West Berkshire M&WLP EiP Day 1 – Response to the claim 80% of mortar is now factory produced

Item 3 (Matter 2) Construction Aggregates Requirement Issue 1a

During the discussion of this item Mr Cowley representing Mr and Mrs Mills stated that the supply of most mortar sand was from factory produced sources. Specifically that the Mineral Products Association (MPA) Mortar group website states that over 80% mortars used in the UK today comes from factory-produced sources as opposed to being mixed on site.

The MPA Mortar group members represent factory produced mortar suppliers in England, Scotland and Wales and lime producers that are used in the mortar factories. Factory supplies come from a network of dry silo mortar plants (DSM) and smaller older ready mixed mortar plants.

Grundon raised concerns over this data as their experience of the market was different.

Grundon contacted the MPA and its Mortar group asking questions to clarify the data and received answers from Aurelie Delannoy Director, Economic Affairs MPA and Mick Russell MPA Mortar Manager as detailed below.

Q. How the 80% was derived.

A. I can confirm the total GB mortar market estimates for 2021 showing 3,258,085 tonnes, with MPA mortar sales (from the survey) representing 79% (2,574,908 tonnes).

The GB market estimates are based on two sets of assumptions:

- *Blocks deliveries: 600 blocks per tonne of mortar*
- *Bricks deliveries: 1000 bricks per tonnes of mortar*

Bricks and blocks data are taken from BEIS.

	Estimated GB Mortar market	*MPA mortar sales*	*Share*
2018:	*3,223,453*	*2,766,322*	*86%*
2019:	*3,151,811*	*2,703,270*	*86%*
2020:	*2,564,480*	*2,069,236*	*81%*
2021:	*3,258,085*	*2,574,908*	*79%*

Q. Does the Mortar group represent all factories, I think it picks up all DSM and only missing a few mortar plants?

A. Not all producers, MPA Mortar believe there are two or three SME’s not members.

Q. What are the main sand sources, is dry screened pit sand used?

A. Yes mainly dry screened.

Q. When was the last new DSM plant built?

A. Last one I know that was commissioned as a re-build after a fire was, I think 2019, new build I would have to ask around, which I will do now.

Observations and deductions, based on the foregoing information

In relation to the first question the Aggregates Monitoring (AM) Survey 2019 for England and Wales details land-won sand and gravel end uses in Table A1. This details Sand for use in mortar (building sand) at 5.276 million tonnes.

The earlier 2014 survey details land-won sand and gravel end uses in Table A1. This details Sand for use in mortar (building sand) at 5.489 million tonnes.

The MPA Mortar figure estimates GB demand at 3.258 million tonnes in 2021 based on the estimated demand from brick and block sales. Of this, almost 2.6 mt (79%) was from MPA Mortar members.

However, Dr Thompson stated in response to one point that use by brick and blocks did not represent the whole market and that there was considerable use elsewhere. This can be compared using the MPA Mortar figures with those from the AM survey for 2019.

The comparison would suggest that MPA factory mortar sales of 2.7mt for GB represent around 50% of the market in England and Wales (based on AM2019). If sales in Scotland are excluded that proportion will be less – perhaps nearer to 45%.

Question 2 sought to clarify if the MPA Mortar group and therefore any of their figures excluded any major factory producers. Our understanding from the members list is that all DSM plants are included and that only a couple of smaller ready mixed mortar plants are not part of the group.

The experience of Grundon was that dry screened sand was used at the DSM plants and the third question therefore sought to understand the supply into all mortar factory plants. The MPA Mortar group confirmed that the major supply is from dry screened sand, not washed sand as stated by Mr Cowley.

Dr Thompson stated that factory supply was a well-established mature market rather than one that was continuing to grow. This ties into the understanding of Grundon. The MPA Mortar group have yet to answer the last question of when the last new plant was built. This would imply it was some years ago. This matches in with Grundon's view that it is a mature market and there are no recent plants being developed. The MPA Mortar figures also indicate that their proportion of supply is also reducing.

Conclusions

The understanding that more than 80% of mortar used is supplied from mortar factories is incorrect, as it only relates to an estimated use in bricks and blocks. The more likely proportion is 45%.

The supply of sand into factory produced mortars is mainly dry screen sand from sand pits rather than washed sand.

The factory produced mortar sand market is mature and as a supply option has shown recent signs of reducing as a proportion of the total.