

West Berkshire Minerals and Waste Local Plan Examination – Post Hearings Tasks

Note on comparison of the AM2014 and AM2019 Aggregate Minerals Surveys

1. Introduction

- 1.1 Surveys on the sales, movement, consumption and permitted reserves of aggregate minerals are undertaken by the British Geological Survey on behalf of the government roughly every four years.
- 1.2 The most recent survey is entitled ‘Collation of the Results of the 2019 Aggregate Minerals Survey for England and Wales’. This report was published on 5th August 2021 and is commonly abbreviated to ‘AM2019’.

2. Background

- 2.1 The most recent 2020 Local Aggregates Assessment (LAA) **[ME001]** used the most recently available AM Survey at the time of publishing, which was AM2014. However the LAA noted that once the more recent AM2019 was published, the findings of this survey should be taken into account.
- 2.2 There were delays to the publication of AM2019 and it was subsequently published on 05th August 2021, after the date of submission of the West Berkshire Minerals and Waste Local Plan (MWLP) for examination.
- 2.3 A comparison of the AM2014 survey (which the 2020 LAA is based on) with the AM2019 survey has been requested as part of the examination of the MWLP in order to ascertain any trends between the two documents in relation to sand and gravel.
- 2.4 It is noted in the LAA, and was reiterated at the examination hearings that the AM Surveys do not report on West Berkshire as a separate Mineral Planning Authority in relation to sales, imports, exports and consumption, and only reports this at a Berkshire-wide level. Nor does it report on soft sand or sharp sand separately, only combined sharp sand and gravel.
- 2.5 Therefore certain estimations and assumptions are used in the 2020 LAA in order to make broad conclusions at a West Berkshire level.

3. Comparison of AM2014 and AM2019

- 3.1 The following tables present a comparison of sand and gravel sales, imports, exports and consumption from the AM2014 and AM2019 surveys.

Sand and Gravel Import/Export (**all sources**) and Consumption Data for Berkshire 2014 & 2019

	Sales	Imports	Exports	Consumption
2014	1,051,000	505,000	803,000	753,000
2019	587,000	608,000	242,000	953,000

Sand and Gravel Import/Export (**land won**) and Consumption Data for Berkshire 2014 & 2019

	Sales	Imports	Exports	Consumption
2014	1,051,000	353,000	803,000	601,000
2019	587,000	395,000	242,000	741,000

Estimates of (land won) Sand and Gravel Consumption in West Berkshire 2014 & 2019.

Sand and Gravel Consumption	2014	2019
Berkshire Consumption – AM Survey Total	601,000	741,000
Estimated West Berkshire Consumption – Proportion of Berkshire Estimate ¹ (based on AM survey)	106,377	128,193

- 3.2 The above tables show that consumption in Berkshire of both land won and total sand and gravel has increased between 2014 and 2019, although sales have dropped. Estimated consumption in West Berkshire based on a proportion of population has also increased.
- 3.3 This lends weight to the conclusion in the LAA, that although sales have decreased in recent years due to declining reserves in permitted sites, demand (consumption) has not decreased, and has in fact increased. Increased consumption can be seen to have been sustained by an increase in imports.
- 3.4 Therefore, it is considered that the approach in the LAA to maintain the provision rate from 2018 is justified in order to fulfil the NPPF requirement in paragraph 210(b) to aim to source mineral supplies indigenously rather than relying on imports.
- 3.5 The following tables present a comparison of sand and gravel movements from the AM2014 and AM2019 surveys.

¹ West Berkshire Population 17.7% of total Berkshire population in 2014 and 17.3% of total Berkshire population in 2019.

Sources of Sand and Gravel (**all sources**) Consumed in Berkshire 2014 & 2019

Source MPA	2014		2019	
	Percentage	Tonnes	Percentage	Tonnes
Indigenous				
Berkshire				
West Berkshire	10-20%	75,300 – 150,600	1-10%	9,530 – 95,300
Windsor and Maidenhead	10-20%	75,300 – 150,600	20-30%	190,600 – 285,900
Imports to Berkshire				
South East				
Hampshire	10-20%	75,300 – 150,600	10-20%	95,300 - 190,600
Oxfordshire	10-20%	75,300 – 150,600	1-10%	9,530 – 95,300
Greater London – East	10-20%	75,300 – 150,600	-	-
Buckinghamshire	1-10%	7,530 – 75,300	10-20%	95,300 - 190,600
Medway	1-10%	7,530 – 75,300	1-10%	9,530 – 95,300
Kent	<1%	<7,530	<1%	<9,530
South Downs National Park	<1%	<7,530	<1%	<9,530
Surrey	<1%	<7,530	-	-
West Sussex	<1%	<7,530	-	-
Portsmouth	-	-	<1%	<9,530
Southampton	-	-	<1%	<9,530
Greater London – Barking & Dagenham	-	-	10-20%	95,300 - 190,600
Elsewhere				
Wiltshire	1-10%	7,530 – 75,300	1-10%	9,530 – 95,300
Cambridgeshire	1-10%	7,530 – 75,300	<1%	<9,530
Hertfordshire	1-10%	7,530 – 75,300	1-10%	9,530 – 95,300
Devon	<1%	<7,530	<1%	<9,530
Gloucestershire	<1%	<7,530	1-10%	9,530 – 95,300
Central Bedfordshire	<1%	<7,530	<1%	<9,530
Essex	<1%	<7,530	<1%	<9,530
Bristol	-	-	<1%	<9,530
Nottinghamshire	-	-	<1%	<9,530
Worcestershire	-	-	<1%	<9,530
Total Indigenous Consumption		248,000		345,000
Total Imports		505,000		608,000
Total Consumption		753,000		953,000

Sources of Sand and Gravel (**land won**) Consumed in Berkshire 2014 & 2019

Source MPA	2014		2019	
	Percentage	Tonnes	Percentage	Tonnes
Indigenous				
Berkshire				
West Berkshire	20-30%	120,200 – 180,300	1-10%	7,410 – 74,100
Windsor and Maidenhead	20-30%	120,200 – 180,300	30-40%	
Imports to Berkshire				
South East				
Hampshire	10-20%	60,100 – 120,200	10-20%	74,100 – 148,200
Oxfordshire	10-20%	60,100 – 120,200	1-10%	7,410 – 74,100
Surrey	1-10%	6,010 – 60,100	-	-
Buckinghamshire	1-10%	6,010 – 60,100	10-20%	74,100 – 148,200
Kent	<1%	<6,010	<1%	<7,410
South Downs National Park,	<1%	<6,010	<1%	<7,410
West Sussex	<1%	<6,010	-	-
Elsewhere				
Wiltshire	10-20%	60,100 – 120,200	1-10%	7,410 – 74,100
Gloucestershire	1-10%	6,010 – 60,100	1-10%	7,410 – 74,100
Cambridgeshire	1-10%	6,010 – 60,100	<1%	<7,410
Hertfordshire	1-10%	6,010 – 60,100	1-10%	7,410 – 74,100
Devon	<1%	<6,010	<1%	<7,410
Central Bedfordshire	<1%	<6,010	<1%	<7,410
Essex	<1%	<6,010	<1%	<7,410
Nottinghamshire	-	-	<1%	<7,410
Worcestershire	-	-	<1%	<7,410
Total Indigenous Consumption		248,000		346,000
Total Imports		353,000		395,000
Total Consumption		601,000		741,000

- 3.6 The above tables demonstrate that in AM2019 Berkshire remains the dominant source of sand and gravel consumed in Berkshire (indigenous consumption), followed by surrounding Mineral Planning Authorities.
- 3.7 The previous limitations of the survey have already been identified, in that movements of soft and sharp sand are not separately identified. However, West Berkshire undertook its own study on soft sand in 2019 [ME003], the same year as the AM2019 survey. This identified that movements of soft sand

between Oxfordshire and West Berkshire were occurring in that year, although the volumes could not be identified for confidentiality reasons. Therefore it is considered that the MWLP has relied upon more detailed information than that presented in AM2019, and is therefore sound in its conclusions relating to soft sand provision.