
 - 26.4 % was delivered to the Humber and North East (0.88 mt)
 - 4.2 % was delivered to the Thames Estuary (0.13 mt)

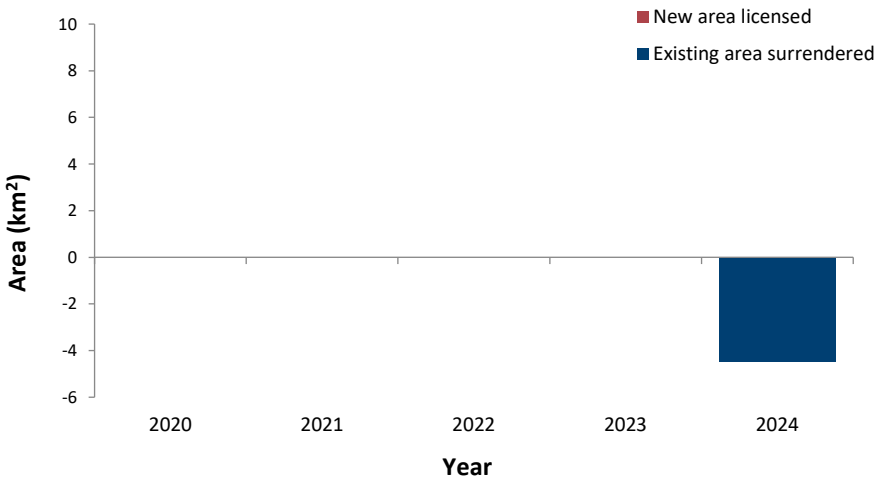
Regional statistics

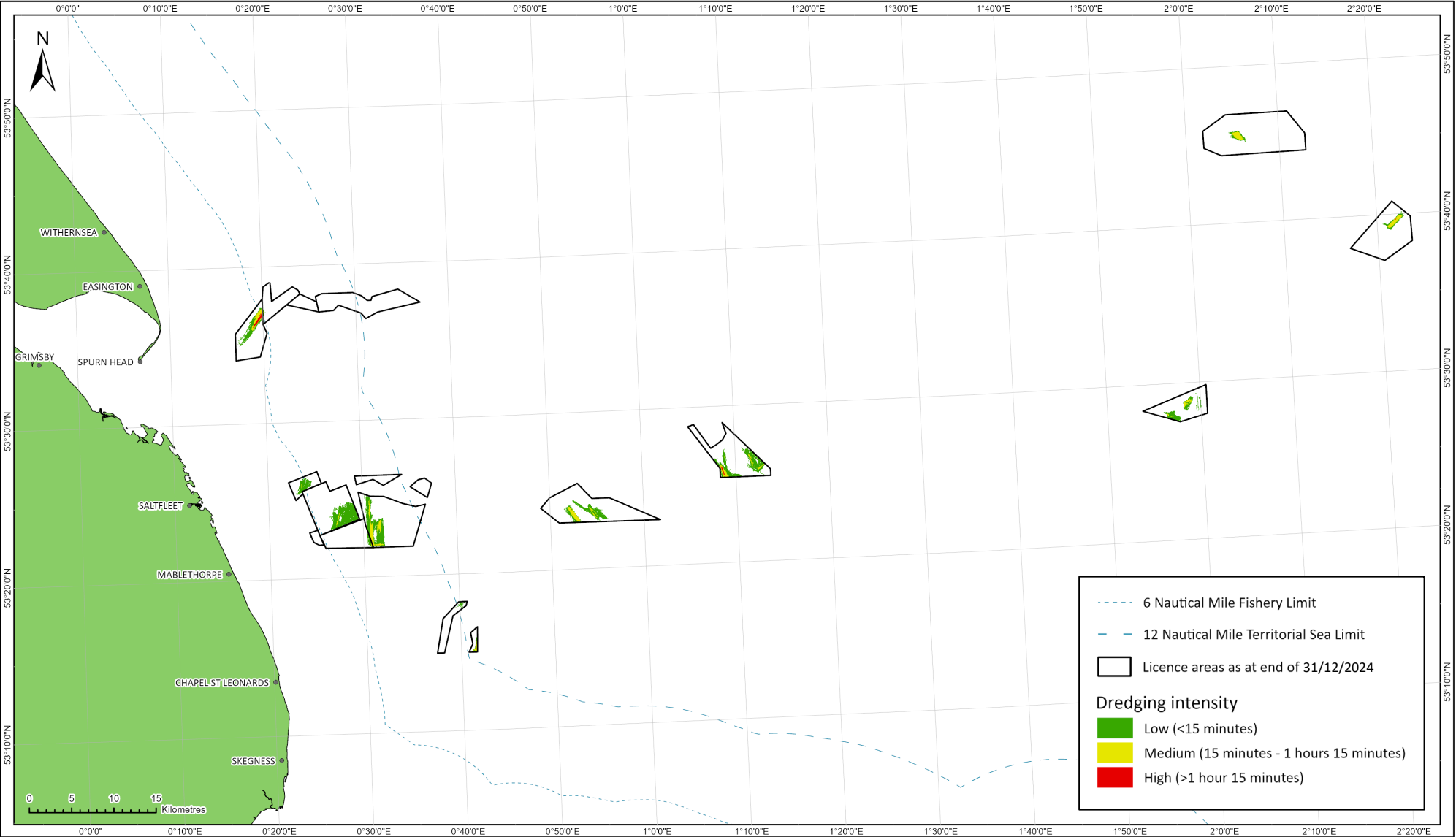
- The licensed area in the region was 307.7 km²
- The total area actually available to be dredged within the region (due to zoning) was 184.3 km²
- Dredging took place within 34.6 km² – 11.2 % of the licensed area
- The area dredged with high intensity (for more than 1 hour 15 minutes in the year) was 0.5 km²
- 90 % of regional dredging effort took place within 17.7 km²
- During 2024, the area licensed for marine aggregate extraction decreased by 4.5 km²

Area of seabed licensed and dredged 2020-2024



New area licensed versus existing area surrendered 2020-2024





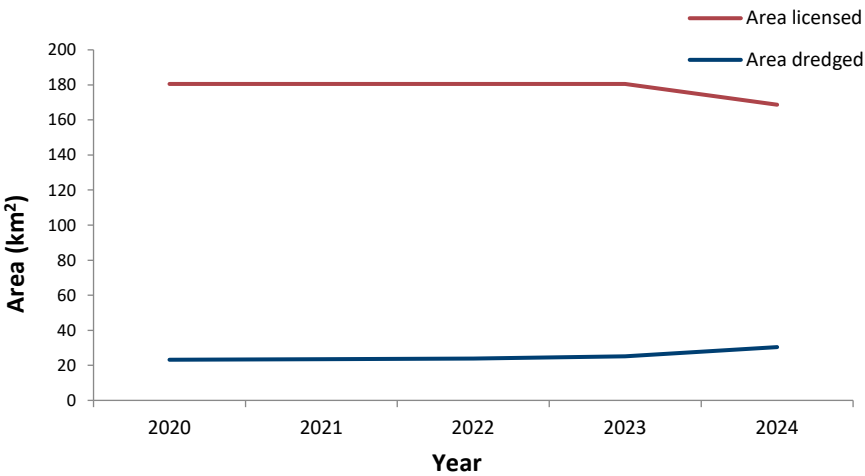
Background

- The East Coast region has 11 production licences, operated by CEMEX UK Marine Ltd, Heidelberg Materials Marine Ltd, Tarmac Marine Ltd and Volker Dredging Ltd for both sand and gravel, principally for use in the construction industry
- During 2024, 3.10 million tonnes (mt) of construction aggregate were dredged from a permitted licensed tonnage of 7.13 mt.
- Of the total marine aggregate dredged for construction from the region:
 - 77.8 % was delivered to the Thames Estuary (2.41 mt)
 - 12.1 % was delivered to mainland Europe (0.38 mt)
 - 8.6 % was delivered to the Humber and North East (0.27 mt)
 - 1.5 % was delivered to the South Coast (0.04 mt)

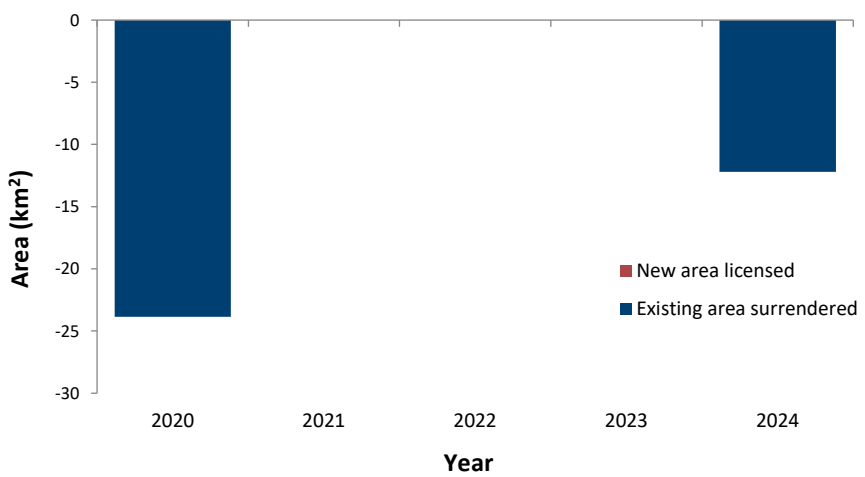
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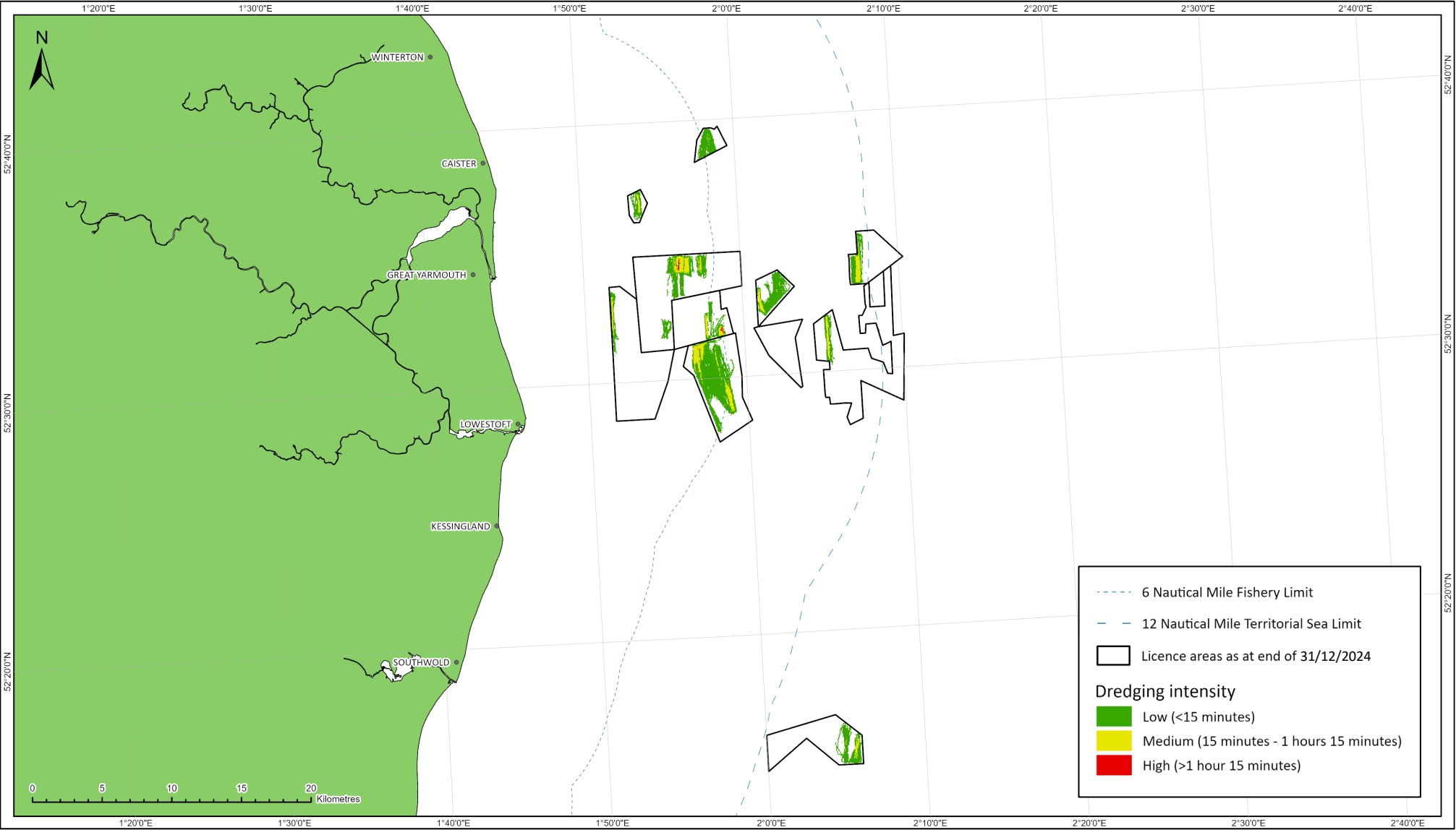
- The licensed area in the region was 168.7 km²
- The total area actually available to be dredged within the region (due to zoning) was 155.1 km²
- Dredging took place within 30.4 km² – 18 % of the licensed area
- The area dredged with high intensity (for more than 1 hour 15 minutes in the year) was 0.1 km²
- 90% of regional dredging effort took place within 17.8 km²
- During 2024, the area licensed for marine aggregate extraction decreased by 12.2 km²

Area of seabed licensed and dredged 2020-2024



New area licensed versus existing area surrendered 2020-2024





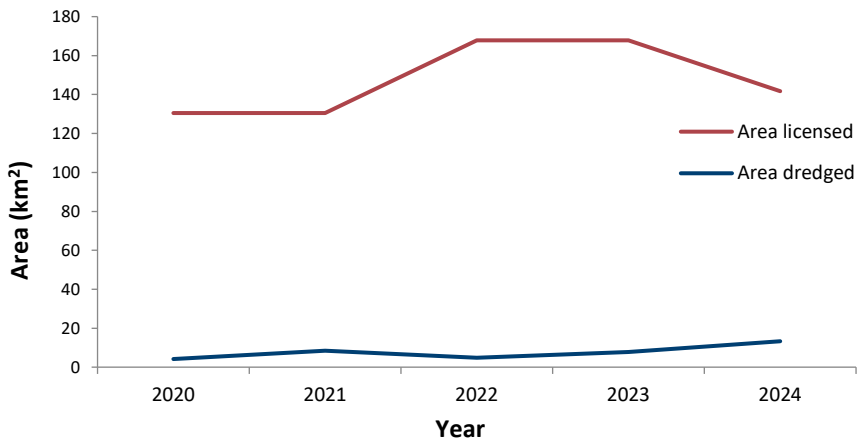
Background

- The Thames Estuary region has 8 production licences, operated by Britannia Aggregates Ltd, CEMEX UK Marine Ltd, Deme Building Materials Ltd, Tarmac Marine Ltd , Volker Dredging Ltd and Westminster Gravels Ltd for both sand and gravel, principally for use in the construction industry
- During 2024, 1.39 million tonnes (mt) of construction aggregate were dredged from a permitted licensed tonnage of 4.70 mt. In addition, 0.54 mt were dredged for reclamation fill
- Of the total marine aggregate dredged for construction from the region:
 - 81.7 % was delivered to the Thames Estuary (1.13 mt)
 - 8.6 % was delivered to mainland Europe (0.12 mt)
 - 3.4 % was delivered to Humber & North East (0.05 mt)
 - 6.3 % was delivered to East English Channel (0.09 mt)

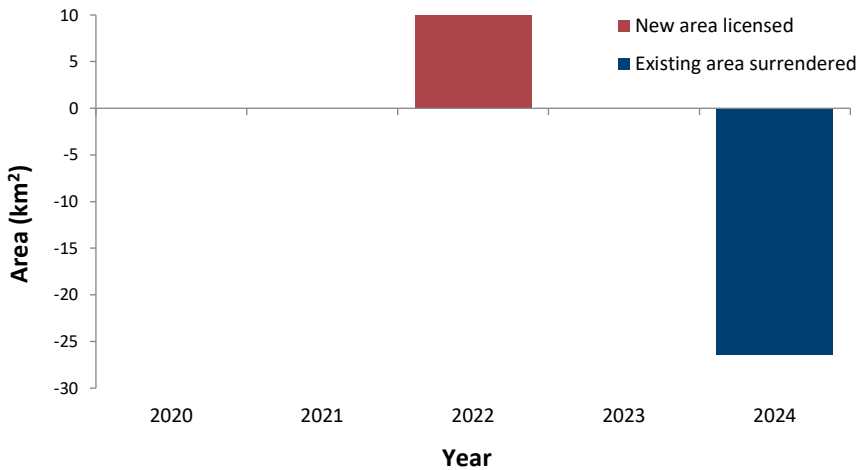
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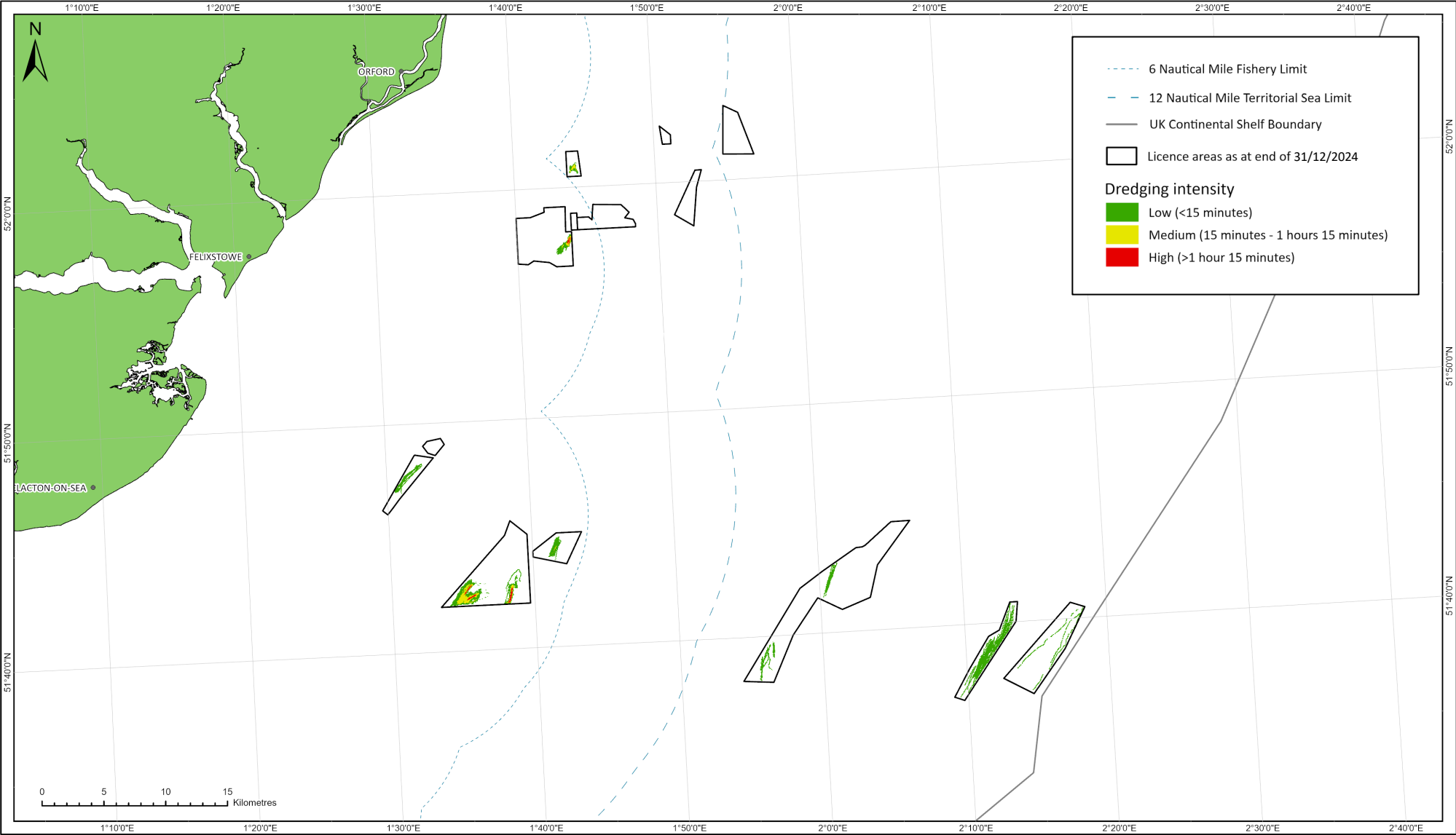
- The licensed area in the region was 141.7 km²
- The total area actually available to be dredged within the region (due to zoning) was 107.1 km²
- Dredging took place within 13.3 km² – 9.4 % of the licensed area
- The area dredged with high intensity (for more than 1 hour 15 minutes in the year) was 0.4 km²
- 90 % of regional dredging effort took place within 5.0 km²
- During 2024, the area licensed for marine aggregate extraction decreased by 26.4 km²

Area of seabed licensed and dredged 2020-2024



New area licensed versus existing area surrendered 2020-2024





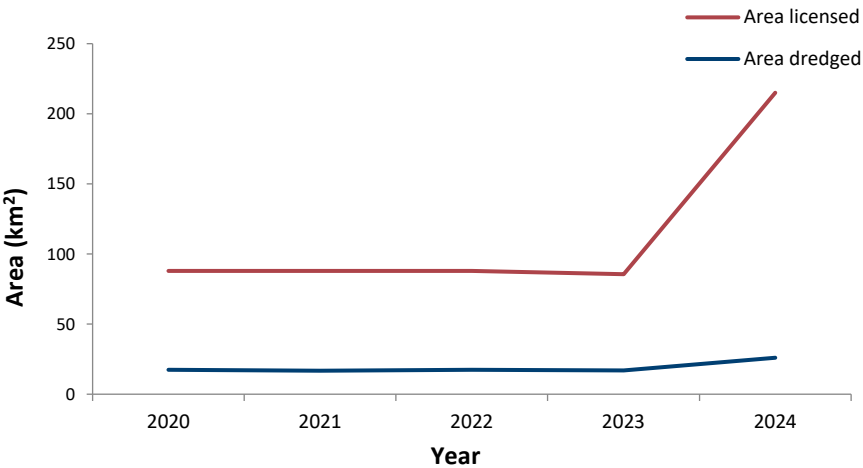
Background

- The East English Channel region has 12 production licences operated by CEMEX UK Marine Ltd, DEME Building Materials Ltd, Heidelberg Materials Marine Ltd, Sea Aggregates Ltd, Tarmac Marine Ltd, Volker Dredging Ltd and Westminster Gravels for sand and gravel, principally for use in the construction industry.
- During 2024, 3.81 million tonnes (mt) of construction aggregate were dredged from a permitted licensed tonnage of 11.97 mt. In addition, 0.57 mt were dredged for reclamation fill
- Of the total marine aggregate dredged for construction from the region:
 - 64.9 % was delivered to the Thames Estuary (2.47 mt)
 - 26.7 % was delivered to mainland Europe (1.02 mt)
 - 5.4 % was delivered to the East Coast (0.21 mt)
 - 2.3 % was delivered to East English Channel (0.09 mt)
 - 0.6 % was delivered to the South Coast (0.02 mt)
 - 0.1 % was delivered to the North East (0.003 mt)

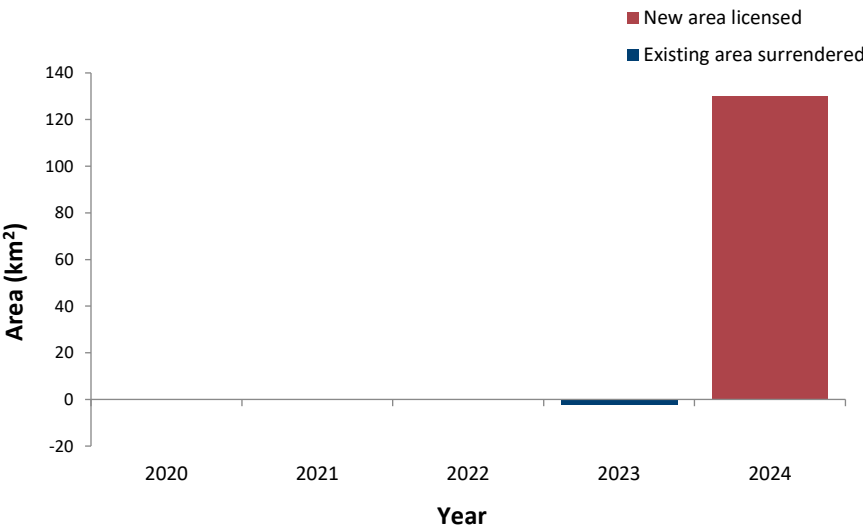
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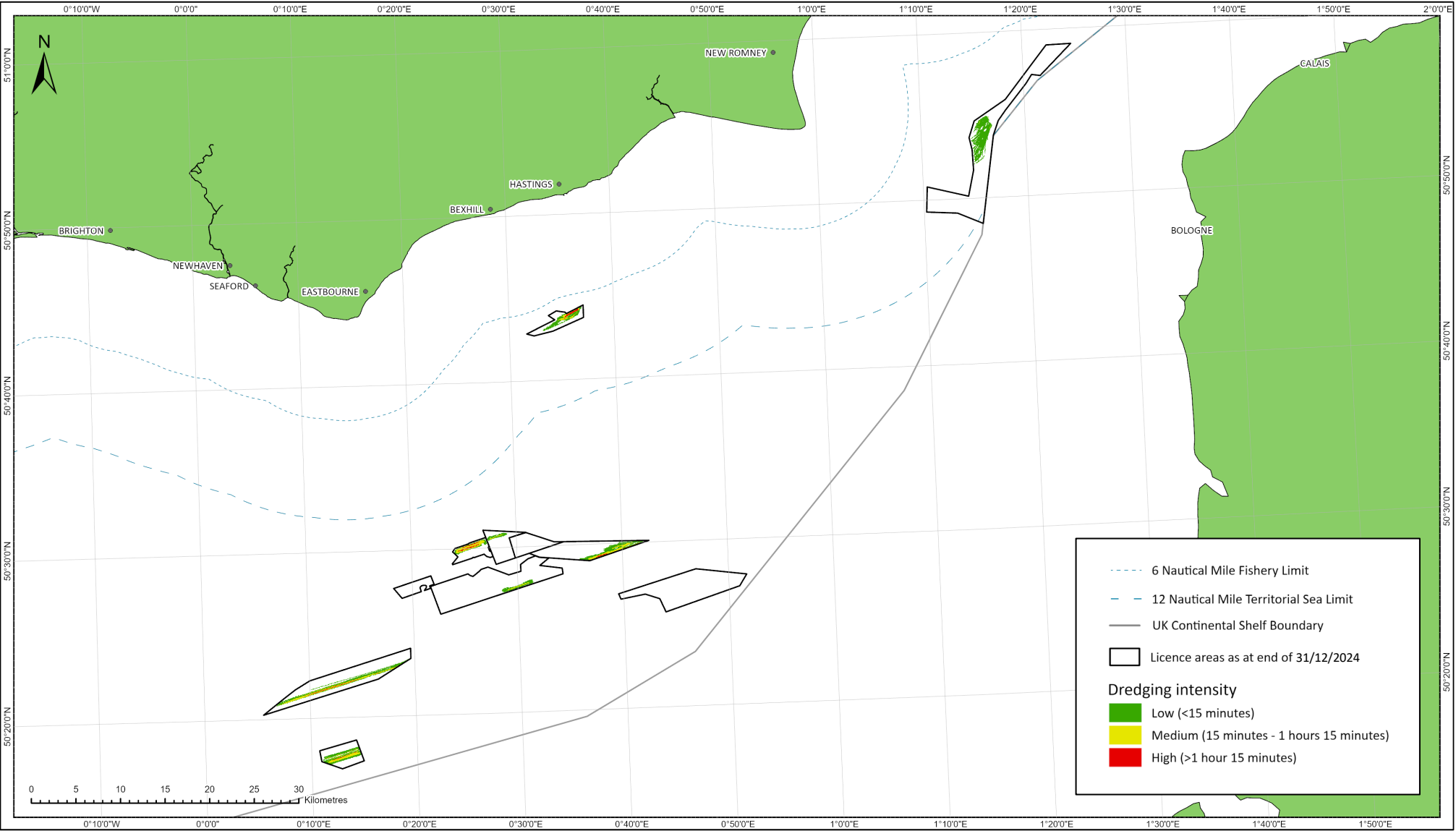
- The licensed area in the region was 215.6 km²
- The total area actually available to be dredged within the region (due to zoning) was 100.5 km²
- Dredging took place within 26 km² – 12.1 % of the licensed area
- The area dredged with high intensity (for more than 1 hour 15 minutes in the year) was 1.1 km²
- 90 % of regional dredging effort took place within 13 km²
- During 2024, the area licensed for marine aggregate extraction increased by 130 km²

Area of seabed licensed and dredged 2020-2024



New area licensed versus existing area surrendered 2020-2024





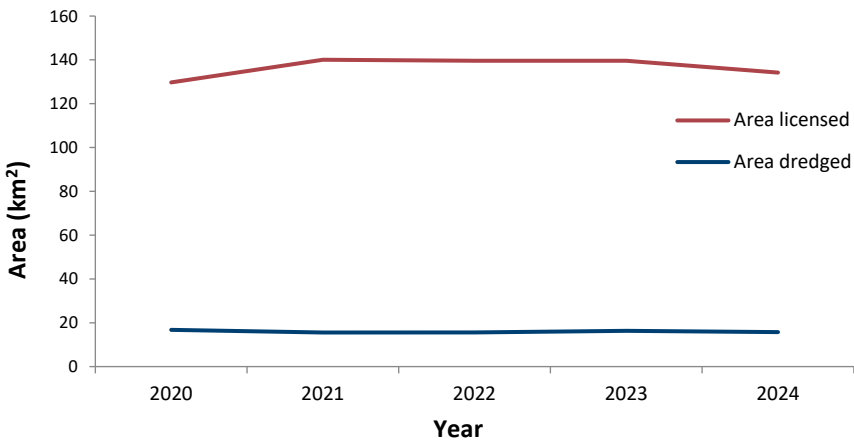
Background

- The South Coast region has 15 production licences, operated by CEMEX UK Marine Ltd, Heidelberg Materials Marine Ltd, Holcim UK Ltd, Tarmac Marine Ltd, Volker Dredging Ltd and Westminster Gravels Ltd for sand and gravel, principally for use in the construction industry
- During 2024, 3.81 million tonnes (mt) of construction aggregate were dredged from a permitted licensed tonnage of 7.58 mt. In addition, 0.03 mt were dredged for beach nourishment.
- Of the total marine aggregate dredged for construction from the region:
 - 61.7 % was delivered to the South Coast (2.35 mt)
 - 19.5 % was delivered to the Thames Estuary (0.74 mt)
 - 11.0 % was delivered to East English Channel (0.42 mt)
 - 4.2 % was delivered to East Coast (0.16 mt)
 - 3.6 % was delivered to mainland Europe (0.14 mt)

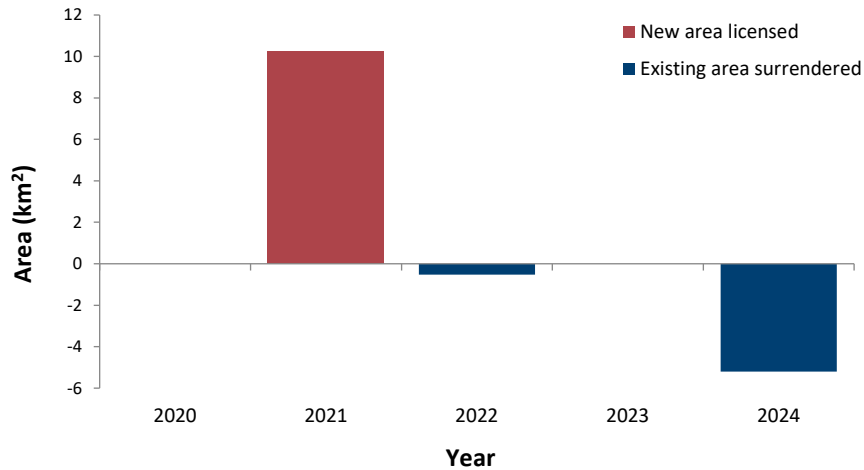
Regional statistics

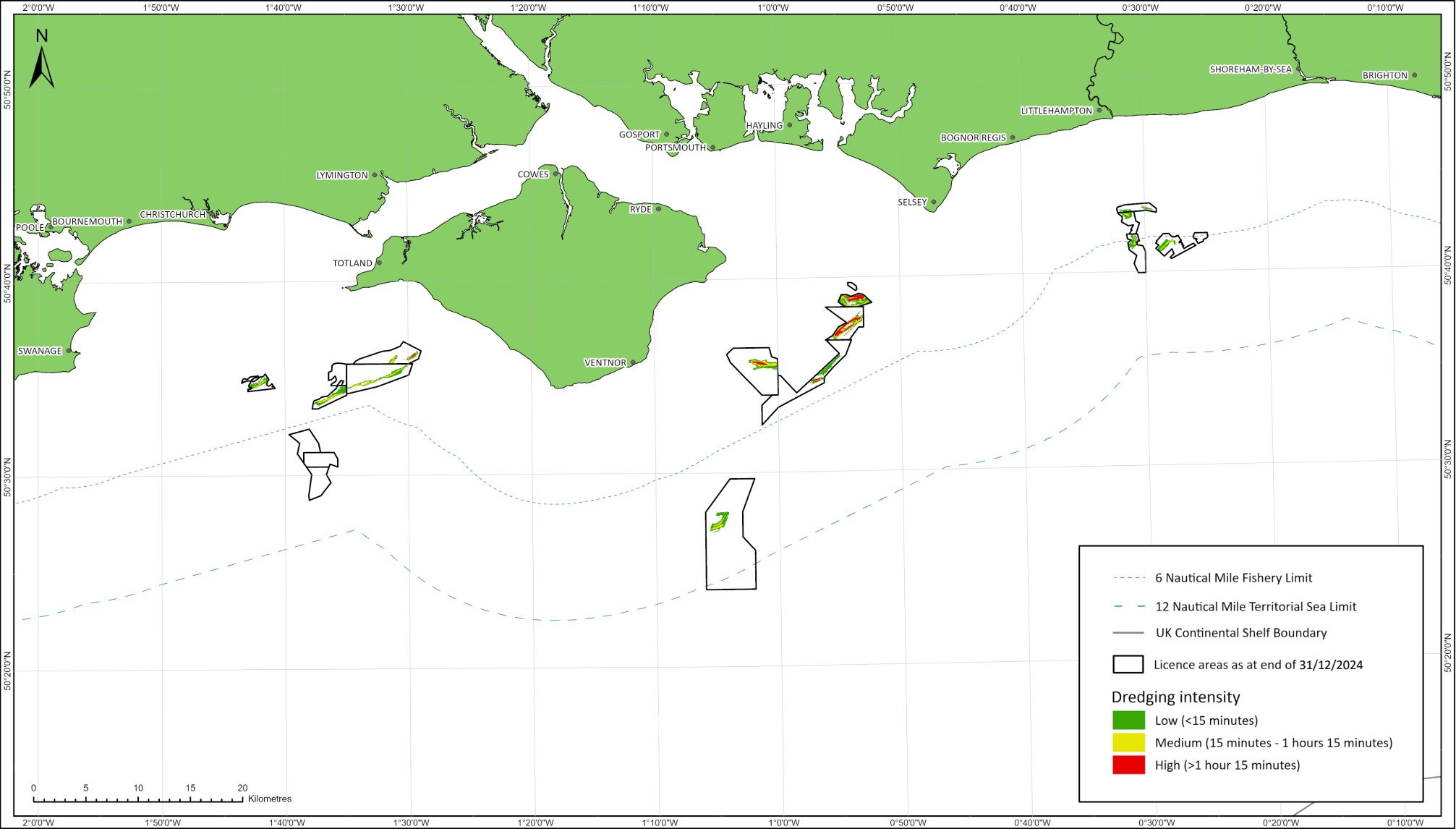
- The licensed area in the region was 134.2 km²
- The total area actually available to be dredged within the region (due to zoning) was 58.7 km²
- Dredging took place within 15.8 km² – 11.8 % of the licensed area
- The area dredged with high intensity (for more than 1 hour 15 minutes in the year) was 1.8 km²
- 90 % of regional dredging effort took place within 6.3 km²
- During 2024, the area licensed for marine aggregate extraction decreased by 5.3 km²

Area of seabed licensed and dredged 2020-2024



New area licensed versus existing area surrendered 2020-2024





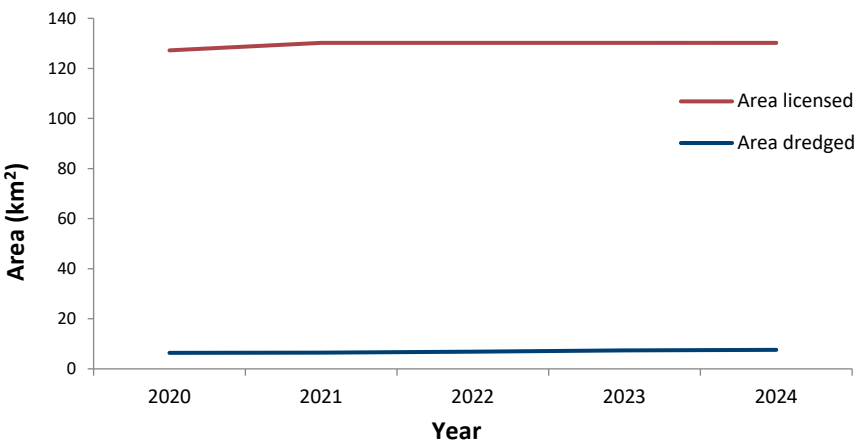
Background

- The South West region has 9 production licences, operated by CEMEX UK Marine Ltd, Heidelberg Materials Marine Ltd, Llanelli Sand Dredging Ltd, Severn Sands Ltd and Tarmac Marine Ltd for sand, principally for use in the construction industry
- During 2024, 1.29 million tonnes (mt) of construction aggregate were dredged from a permitted licensed tonnage of 2.80 mt. In addition, 0.06 mt were dredged for non construction purposes
- Of the total marine aggregate dredged for construction from the region:
 - 99.8 % was delivered to the South West (1.29 mt)
 - 54.4 % of this went to English wharves (0.7 mt)
 - 45.6 % of this went to Welsh wharves (0.59 mt)
- 0.2 % was delivered to the South Coast (0.002 mt)

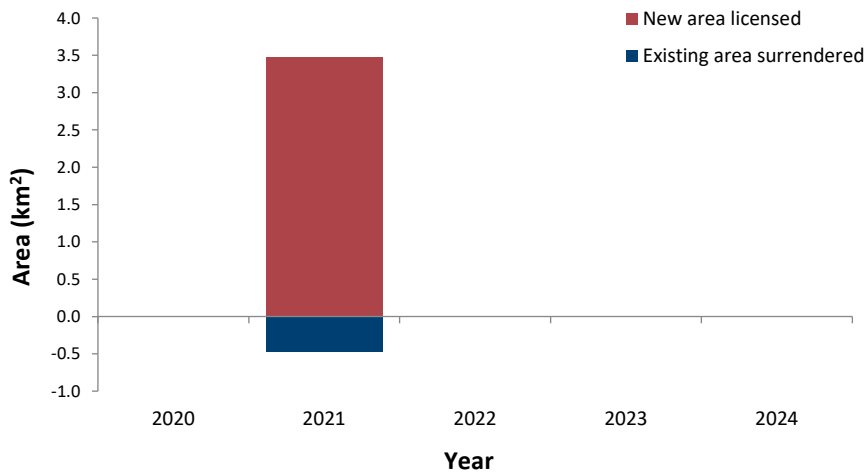
Regional statistics

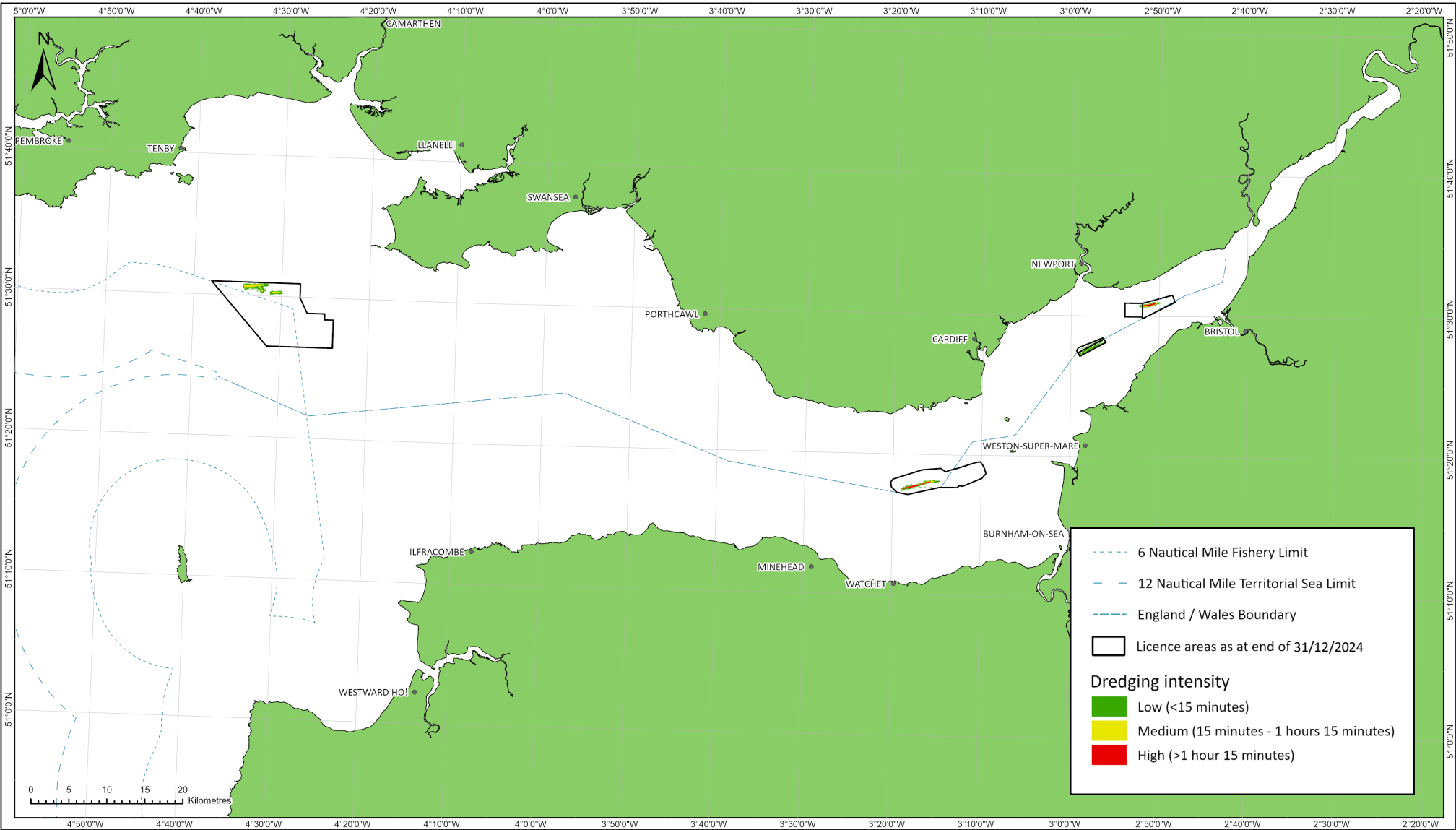
- The licensed area in the region was 130.2 km²
- The total area actually available to be dredged within the region (due to zoning) was 31.1 km²
- Dredging took place within 7.6 km² – 5.8 % of the licensed area
- The area dredged with high intensity (for more than 1 hour 15 minutes in the year) was 0.8 km²
- 90% of regional dredging effort took place within 2.4 km²
- During 2024, the area licensed for marine aggregate extraction remained unchanged

Area of seabed licensed and dredged 2020-2024



New area licensed versus existing area surrendered 2020-2024





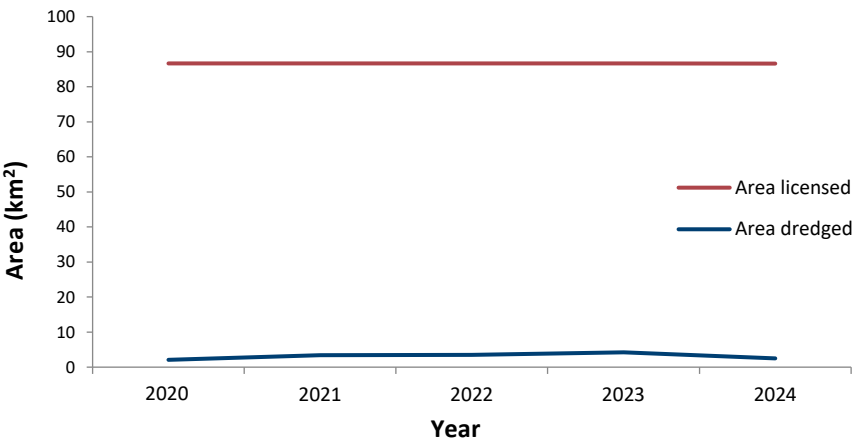
Background

- The North West region has 2 production licences, operated by Mersey Sand Suppliers, and Westminster Gravels Ltd for sand, principally for use in the construction industry
- During 2024, 0.23 million tonnes (mt) of construction aggregate were dredged from a permitted licensed tonnage of 0.90 mt.
- Of the total marine aggregate dredged for construction from the region:
- 100% % of the tonnage dredged was delivered to the North West (0.23 mt)
 - ▢ 97 % of this went to English wharves (0.22 mt)
 - ▢ 3 % of this went to Welsh wharves (0.01 mt)

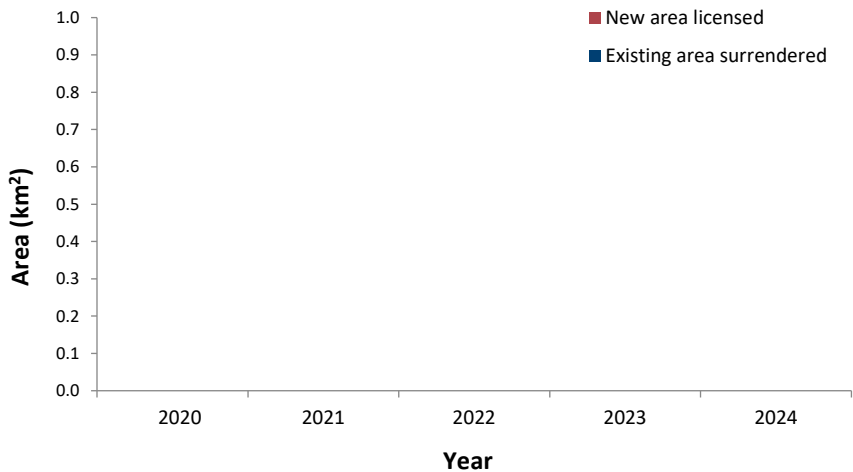
Regional statistics

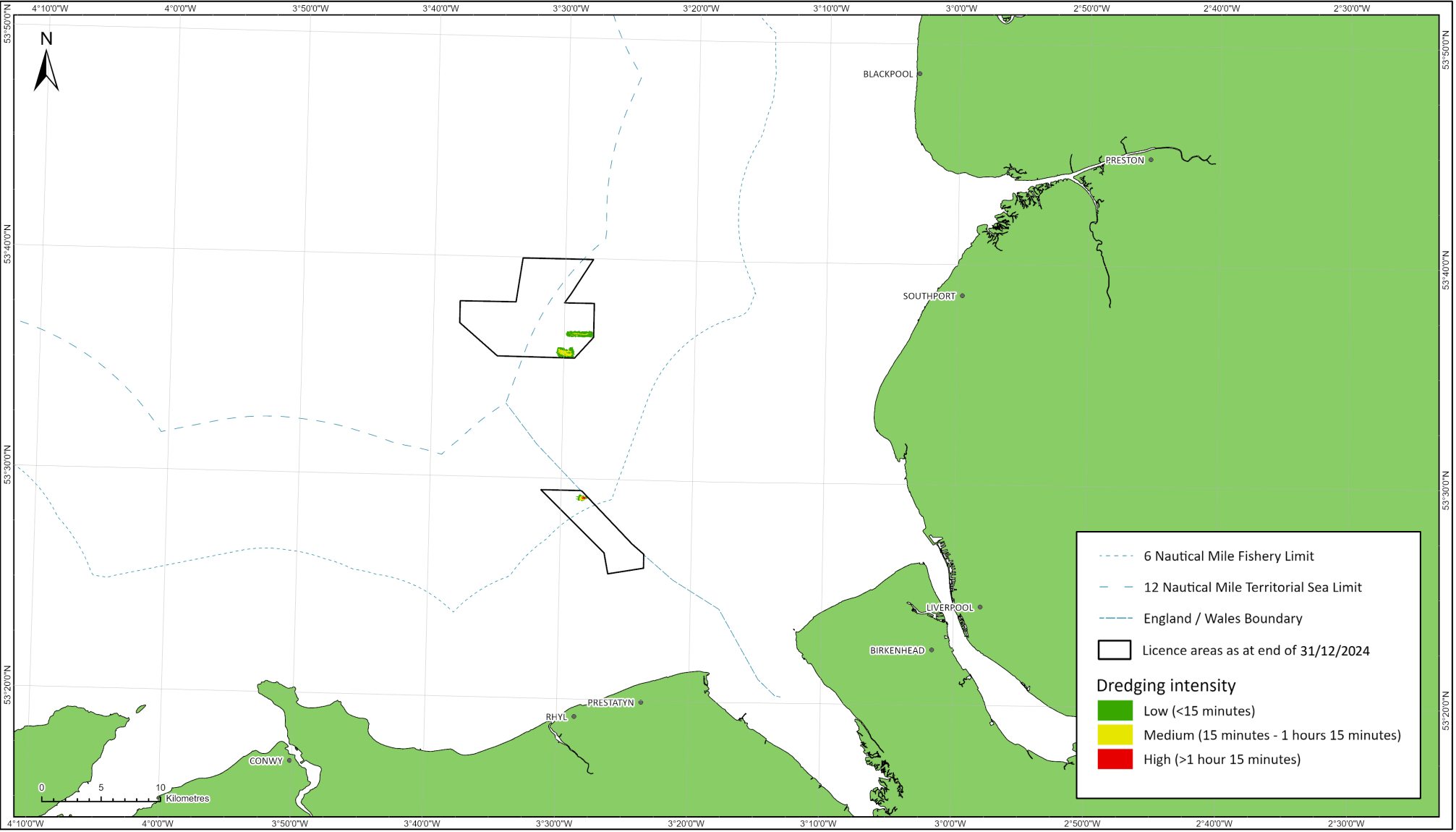
- The licensed area in the region was 86.6 km²
- The total area actually available to be dredged within the region (due to zoning) was 18.6 km²
- Dredging took place within 2.5 km² – 2.9 % of the licensed area
- The area dredged with high intensity (for more than 1 hour 15 minutes in the year) was 0.1 km²
- 90 % of regional dredging effort took place within 1.4 km²
- During 2024, the area licensed for marine aggregate extraction remained unchanged

Area of seabed licensed and dredged 2020-2024



New area licensed versus existing area surrendered 2020-2024





England and Wales have one of the largest and most efficient dredging industries in the world, extracting 15 to 20 million tonnes of sand and gravel from the seabed each year for a variety of uses. These range from housebuilding, to major infrastructure projects like the Thames Tideway Tunnel and Liverpool 2 container terminal, to coastal protection such as the innovative Bacton to Walcott Sandscaping scheme.

Marine aggregates have played an important role in the building industry since the 1960s and today meet over 20 per cent of sand and gravel demand in England and Wales.

The Crown Estate is a £15bn real estate business specialising in commercial property in central London, prime regional retail and offshore wind. It also has a substantial rural and coastal portfolio and manages the seabed around England, Wales and Northern Ireland. Established by an Act of Parliament, as an independent commercial business, it returns 100% of its annual profits to the Treasury for the benefit of the public finances. This has totalled £3bn over the last ten years.

The British Marine Aggregate Producers Association (BMAPA) was formed in 1992 and comprises members of the Mineral Products Association with a marine interest. Marine sand and gravel is supplied to home construction markets, as well as contributing to the balance of payments through exports to Continental Europe. In addition, marine aggregates are fulfilling an increasingly important role by supporting beach replenishment schemes. The marine aggregate industry operates an average of 30 vessels on 65 production licences around the UK as of August 2025.

BMAPA membership (as of August 2025) is comprised of: Britannia Aggregates, Breedon Group, Brett Group, CEMEX UK Marine, DEME Building Materials, Heidelberg Materials Marine, Holcim UK, Norwest Sand & Ballast Co, Sea Aggregates, Tarmac Marine and Volker Dredging.



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