The area involved – 28th annual report

THE CROWN ESTATE

mpa Marine Aggregates



MARINE AGGREGATE EXTRACTION **2025**



The area involved – 28th annual report

Marine aggregate extraction 2025

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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 2025 to 31st December 2025, is the 28th 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 2025 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.

2025 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

18 m tonnes

(19 m tonnes in 2024)

The **area of seabed licensed** decreased to

1131 km²

(1185 km² in 2024)

The **area of seabed dredged** decreased to

123 km²

(130 km² in 2024)

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

5 km²

(5 km² in 2024)

The **percentage of licensed area dredged** remained

11 %

(11 % in 2024)

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

48 km²

(53 km² in 2024)

Summary statistics for 2025

Region	Total area licensed during 2025 (km²)	Total active dredge area for 2025 (km²) *1	Total area dredged during 2025 (km²)
Humber	296.7	156.1	33.7
East Coast	137.1	154.8	30.0
Thames Estuary	116.9	112.4	7.8
East English Channel	240.6	118.6	24.6
South Coast	123.1	57.9	16.7
South West	130.2	31.1	7.6
North West	86.7	18.6	2.3
Total (km²)	**1131.3**	**649.5**	**122.7**

Area of seabed licensed decreased by 54 km² during 2025

Area of seabed licensed (km²) 2021-2025

Year *2	2021	2022	2023	2024	2025
0 – 6 nm*3	354	354	352	337	306
6 – 12 nm*3	325	325	325	368	337
> 12 nm*3	389	426	426	480	488
Total area licensed (km²)	1068	1105	1103	1185	1131
Total active dredge area (km²)	550	581	629	655	650

Area of seabed dredged decreased by 7 km² during 2025

Area of seabed dredged (km²) 2021-2025

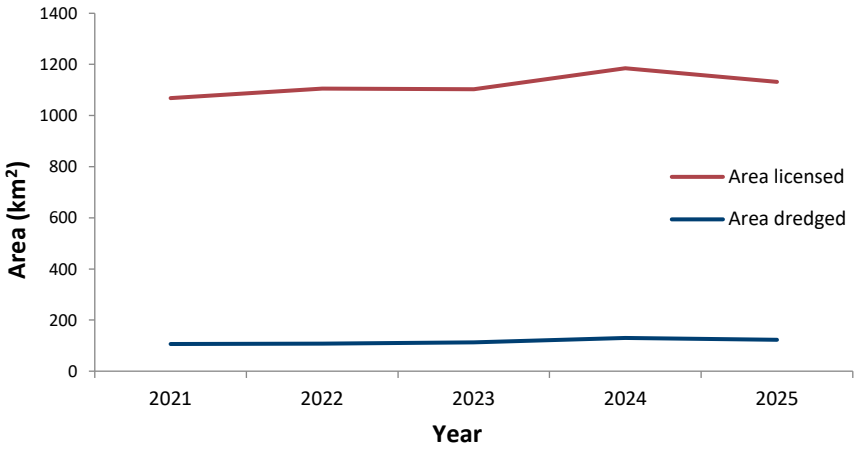
Year	2021	2022	2023	2024	2025
0 – 6 nm*3	40	42	50	49	49
6 – 12 nm*3	31	29	31	38	32
> 12 nm*3	35	36	32	43	42
Total (km²)	106	107	113	130	123
Area dredged >1 hr 15 mins (km²)	6.4	6.9	5.8	4.8	5.4
90 % of dredging effort (km²)	43.0	43.6	42.1	53	47.9

*1 Total area actually available to be dredged due to zoning, calculated on a cumulative basis, and so may be larger than licensed area
*2 Annual figures are calculated as at 31st December, and therefore incorporate any changes that may have occurred through the year
*3 Based on standardised 6 and 12 nautical mile limits (UKHO 01/01/05) to allow for accurate comparison between years

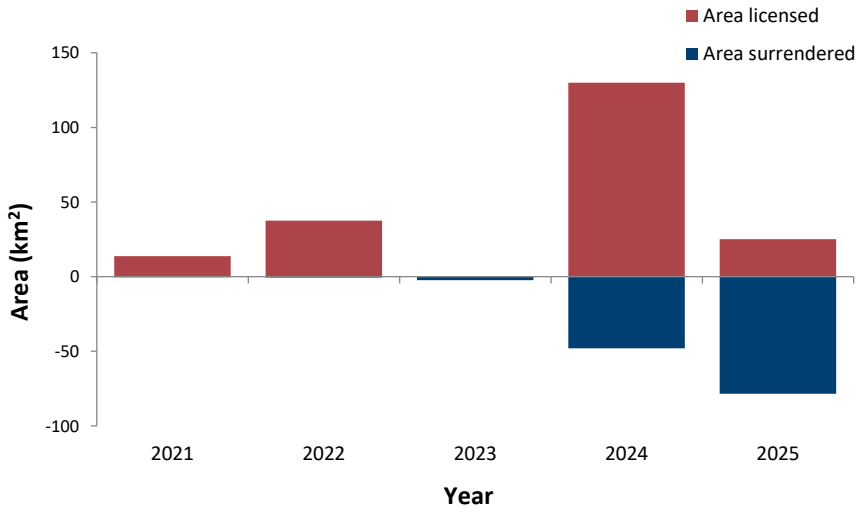


Summary statistics for 2025

Area of seabed licensed and dredged 2021-2025



New area licensed versus existing area surrendered 2021-2025

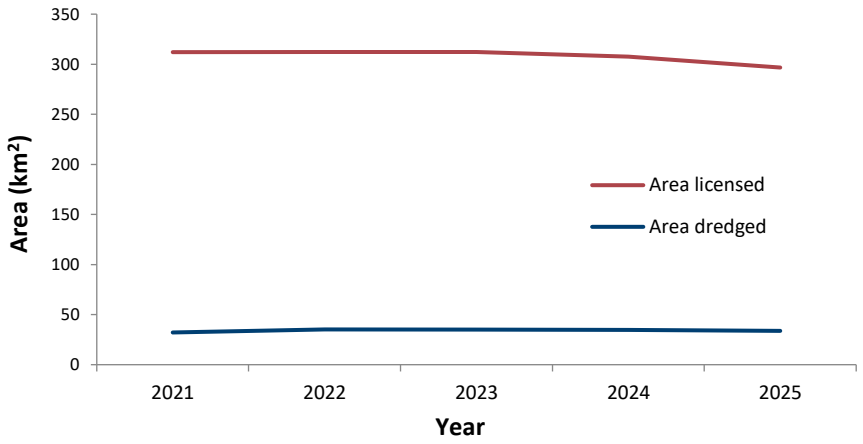




Background

- The Humber region has 9 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 2025, 3.27 million tonnes (mt) of construction aggregate were dredged from a permitted licensed tonnage of 6.88 mt. In addition, 0.43 mt were dredged for beach nourishment
- Of the total marine aggregate dredged for construction from the region:
  - 71.8 % was delivered to mainland Europe (2.35 mt)
  - 25.5 % was delivered to the Humber and North East (0.83 mt)
  - 2.5 % was delivered to the Thames Estuary (0.08 mt)
  - 0.2 % was delivered to the South Coast (0.01 mt)

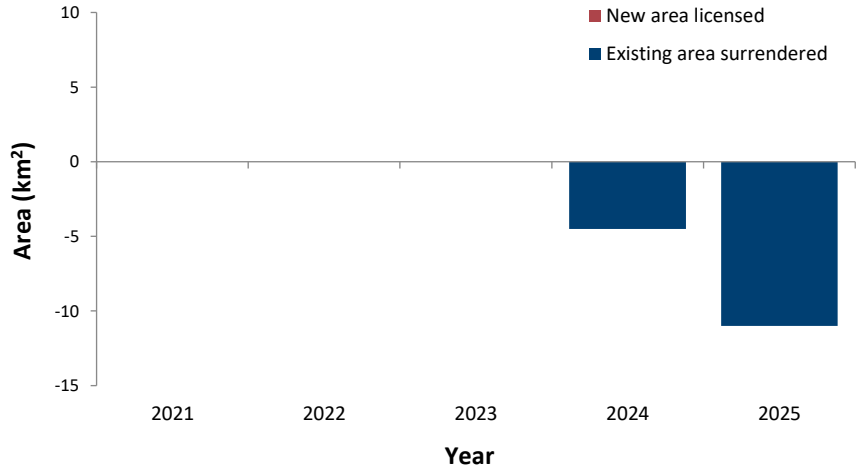
Area of seabed licensed and dredged 2021-2025

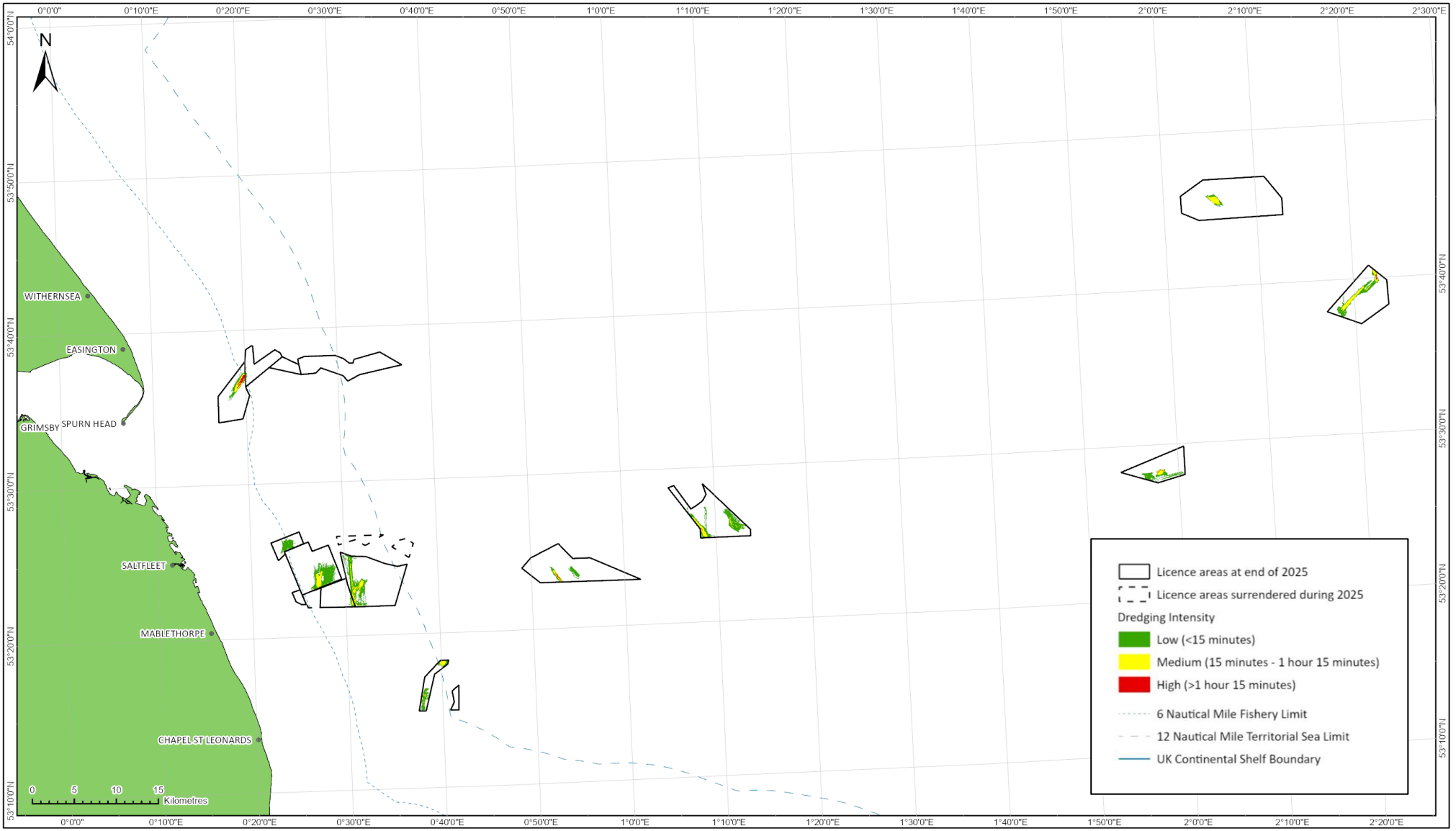


Regional statistics

- The licensed area in the region was 296.7 km²
- The total area actually available to be dredged within the region (due to zoning) was 156.1 km²
- Dredging took place within 33.7 km² – 11.4 % 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 15.0 km²
- During 2025, the area licensed for marine aggregate extraction decreased by 11.0 km²

New area licensed versus existing area surrendered 2021-2025



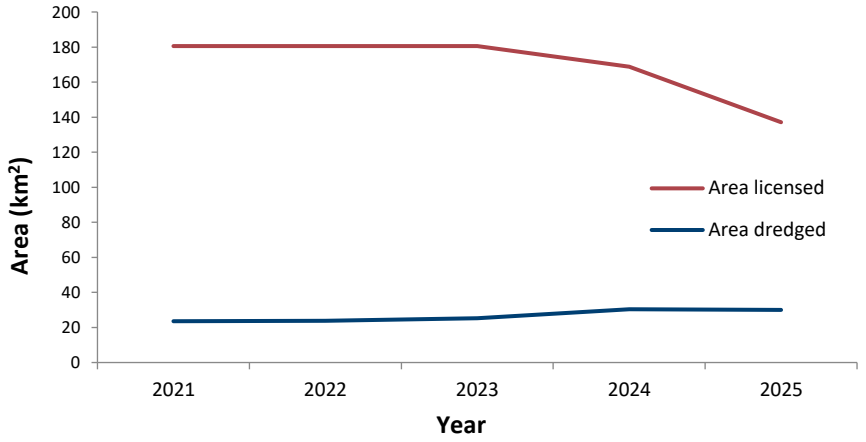

N
WITHERNSEA
EASINGTON
GRIMSBY
SPURN HEAD
SALTFLEET
MABLETHORPE
CHAPEL ST LEONARDS
0 5 10 15
Kilometres
Licence areas at end of 2025
Licence areas surrendered during 2025
Dredging Intensity
Low (<15 minutes)
Medium (15 minutes - 1 hour 15 minutes)
High (>1 hour 15 minutes)
6 Nautical Mile Fishery Limit
12 Nautical Mile Territorial Sea Limit
UK Continental Shelf Boundary

East Coast region

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 2025, 3.05 million tonnes (mt) of construction aggregate were dredged from a permitted licensed tonnage of 6.13 mt.
- Of the total marine aggregate dredged for construction from the region:
  - 65.8 % was delivered to the Thames Estuary (2.01 mt)
  - 24.2 % was delivered to mainland Europe (0.74 mt)
  - 8.0 % was delivered to the Humber and North East (0.24 mt)
  - 1.6 % was delivered to the South Coast (0.05 mt)
  - 0.3 % was delivered to the East Coast (0.01 mt)
  - 0.1 % was delivered to the East English Channel (0.004 mt)

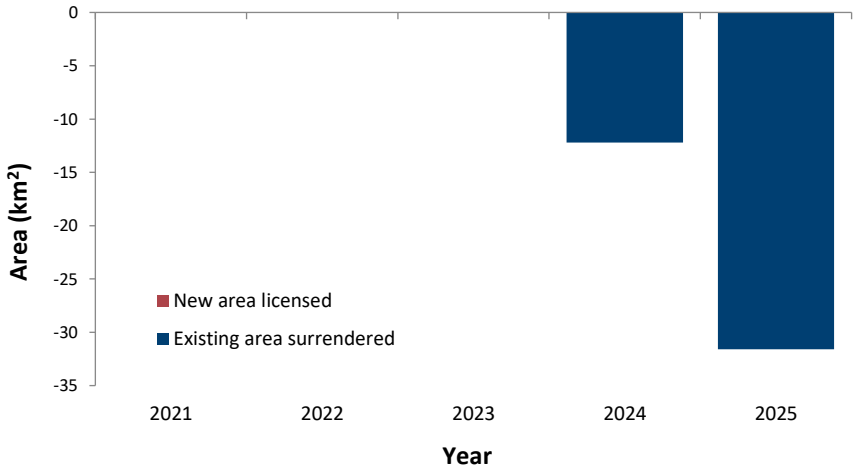
Area of seabed licensed and dredged 2021-2025

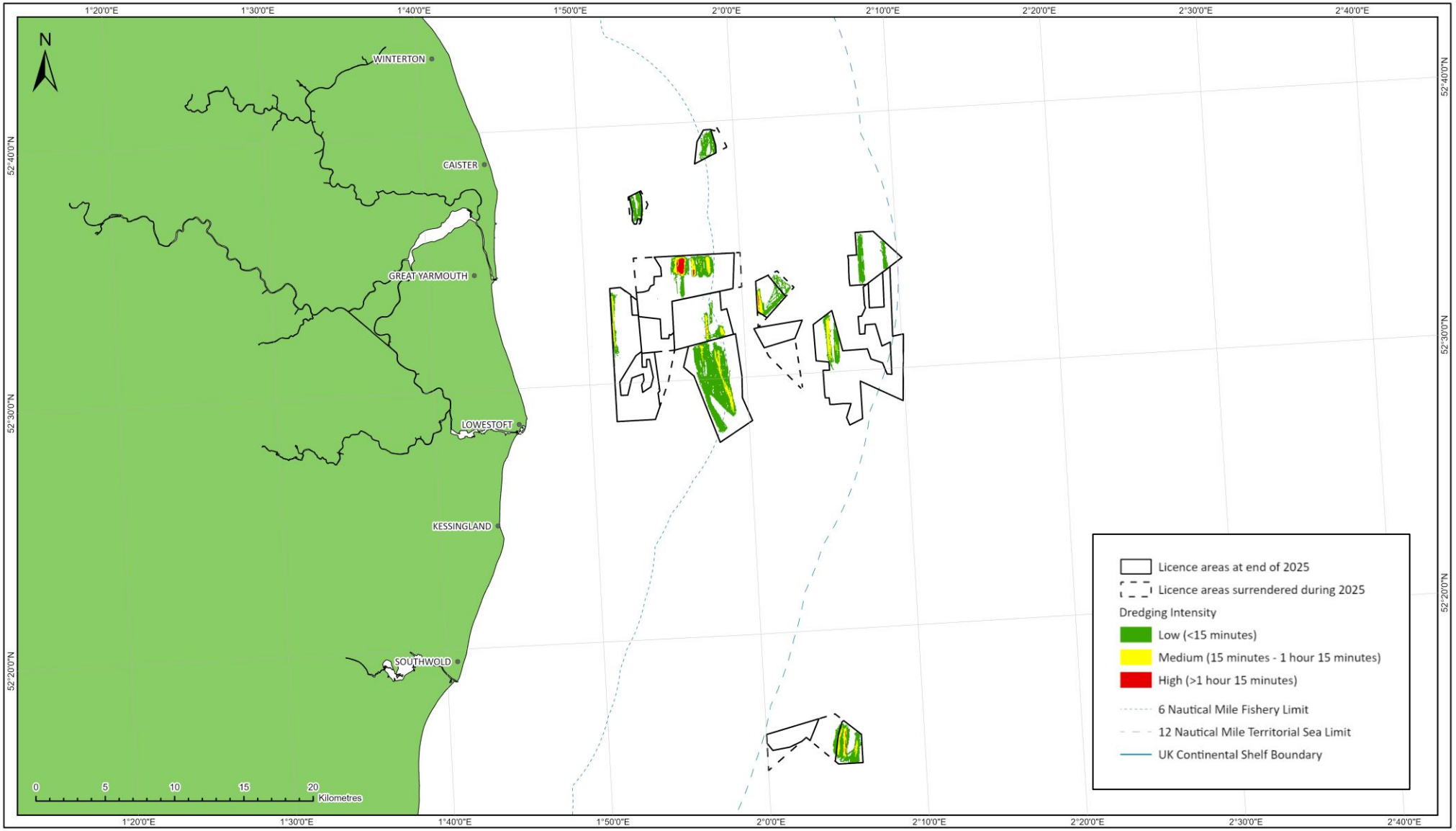


Regional statistics

- The licensed area in the region was 137.1 km²
- The total area actually available to be dredged within the region (due to zoning) was 154.8 km²
- Dredging took place within 30.0 km² – 21.9 % of the licensed area
- The area dredged with high intensity (for more than 1 hour 15 minutes in the year) was 0.7 km²
- 90 % of regional dredging effort took place within 13.3 km²
- During 2025, the area licensed for marine aggregate extraction decreased by 31.6 km²

New area licensed versus existing area surrendered 2021-2025



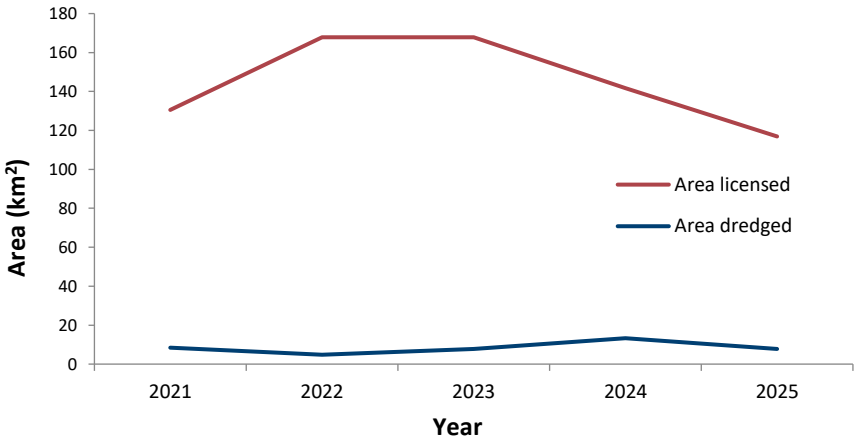

1°20'0"E
1°30'0"E
1°40'0"E
1°50'0"E
2°0'0"E
2°10'0"E
2°20'0"E
2°30'0"E
2°40'0"E
52°40'0"N
52°30'0"N
52°20'0"N
N
WINTERTON
CAISTER
GREAT YARMOUTH
LOWESTOFT
KESSINGLAND
SOUTHWOLD
0
5
10
15
20
Kilometres
Licence areas at end of 2025
Licence areas surrendered during 2025
Dredging Intensity
Low (<15 minutes)
Medium (15 minutes - 1 hour 15 minutes)
High (>1 hour 15 minutes)
6 Nautical Mile Fishery Limit
12 Nautical Mile Territorial Sea Limit
UK Continental Shelf Boundary

Thames Estuary region

Background

- The Thames Estuary region has 6 production licences, operated by Britannia Aggregates Ltd, CEMEX UK Marine Ltd, DEME Building Materials Ltd, Tarmac Marine Ltd and Westminster Gravels Ltd for both sand and gravel, principally for use in the construction industry
- During 2025, 1.75 million tonnes (mt) of construction aggregate were dredged from a permitted licensed tonnage of 3.20 mt
- Of the total marine aggregate dredged for construction from the region:
  - 83.0 % was delivered to the Thames Estuary (1.46 mt)
  - 9.9 % was delivered to the East English Channel (0.17 mt)
  - 2.4 % was delivered to the South Coast (0.04 mt)
  - 2.2 % was delivered to the Humber and North East (0.04 mt)
  - 1.9 % was delivered to mainland Europe (0.03 mt)
  - 0.5 % was delivered to the East Coast (0.01 mt)

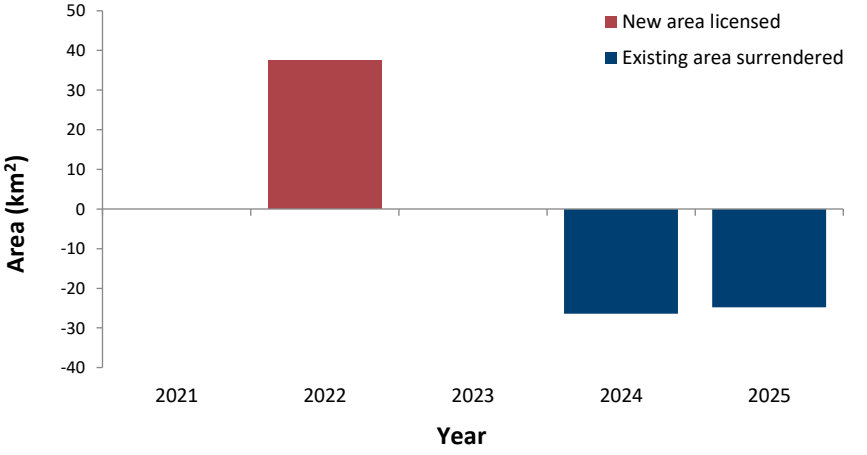
Area of seabed licensed and dredged 2021-2025

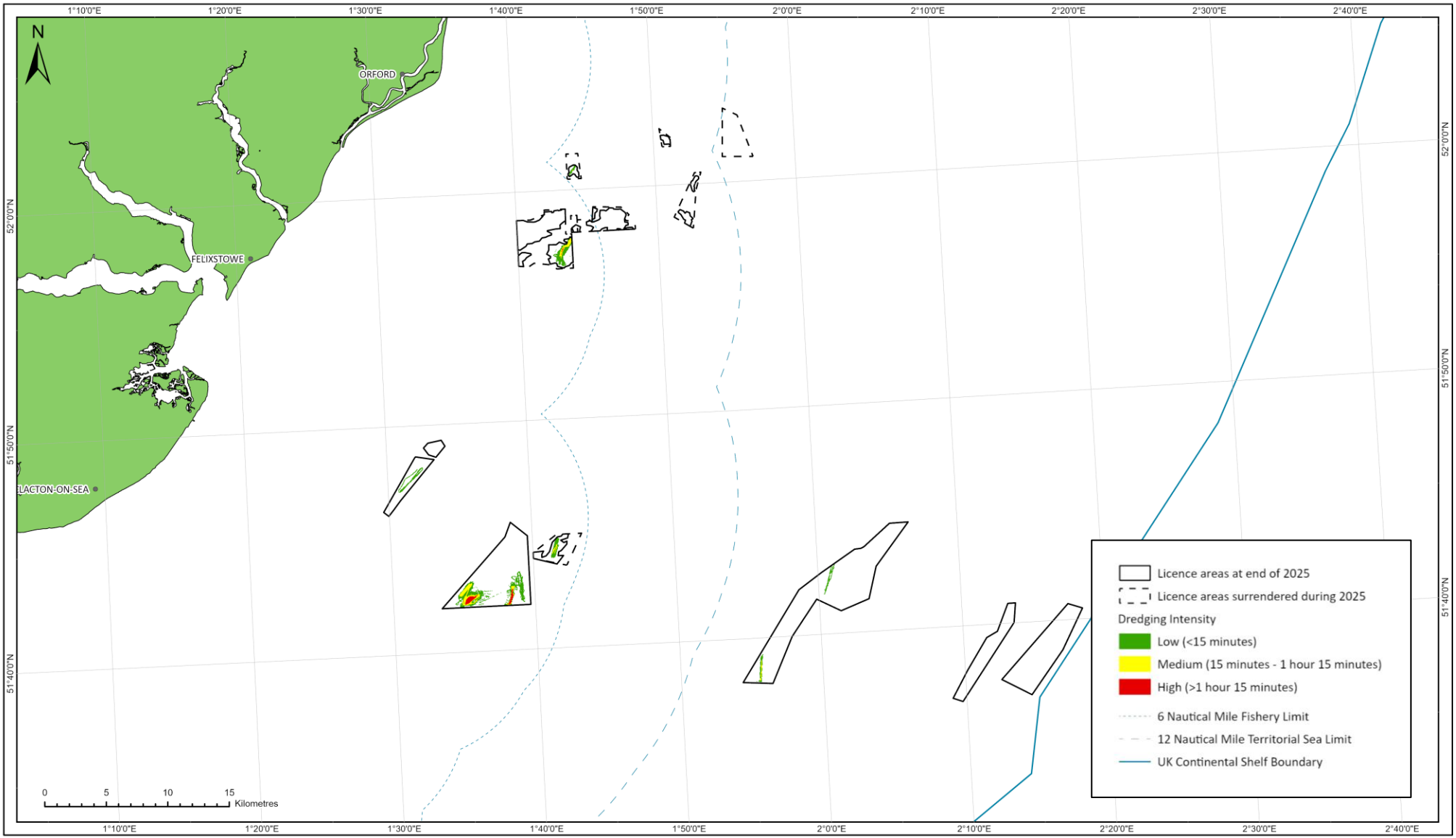


Regional statistics

- The licensed area in the region was 116.9 km²
- The total area actually available to be dredged within the region (due to zoning) was 112.4 km²
- Dredging took place within 7.8 km² – 6.7 % of the licensed area
- The area dredged with high intensity (for more than 1 hour 15 minutes in the year) was 0.6 km²
- 90 % of regional dredging effort took place within 2.3 km²
- During 2025, the area licensed for marine aggregate extraction decreased by 24.8 km²

New area licensed versus existing area surrendered 2021-2025



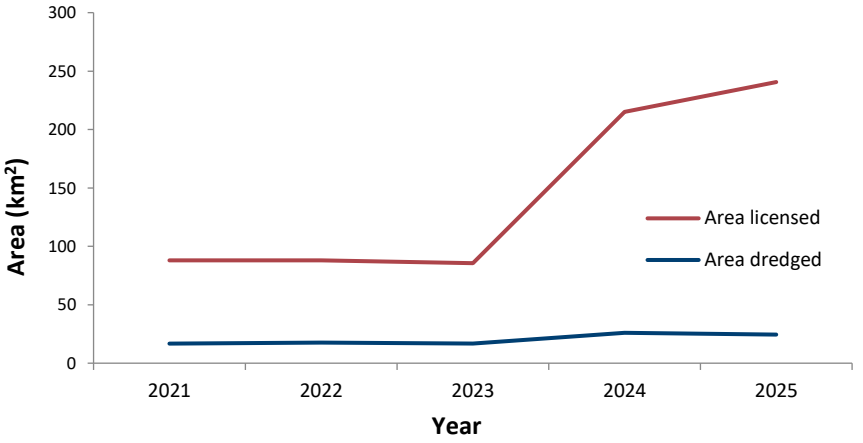

1°10'0"E
1°20'0"E
1°30'0"E
1°40'0"E
1°50'0"E
2°0'0"E
2°10'0"E
2°20'0"E
2°30'0"E
2°40'0"E
52°0'0"N
51°50'0"N
51°40'0"N
N
ORFORD
FELIXSTOWE
LACTON-ON-SEA
0
5
10
15
Kilometres
Licence areas at end of 2025
Licence areas surrendered during 2025
Dredging Intensity
Low (<15 minutes)
Medium (15 minutes - 1 hour 15 minutes)
High (>1 hour 15 minutes)
6 Nautical Mile Fishery Limit
12 Nautical Mile Territorial Sea Limit
UK Continental Shelf Boundary

East English Channel region

Background

- The East English Channel region has 14 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 Ltd for sand and gravel, principally for use in the construction industry
- During 2025, 3.46 million tonnes (mt) of construction aggregate were dredged from a permitted licensed tonnage of 12.17 mt
- Of the total marine aggregate dredged for construction from the region:
  - 58.1 % was delivered to the Thames Estuary (2.01 mt)
  - 28.5 % was delivered to mainland Europe (0.99 mt)
  - 6.6 % was delivered to the East Coast (0.23 mt)
  - 6.6 % was delivered to the East English Channel (0.23 mt)
  - 0.2 % was delivered to the South Coast (0.01 mt)

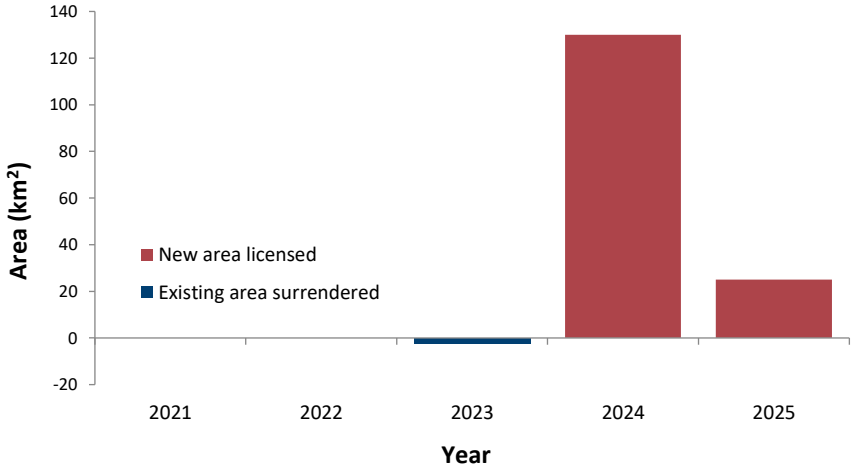
Area of seabed licensed and dredged 2021-2025

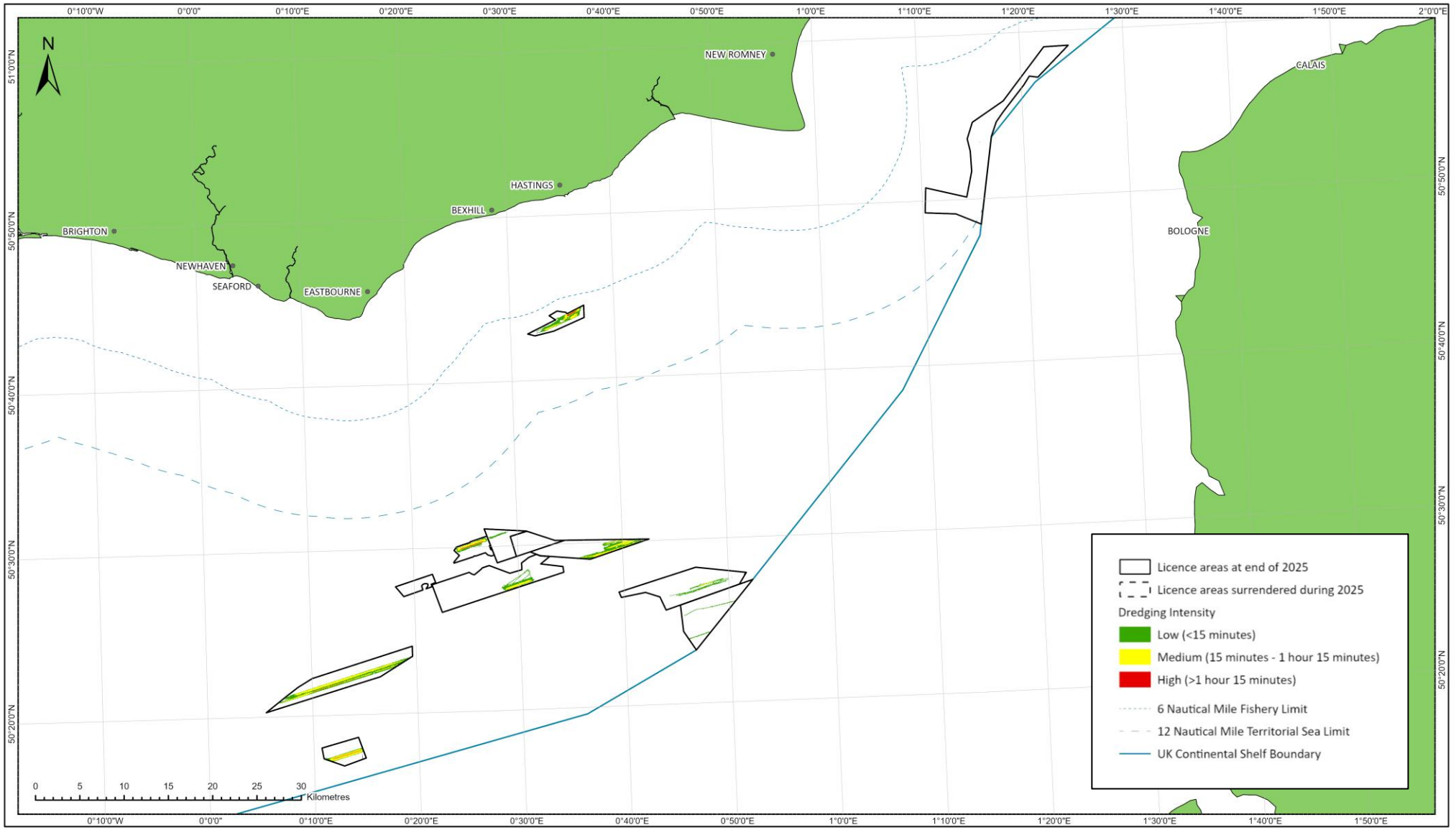


Regional statistics

- The licensed area in the region was 240.6 km²
- The total area actually available to be dredged within the region (due to zoning) was 118.6 km²
- Dredging took place within 24.6 km² – 10.2 % of the licensed area
- The area dredged with high intensity (for more than 1 hour 15 minutes in the year) was 0.7 km²
- 90 % of regional dredging effort took place within 11.9 km²
- During 2025, the area licensed for marine aggregate extraction increased by 25.0 km²

New area licensed versus existing area surrendered 2021-2025




N
NEW ROMNEY
GALAIS
HASTINGS
BEXHILL
BRIGHTON
BOLOGNE
NEWHAVEN
SEAFORD
EASTBOURNE
0°10'0"W
0°0'0"
0°10'0"E
0°20'0"E
0°30'0"E
0°40'0"E
0°50'0"E
1°0'0"E
1°10'0"E
1°20'0"E
1°30'0"E
1°40'0"E
1°50'0"E
2°0'0"E
51°0'0"N
50°50'0"N
50°40'0"N
50°30'0"N
50°20'0"N
0 5 10 15 20 25 30
Kilometres
Licence areas at end of 2025
Licence areas surrendered during 2025
Dredging Intensity
Low (<15 minutes)
Medium (15 minutes - 1 hour 15 minutes)
High (>1 hour 15 minutes)
6 Nautical Mile Fishery Limit
12 Nautical Mile Territorial Sea Limit
UK Continental Shelf Boundary

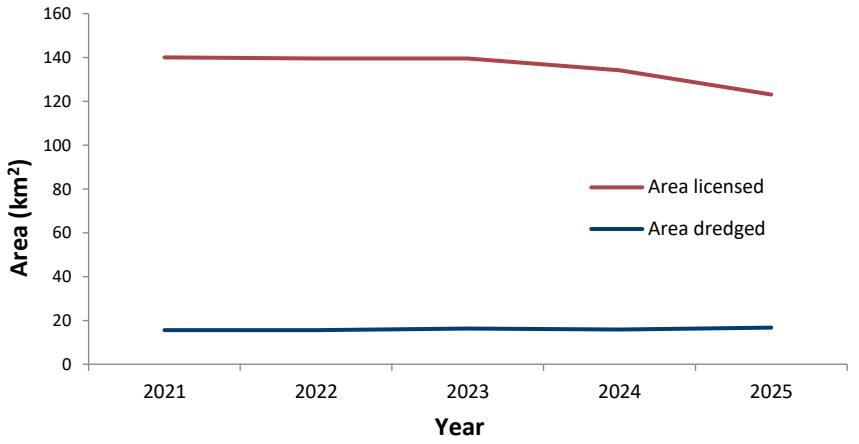
Background

- 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 2025, 3.75 million tonnes (mt) of construction aggregate were dredged from a permitted licensed tonnage of 7.48 mt. In addition, 1.03 mt were dredged for beach nourishment
- Of the total marine aggregate dredged for construction from the region:
  - 65.7 % was delivered to the South Coast (2.46 mt)
  - 17.8 % was delivered to the Thames Estuary (0.67 mt)
  - 9.8 % was delivered to the East English Channel (0.37 mt)
  - 4.5 % was delivered to the East Coast (0.17 mt)
  - 2.2 % was delivered to mainland Europe (0.08 mt)

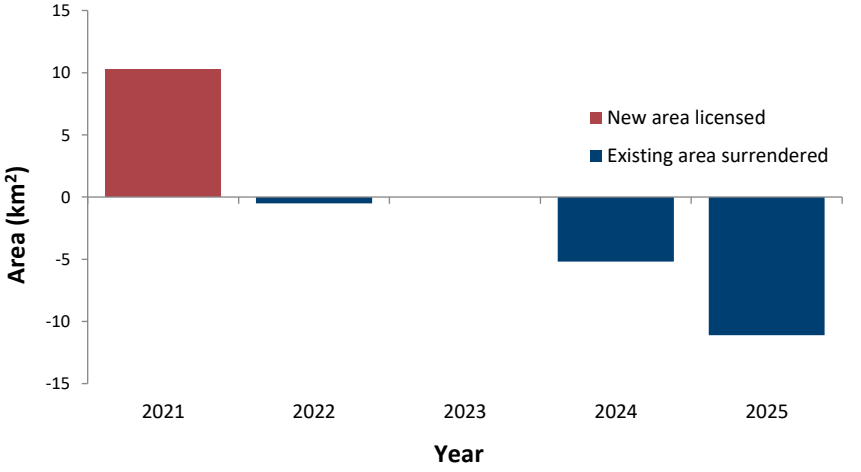
Regional statistics

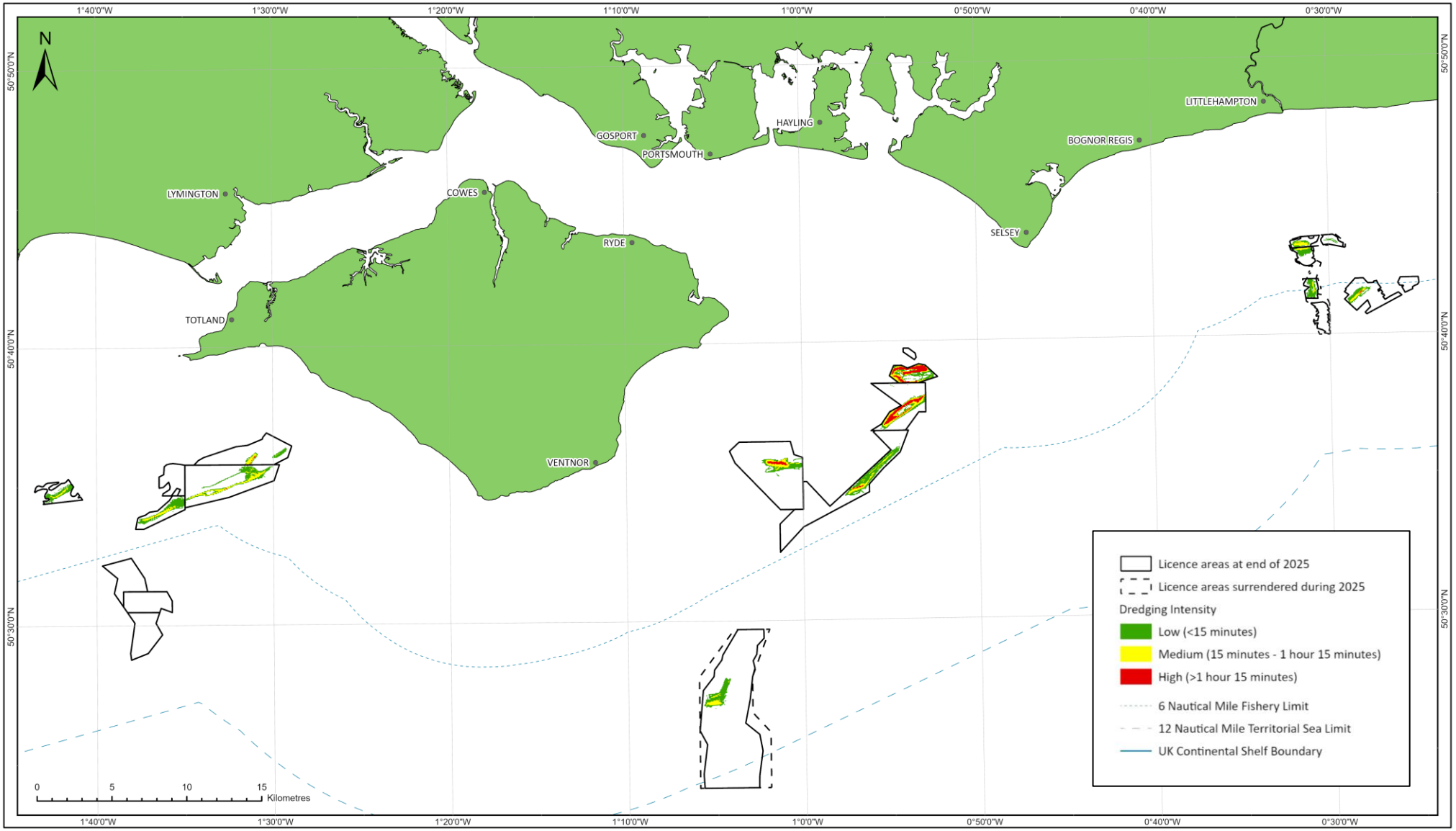
- The licensed area in the region was 123.1 km²
- The total area actually available to be dredged within the region (due to zoning) was 57.9 km²
- Dredging took place within 16.7 km² – 13.6 % of the licensed area
- The area dredged with high intensity (for more than 1 hour 15 minutes in the year) was 2.0 km²
- 90 % of regional dredging effort took place within 5.7 km²
- During 2025, the area licensed for marine aggregate extraction decreased by 11.1 km²

Area of seabed licensed and dredged 2021-2025



New area licensed versus existing area surrendered 2021-2025




1°40'0"W
1°30'0"W
1°20'0"W
1°10'0"W
1°0'0"W
0°50'0"W
0°40'0"W
0°30'0"W
50°50'0"N
50°40'0"N
50°30'0"N
N
LYMINGTON
COWES
GOSPORT
PORTSMOUTH
HAYLING
LITTLEHAMPTON
BOGNOR REGIS
SELSEY
RYDE
TOTLAND
VENTNOR
0
5
10
15
Kilometres
Licence areas at end of 2025
Licence areas surrendered during 2025
Dredging Intensity
Low (<15 minutes)
Medium (15 minutes - 1 hour 15 minutes)
High (>1 hour 15 minutes)
6 Nautical Mile Fishery Limit
12 Nautical Mile Territorial Sea Limit
UK Continental Shelf Boundary

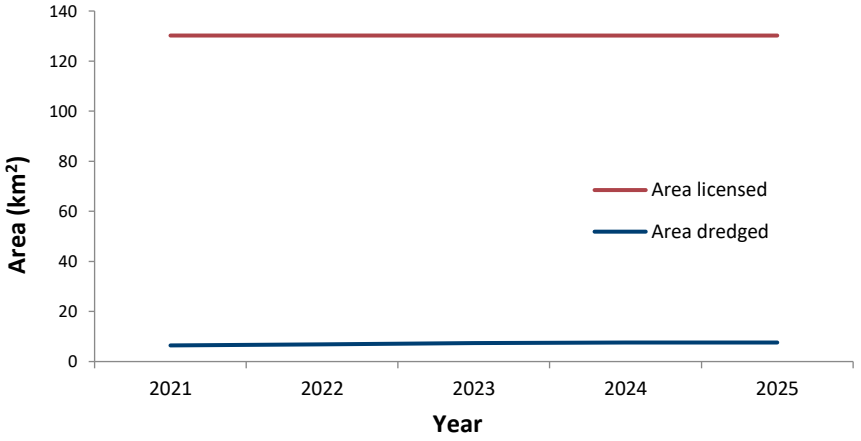
Background

- 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 2025, 1.33 million tonnes (mt) of construction aggregate were dredged from a permitted licensed tonnage of 2.80 mt. In addition, 0.05 mt were dredged for beach nourishment
- Of the total marine aggregate dredged for construction from the region:
  - 99.96 % was delivered to the South West (1.33 mt)
    - 52.0 % of this went to English wharves (0.69 mt)
    - 48.0 % of this went to Welsh wharves (0.64 mt)
  - 0.04 % was delivered to the South Coast (0.001 mt)

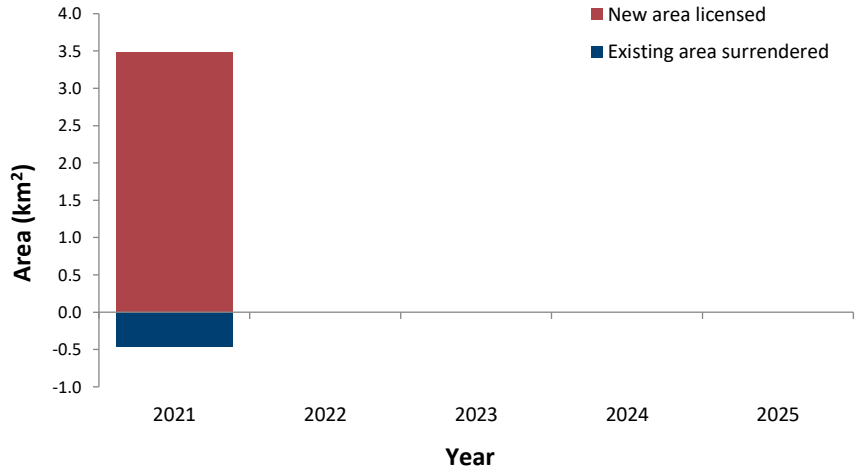
Regional statistics

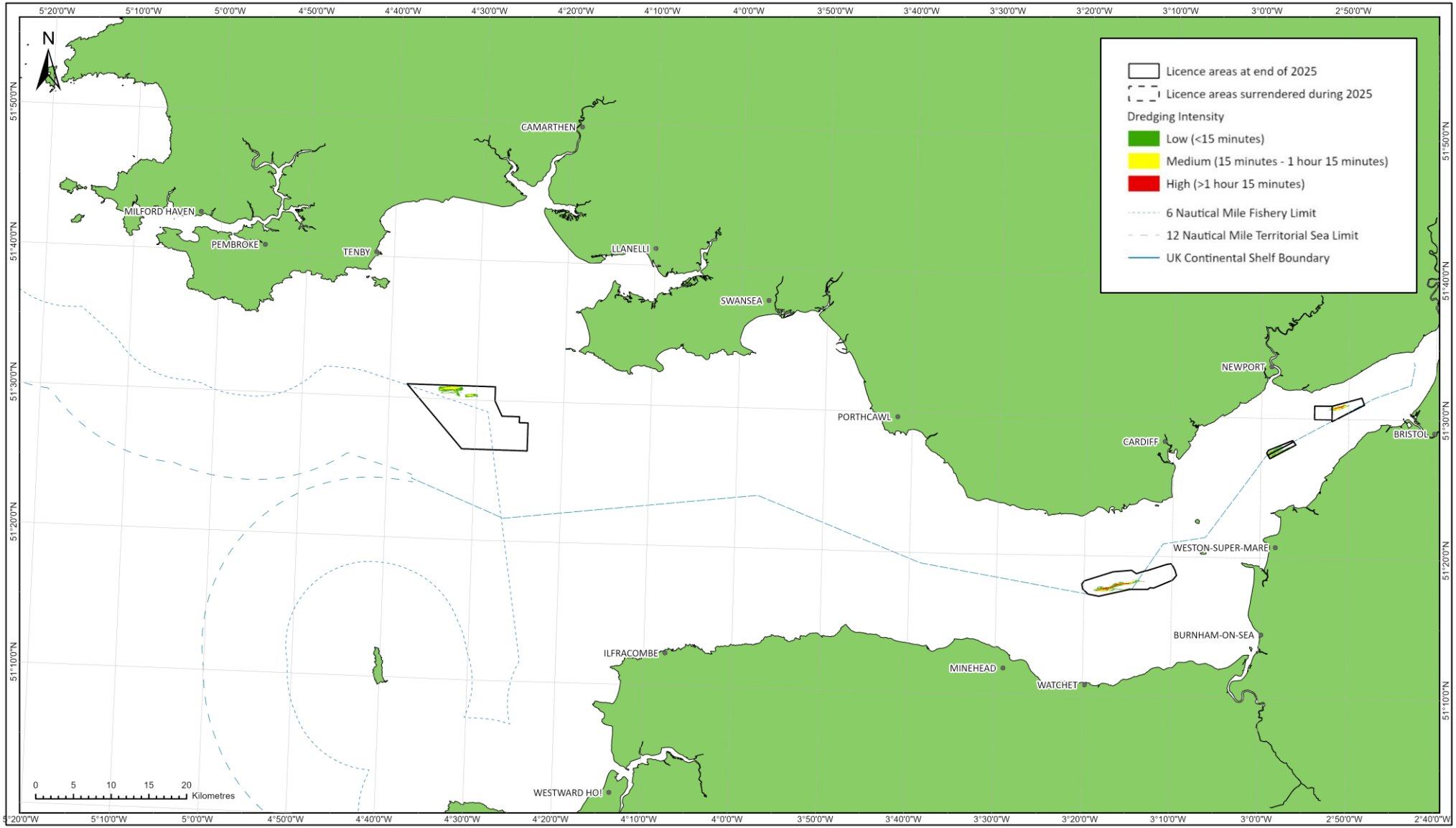
- The licensed area in the region was 130.2 km²
- The total area actually available to be dredged within the region (due to zoning) was 31.1 km²
- Dredging took place within 7.6 km² – 5.8 % of the licensed area
- The area dredged with high intensity (for more than 1 hour 15 minutes in the year) was 0.7 km²
- 90 % of regional dredging effort took place within 2.6 km²
- During 2025, the area licensed for marine aggregate extraction remained unchanged

Area of seabed licensed and dredged 2021-2025



New area licensed versus existing area surrendered 2021-2025

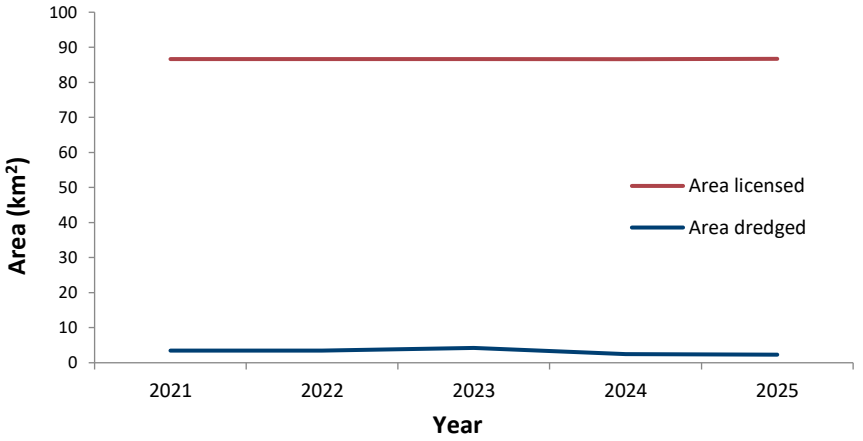



N
Licence areas at end of 2025
Licence areas surrendered during 2025
Dredging Intensity
Low (<15 minutes)
Medium (15 minutes - 1 hour 15 minutes)
High (>1 hour 15 minutes)
6 Nautical Mile Fishery Limit
12 Nautical Mile Territorial Sea Limit
UK Continental Shelf Boundary
CAMARTHEN
MILFORD HAVEN
PEMBROKE
TENBY
LLANELLI
SWANSEA
NEWPORT
PORTHCAWL
CARDIFF
BRISTOL
WESTON-SUPER-MARE
BURNHAM-ON-SEA
ILFRACOMBE
MINEHEAD
WATCHET
WESTWARD HO!
0 5 10 15 20
Kilometres
5°20'0"W
5°10'0"W
5°0'0"W
4°50'0"W
4°40'0"W
4°30'0"W
4°20'0"W
4°10'0"W
4°0'0"W
3°50'0"W
3°40'0"W
3°30'0"W
3°20'0"W
3°10'0"W
3°0'0"W
2°50'0"W
2°40'0"W
51°50'0"N
51°40'0"N
51°30'0"N
51°20'0"N
51°10'0"N

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 2025, 0.13 million tonnes (mt) of construction aggregate were dredged from a permitted licensed tonnage of 0.90 mt. In addition, 0.003 mt were dredged for beach nourishment
- Of the total marine aggregate dredged for construction from the region:
- 100 % of the tonnage dredged was delivered to the North West (0.13 mt)
  - 100 % of this went to English wharves (0.13 mt)

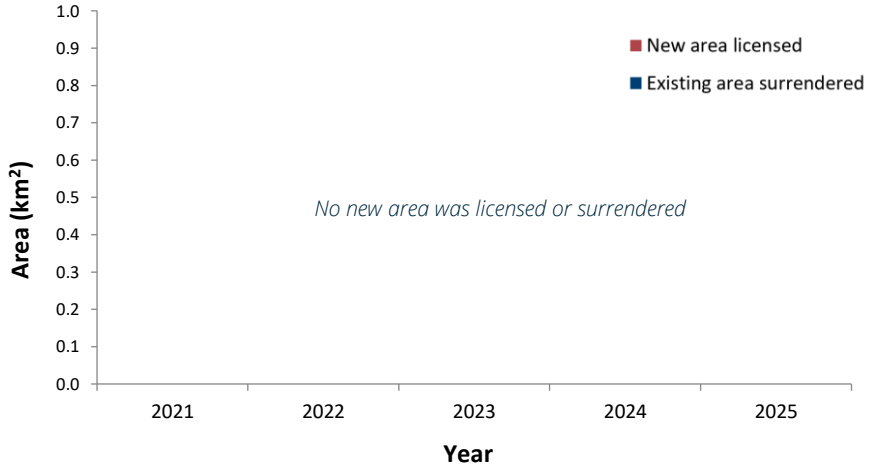
Area of seabed licensed and dredged 2021-2025

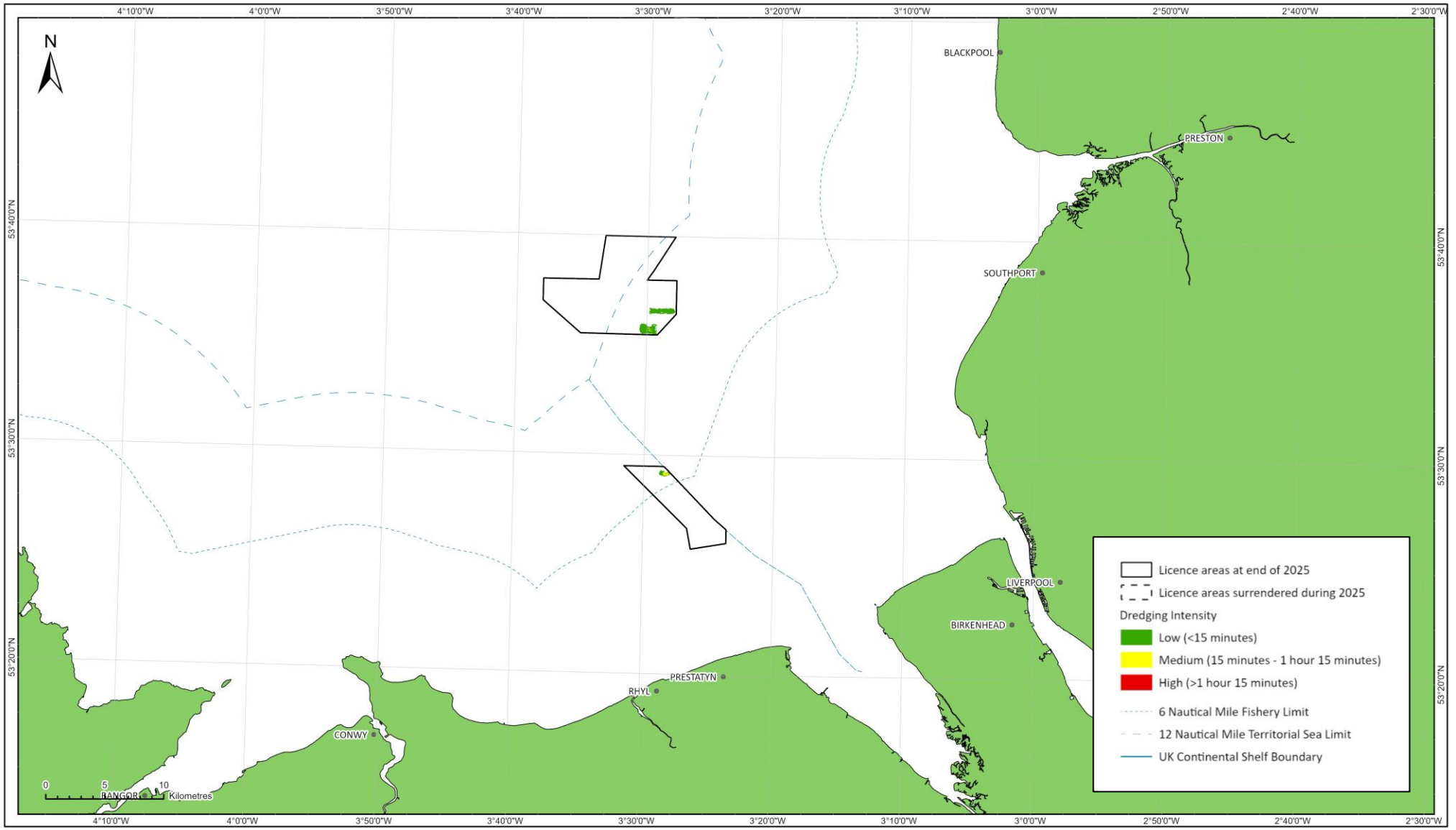


Regional statistics

- The licensed area in the region was 86.7 km²
- The total area actually available to be dredged within the region (due to zoning) was 18.6 km²
- Dredging took place within 2.3 km² – 2.7 % of the licensed area
- The area dredged with high intensity (for more than 1 hour 15 minutes in the year) was 0 km²
- 90 % of regional dredging effort took place within 1.4 km²
- During 2025, the area licensed for marine aggregate extraction remained unchanged

New area licensed versus existing area surrendered 2021-2025




4°10'0"W
4°0'0"W
3°50'0"W
3°40'0"W
3°30'0"W
3°20'0"W
3°10'0"W
3°0'0"W
2°50'0"W
2°40'0"W
2°30'0"W
53°40'0"N
53°30'0"N
53°20'0"N
N
BLACKPOOL
PRESTON
SOUTHPORT
LIVERPOOL
BIRKENHEAD
PRESTATYN
RHYL
CONWY
BANGOR
0
5
10
Kilometres
Licence areas at end of 2025
Licence areas surrendered during 2025
Dredging Intensity
Low (<15 minutes)
Medium (15 minutes - 1 hour 15 minutes)
High (>1 hour 15 minutes)
6 Nautical Mile Fishery Limit
12 Nautical Mile Territorial Sea Limit
UK Continental Shelf Boundary

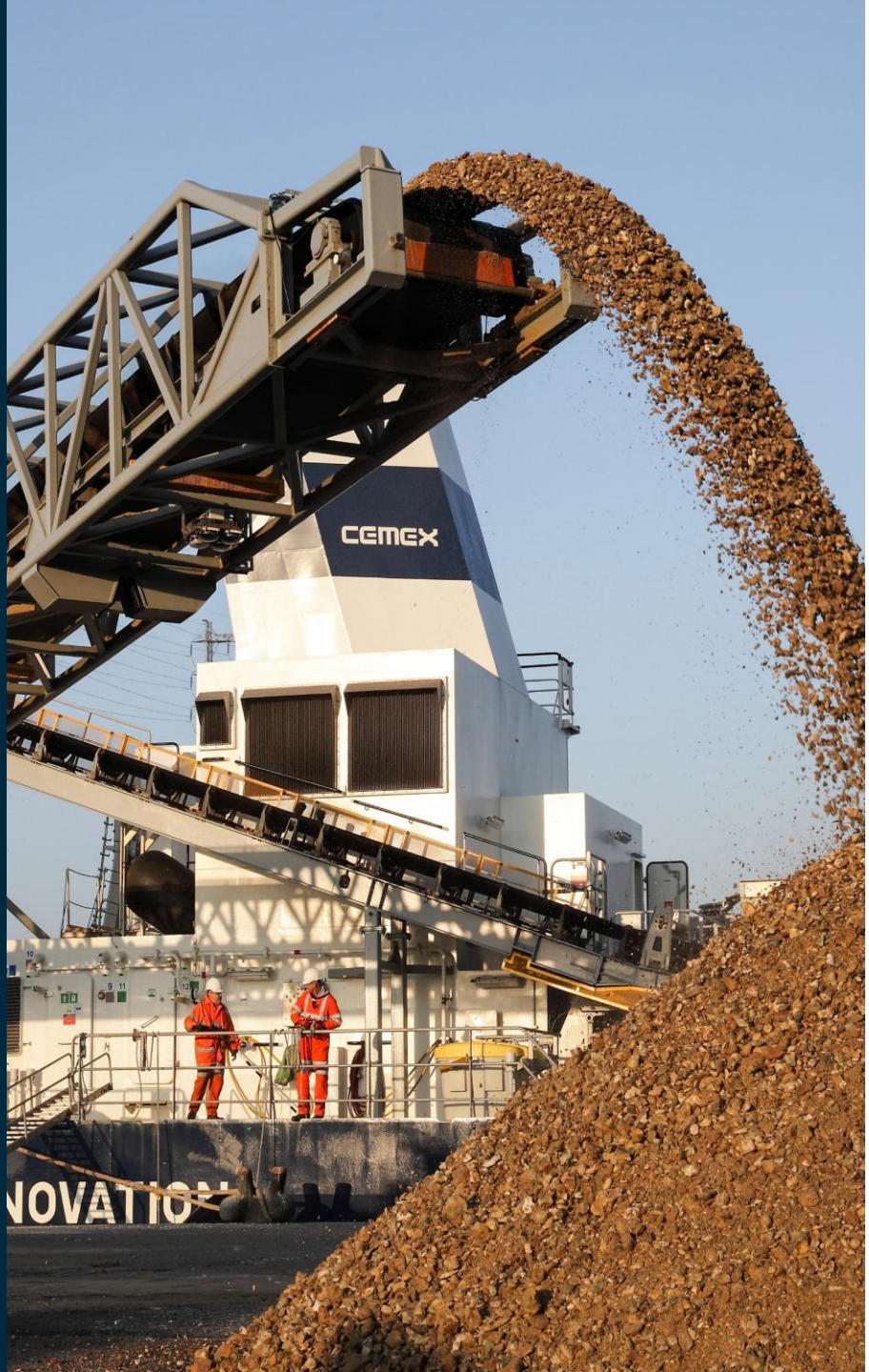
England and Wales have one of the largest and most efficient dredging industries in the world, extracting 15 to 20 million tonnes of sand and gravel from the seabed each year for a variety of uses. These range from housebuilding, to major infrastructure projects like the Thames Tideway Tunnel and Liverpool 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 £16.7bn 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 £5bn 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 31 vessels across 68 production licences around the UK as of August 2026.

BMAPA membership (as of August 2026) comprises: Britannia Aggregates, Breedon Group, Brett Group, CEMEX UK Marine, DEME Building Materials, Heidelberg Materials Marine, Holcim UK, Sea Aggregates, Tarmac Marine and Volker Dredging.



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