Central & Eastern Berkshire Authorities

Joint Minerals & Waste Plan

Local Aggregate Assessment 2024

December 2025

Bracknell Forest Council

Reading Borough Council
Working better with you

www.rbwm.gov.uk
Royal Borough of Windsor & Maidenhead

WOKINGHAM BOROUGH COUNCIL

Prepared by Hampshire Planning and Transport

Hampshire County Council

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		10-year	**3-year**	**10-year**	**3-year**		**10-year**	**3-year**					
Soft (building) sand (SS)													There are no active soft sand sites in the plan area.
Sharp sand and gravel (SSG)	424	531	474	↓	↓	4814	↓	↓	530	9.1		1190	
Sand and gravel (S&G)[9]	424	531	474	↓	↓	4814	↓	↓	530	9.1		1190	10-year average sales most appropriate when compared to forecasted figures (based on a range of forecasts from MPA, Construction Products and Bank of England)
Crushed rock (CR)													
Marine dredged aggregates (MDA)													
MDA landings													
Imported S&G @ wharves													
Imported CR @ wharves													
Imported S&G @rail depots													

Local Aggregate Assessment (LAA) 2024[2] Dashboard													
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		10-year	**3-year**	**10-year**	**3-year**		**10-year**	**3-year**					
Imported CR @ rail depots													
Secondary aggregate													There have been no sales of secondary aggregate over the past 10 years in the plan area
Recycled aggregate	64	101	69	↓	↓				70			275	10-year average sales most appropriate when compared to forecasted figures (based on a range of forecasts from MPA, Construction Products and Bank of England)

Foot notes:

1: All units expressed in 'thousand tonnes' unless otherwise specified

2: The LAA date is that for the current AM data collection year and the corresponding Annual Report.

3: Average annual sales should include current year's sales

4: The trends should be derived from the Excel 'trend line' for the relevant time series data - see AM collation tables

5: APR - Aggregate Provision Rate also known as LAA Rate - based on mpa's judgement/default 10-year average sales and justified in the Commentary **NB APRs should be also applied to aggregates handled by the wharves, rail depots and S/RA sites - custom has been to use 10-year average sales, unless compelling evidence to use an alternative.**

6: Allocations as estimated total tonnage in adopted mineral plan and not yet permitted

7: Capacity as estimated by mpa through current AM survey or alternative database and estimated for total aggregate for wharves/rails depots - see definition in AM survey form

8: Reserved for technical clarifications, remarks and judgements in Commentary

9: S&G is the combination of SS and SSG

Executive Summary

Introduction

This is the Local Aggregate Assessment (LAA) for Central and Eastern Berkshire and covers the administrative areas of the plan-making partners (Bracknell Forest Council, Reading Borough Council, the Royal Borough of Windsor & Maidenhead and Wokingham Borough Council). The purpose of the LAA is to detail the current and predicted situation in Central and Eastern Berkshire with respect to all aspects of aggregate supply.

Land-won Aggregate

Sand and Gravel

In terms of aggregates, Central and Eastern Berkshire's geology provides both sharp sand and gravel and soft sand. Aggregates used within Central and Eastern Berkshire are sourced from land-won resources, recycled aggregate and imports by road via nearby rail depots.

Within Central and Eastern Berkshire, there were five active quarries in 2024.

Soft sand resources in the area are generally poor quality and are no longer principally extracted within Central and Eastern Berkshire. This places a reliance on imports to address the lack of local supply.

Sales of sand and gravel decreased by 63,000 tonnes in 2024. The overall trajectory of 10-year sales is decreasing, and the pattern of sales is broadly similar to the South East.

Crushed Rock

Central and Eastern Berkshire is dependent on imports of crushed rock predominately from Somerset.

There is currently no evidence that suggests a need to increase capacity at rail depots for imports.

Marine Sand & Gravel

Marine-won sand and gravel is a small but growing proportion of the total aggregate consumed in Berkshire. Marine imports are predominately from London Wharves and Hampshire.

Recycled & Secondary Aggregate

Sales of recycled aggregate in Central and Eastern Berkshire decreased in 2024. Capacity survey information was limited but indicates that recycled aggregate sites capacity has fallen.

Future Aggregate Supply

There are a number of major infrastructure projects as well as a significant uplift in local housing delivery targets which indicate an increase in infrastructure delivery expected to result in an increase in aggregate demand.

Reserves of sand and gravel in Central & Eastern Berkshire with planning permission for extraction (permitted reserves) as of 31st December 2024 were 4,814,000 tonnes (discounting Star Works as this is inactive).

The total landbank for all land-won aggregate based on 10-year average is 9.1 years. Based on three-year average sales, the landbank is 10.2 years, although the landbank is not necessarily an accurate reflection of supply. The 2024 Annual Provision Rate (APR) has been reduced from 0.58 million tonnes (Mt) to 0.53Mt.

The Central & Eastern Berkshire Authorities adopted the Joint Minerals & Waste Plan in 2023 which provides a framework for minerals and waste developments up to 2036.

The Plan includes allocations for sharp sand and gravel, an aggregate wharf and a recycled aggregate site. However, the proposals do not meet the required demands for Central and Eastern Berkshire and therefore, the sites are supported by criteria-based policies and an 'Area of Search' for sand and gravel.

It is estimated that the demand for soft sand over the Plan period will be in the region of 1.0Mt (65,000 tonnes per year). Sources will therefore need to be secured from elsewhere.

Conclusions

Central and Eastern Berkshire's current local aggregate provision will impact on the wider South East region as a whole if new development is not enabled to meet the forecasted demand up to 2036. Central and Eastern Berkshire is reliant on supplies from other mineral planning authority areas and as such this will need to be given consideration in other relevant Mineral Local Plans through the duty to cooperate and strategic cross-boundary liaison.

1. Introduction

1.1 The purpose of this Local Aggregate Assessment (LAA) is to detail the current and predicted situation in Central and Eastern Berkshire with respect to all aspects of aggregate supply.

1.2 The National Planning Policy Framework (NPPF)[1] (2024) sets out the requirement for local authorities to produce an annual LAA, stating that '*Minerals planning authorities should plan for a steady and adequate supply of aggregates by preparing an annual Local Aggregate Assessment, either individually or jointly, to forecast future demand, based on a rolling average of 10 years' sales data and other relevant local information, and an assessment of all supply options (including marine dredged, secondary and recycled sources)'.*

1.3 Bracknell Forest Council, Reading Borough Council, the Royal Borough of Windsor and Maidenhead and Wokingham Borough Council (collectively referred to as the 'Central & Eastern Berkshire Authorities') have worked in partnership to produce the Central and Eastern Berkshire - Joint Minerals & Waste Plan. The Plan sets out what provision of minerals is required, where these may be located; when they are to be provided and how they will be delivered during the Plan period to 2036.

1.4 This is the Local Aggregate Assessment (LAA) for Central and Eastern Berkshire and covers the administrative areas of the plan making partners. The purpose of the LAA is to detail the current and predicted situation in Central and Eastern Berkshire with respect to all aspects of aggregate supply, in particular with regard to land-won aggregate provision up to 2036.

1.5 It is important to note that the data used in the preparation of this LAA predominantly comes from the annual monitoring of aggregates sales by the Central & Eastern Berkshire Authorities on behalf of the South East England Aggregate Working Party (SEEAWP). The Aggregate Monitoring (AM) survey is used to collect annual sales data from active mineral extraction sites, aggregate wharves, aggregate rail depots and recycled aggregate processing sites.

[1] National Planning Policy Framework, paragraph 226(a) - https://assets.publishing.service.gov.uk/media/67aafe8f3b41f783cca46251/NPPF_December_2024.pdf

2. Land Won Aggregate

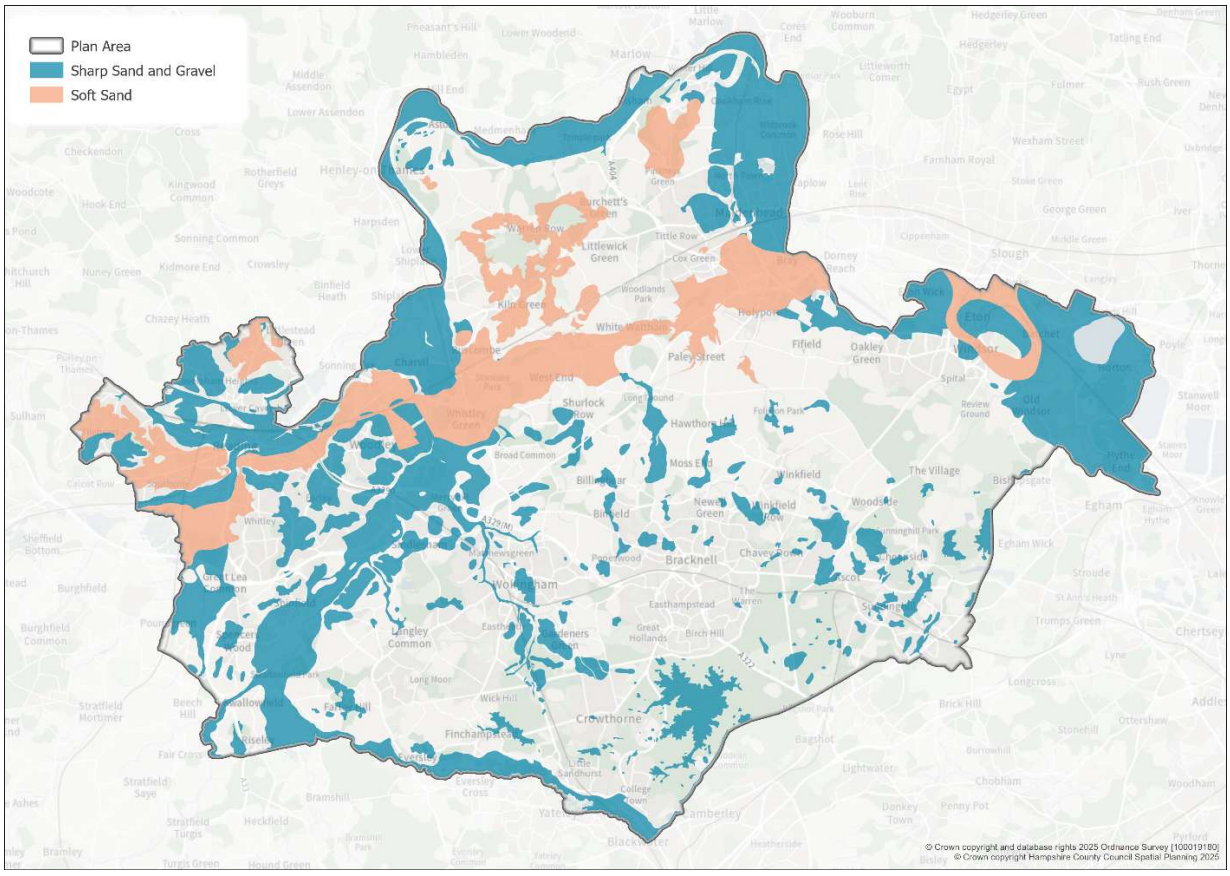
Geology of Central and Eastern Berkshire

2.1 The geology of Central and Eastern Berkshire is underlain by three main types of minerals: sand and gravel, chalk and clay. There are no deposits of crushed rock.

2.2 In terms of aggregates, Central and Eastern Berkshire's geology (see Figure 1) provides the following:

- Sharp sand and gravel; and
- Soft sand.

Figure 1: Sand and gravel resources in Central and Eastern Berkshire.



2.3 Central and Eastern Berkshire has the capability of supplying aggregates from a number of sources including:

- land-won extraction;
- recycled and secondary aggregate; and
- imported aggregate (via rail depots)[2].

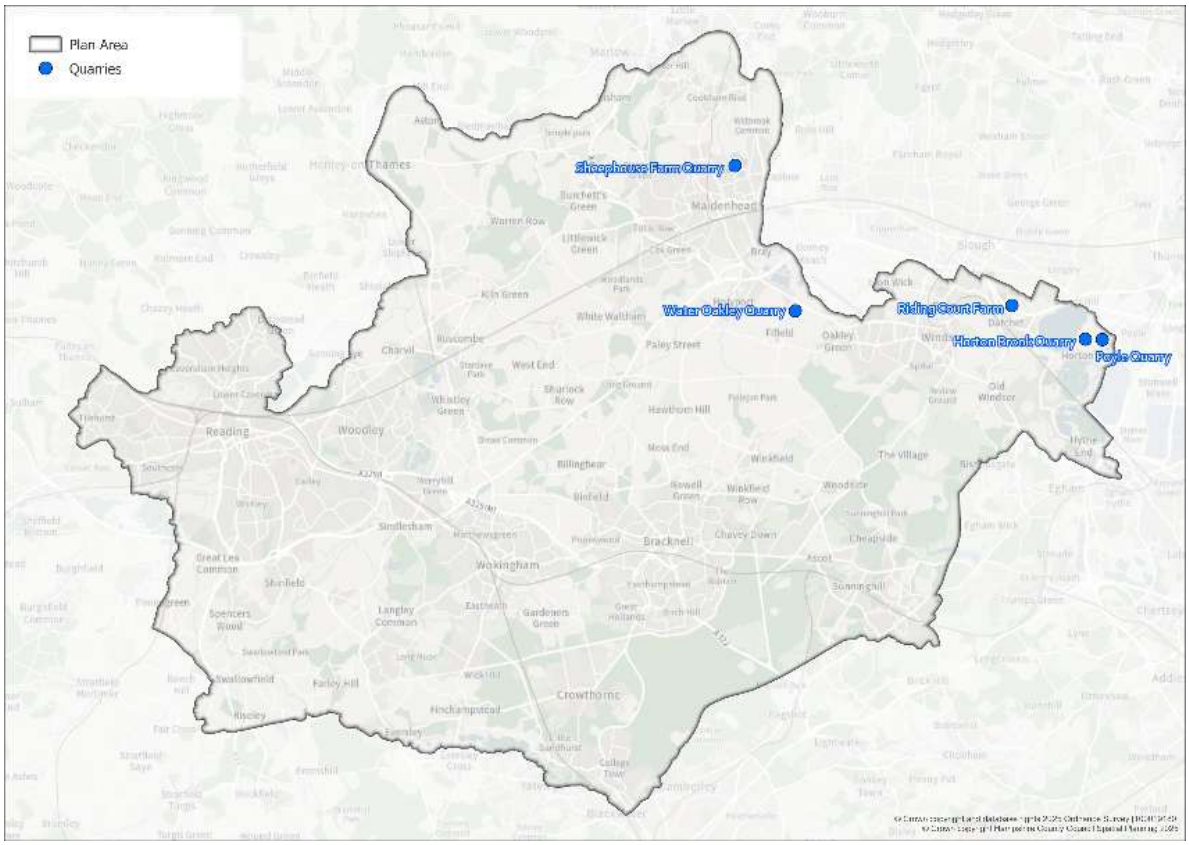
[2] Estimate of imports by road can be found in the AM 2023 National Collation.

2.4 Further information regarding the detailed geology can be found in the *Minerals: Background Study (2020)*[3] which was produced in support of the Joint Minerals and Waste Plan.

Permitted Sites Producing Sand and Gravel in Central and Eastern Berkshire

2.5 Figure 2 shows the location of the active quarries in Central and Eastern Berkshire in 2024 which were predominately located in the north and east within the Royal Borough of Windsor and Maidenhead. The last quarry in the south of the area closed in 2017, meaning that the supply of sand and gravel is currently produced entirely in the north east of the Plan area.

Figure 2: Location of active quarries in Central and Eastern Berkshire, 2024



2.6 Eversley Quarry and Kingsmead Quarry closed in 2017. Star Works at Knowl Hill, has permitted reserves but is an inactive site.

2.7 Extraction sites have not been operational within the neighbouring administrative area of Slough Borough Council for over 10 years.

[3] Minerals Background Study (2020): https://documents.hants.gov.uk/environment/Regulation19-ProposedSubmissionConsultation-JCEBMineralsBackgroundStudy-ProposedSubmission.pdf

2.8 Soft sand resources in the area are generally poor quality with pockets of material of economic interest in a small number of areas. This is highlighted in Table 1 by the identification of only two quarries that have been producers of soft sand; Star Works in the North which retains permitted reserves and Kingsmead Quarry which had some incidental extraction in the West. However, with the closure of Kingsmead Quarry and Star Works being inactive, there are no sites currently producing soft sand. This places a reliance on imports to address the lack of local supply. A Soft Sand Study[4] produced to support the Joint Plan highlights that soft sand is supplied by various mineral planning authority areas in the wider Thames Valley area.

2.9 In contrast, sharp sand and gravel is more widely distributed throughout Central and Eastern Berkshire.

2.10 Table 1 provides details of the aggregate extracted at each permitted site.

Table 1: Permitted quarries in Central and Eastern Berkshire, 2024

Site	Operator	Aggregate	Status in 2024
Horton Brook Quarry	Aggregate Industries / Jayflex Aggregates Ltd	Sharp Sand & Gravel	Active
Poyle Quarry	Summerleaze Ltd	Sharp Sand & Gravel	Active
Riding Court Farm	CEMEX	Sharp Sand & Gravel	Active
Sheephouse Farm	Summerleaze Ltd	Sharp Sand & Gravel	Active
Water Oakley	Summerleaze Ltd	Sharp Sand & Gravel	Active
Star Works*	Grundon Waste Management & Recycling	-	Inactive

*Star works retains permitted reserves but is no longer operating as a quarry.

2.11 Sheephouse Farm, Horton Brook, Poyle and Star Works are located within the Green Belt.

Sand and Gravel Production and Sales

2.12 The sales of land-won sand and gravel in Central and Eastern Berkshire are shown in Table 2. Sales have fluctuated over the 10-year period, with sales

[4] Soft Sand Study (2020), formed part of Reg 19 Consultation in Examination library: https://www.hants.gov.uk/berksconsult

increasing between 2018 and 2021.The more recent trend has been declining sales for the past four years with sales decreasing by 69,000 tonnes in 2024.

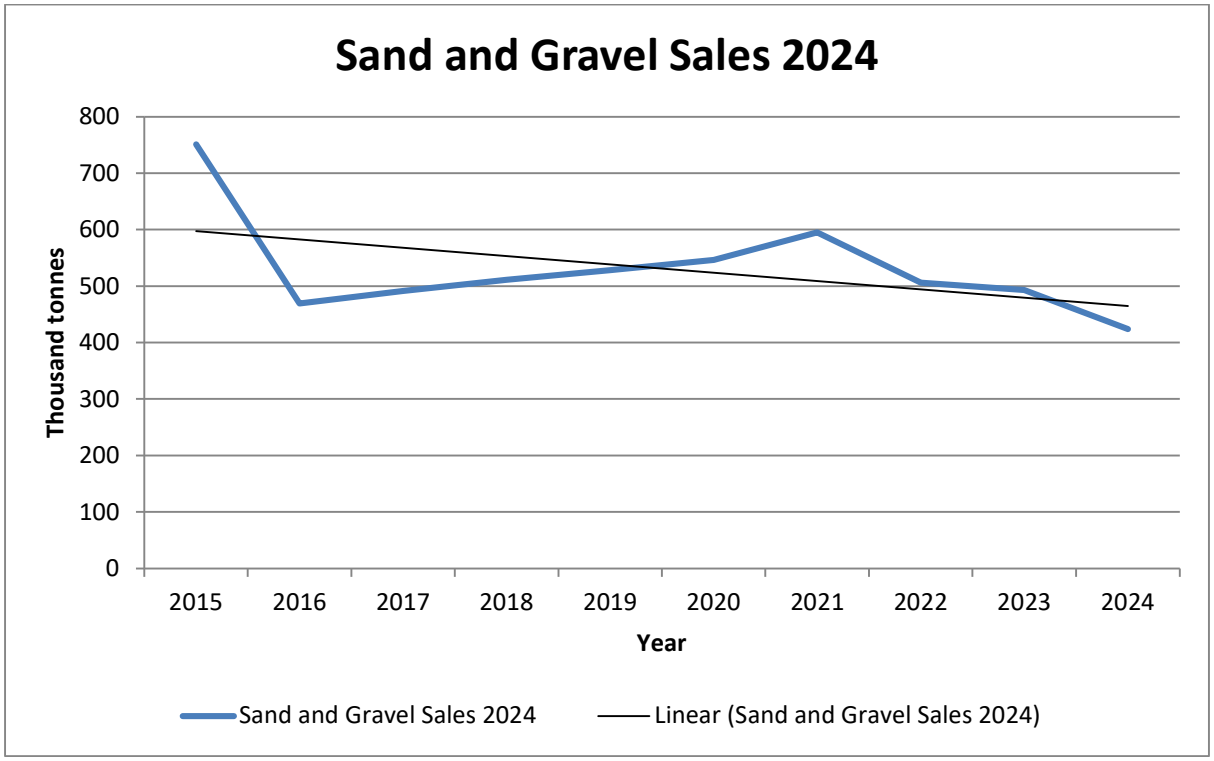
2.13 Figure 3 shows the sales trends over the 10 years The overall trajectory is a downward trend in sales. However, the fluctuations can be seen more clearly on the graph. Sales in 2024 are the lowest over the 10-year period.

Table 2: Land-won sand and gravel sales in Central and Eastern Berkshire, 2015-2024 (Thousand tonnes, Tt)

Year	2015	2016	2017	2018	2019	2020	2021	2022	2023	2024	Last 3 yr average	Last 10 yr average
Total Sales	751	469	491	511	528	546	595	506	493	424	474	531

Footnotes
Soft sand (SS) sales are contained with the total soft sand/sharp sand and gravel figure. SS sales are so small they cannot be individually revealed
Source: Aggregate Monitoring Surveys, 2015-2024

Figure 3: Sales of land-won Sand and Gravel in Central and Eastern Berkshire.

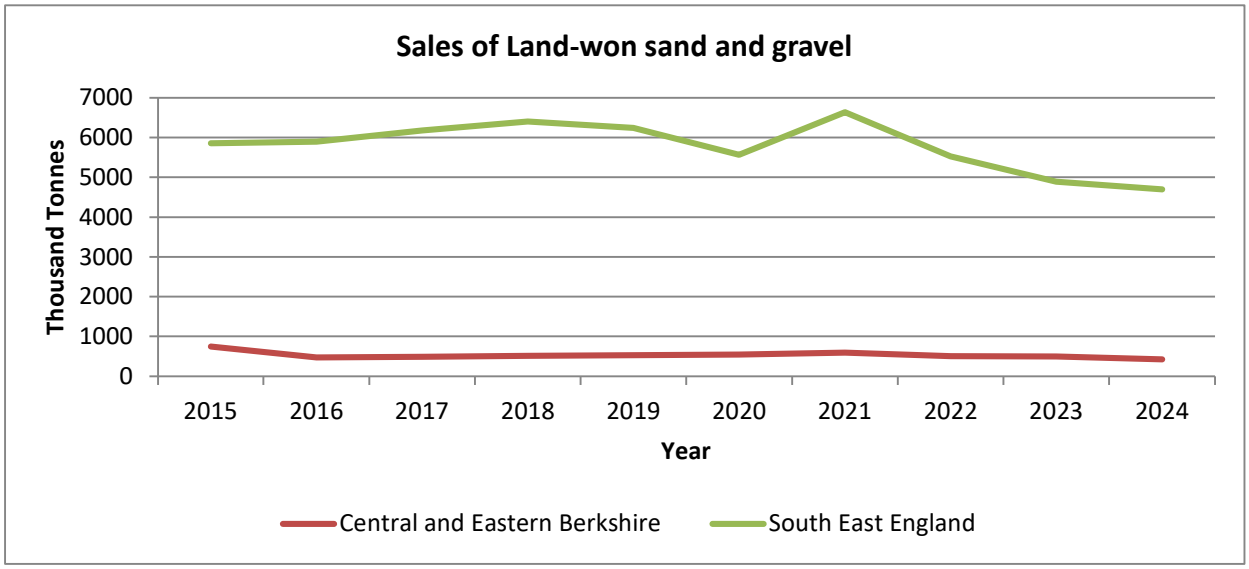


Source: Aggregate Monitoring Surveys, 2015-2024

2.14 When compared to the sales for South-East England (see Figure 4), the trends in Central and Eastern Berkshire appear to be broadly similar. South-East

figures[5] for sand and gravel sales decreased in 2020 but rebounded in 2021. Sales in Central and Eastern Berkshire followed this trend, but not to the same extent as can be seen when plotted below. Sales in Central and Eastern Berkshire have continued to decrease from 2021. However, the decrease is less dramatic than has been seen over the whole of the South-East region as a whole.

Figure 4: Sales of land-won sand and gravel in South-East England and Central and Eastern Berkshire



Source: South-East England Aggregates Monitoring Report 2024

2.15 Mineral planning authority boundaries do not influence the flow of minerals. The market dictates that sand and gravel will be obtained from the cheapest location for that material. Where the demand in Central and Eastern Berkshire can be satisfied most efficiently and cost effectively from locations in other areas, then it will.

2.16 Table 3 shows the consumption of aggregate both imported from external areas and supplied from sources within Berkshire.

[5] South- East England Aggregates Working Party Annual Report 2024 (January 2026) - https://documents.hants.gov.uk/see-awp/SEEAWP-annual-report-2024.pdf

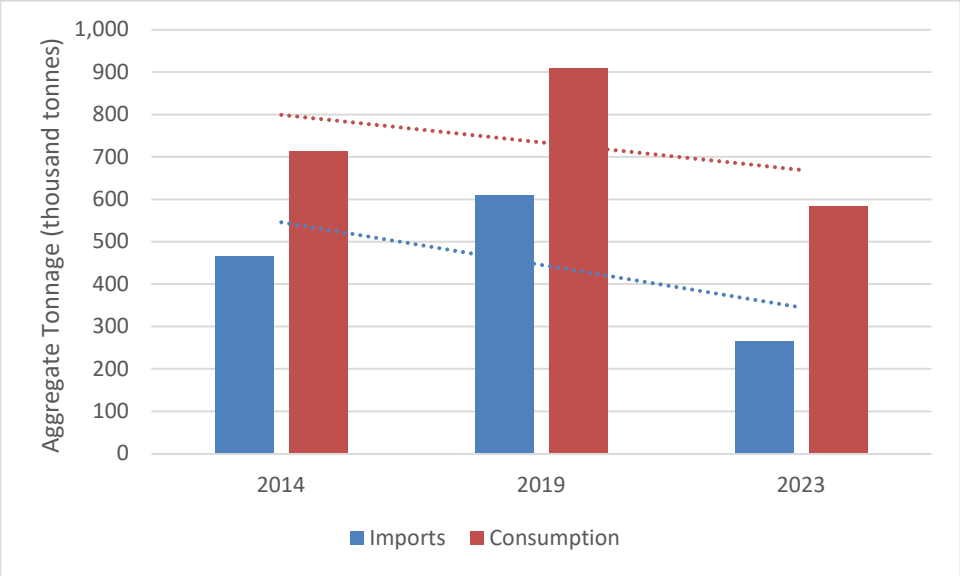
Table 3: Total consumption of Primary Aggregate in Berkshire, 2014, 2019 and 2023 (Thousand tonnes, Tt)

Berkshire	Land Won Sand and Gravel			Total sand and gravel			Crushed Rock			Total Primary Aggregates		
	2014	2019	2023	2014	2019	2023	2014	2019	2023	2014	2019	2023
Imports	313	395	88	465	608	264	1,094	835	951	1,559	1,420	1,215
Consumption	561	692	406	713	908	583	1,094	835	951	1,807	1,740	1,534
Consumption %	31%	40%	26%	39%	52%	38%	61%	48%	62%	100%	100%	100%
Imports/ Consumption %	56%	57%	22%	65%	67%	45%	100%	100%	100%	86%	82%	79%

Source: Collation of the results of the 2014, 2019 and 2023 Aggregate Minerals survey for England & Wales (Ministry for Housing, Communities and Local Government).
*Consumption is determined by total sold internally plus total imported.

2.17 AM2023 separated out Central & Eastern Berkshire from Berkshire (previously included West Berkshire) for the first time. To make the datasets more comparable, the proportion of Berkshire, made up by Central and Eastern Berkshire, has been applied to 2014 and 2019 data. The AM2023 data shows consumption and imports are down in Berkshire. Figure 5 shows the continuation of this decreasing trend when compared to 2019 and 2014 data.

Figure 5: Total Sand and Gravel Imports and Consumption



2.18 Berkshire is producing 493 thousand tonnes (Tt) of primary aggregates with sales split by 319 Tt sold internally within Berkshire. A further 61 Tt was sold in the South East region and 113 Tt sold to locations elsewhere.

2.19 There is no marine-won sand and gravel produced within Berkshire as it is land locked nor is there any crushed rock due to geological constraints.

2.20 The figures are showing that consumption for land won sand, and gravel has dropped by 45% but imports have dropped by 82%, so there does not appear to be a correlation. It could be argued that if consumption has dropped it would be likely that imports would also decrease. The data in Table 3 shows that Berkshire's land-won sand and gravel imports are only 22% of consumption, this suggest that Berkshire is relying more on its own land-won reserves than on imports.

3. Crushed Rock

3.1 Central and Eastern Berkshire does not have any natural hard rock resources and therefore relies on imports of crushed rock such as limestone and granite to meet demand for this type of aggregate.

3.2 Information from the BGS shows that Somerset is the dominant source of crushed rock for Berkshire. As of the most recent LAA which contained data up to 2022, Somerset had some 323.5 million tonnes of approved reserves of crushed rock (equivalent to 24.1 years landbank at the most recent sub regional apportionment rate)[6]. While not all the quarries in Somerset whose reserves are included in the landbank have rail connections, those that do, form a significant proportion of the total.

3.3 The importation and consumption of crushed rock within Berkshire is captured within the aggregate monitoring data. Data is only available for the wider Berkshire area which shows that all the crushed rock that is imported into Berkshire is then consumed within Berkshire (see Table 3). Therefore, there is no reported evidence of further flows of crushed rock from Berkshire to other areas.

3.4 There are currently no operational rail depots to receive crushed rock within Central and Eastern Berkshire. As such, it is assumed that the area is served predominately by the rail depots in the wider Berkshire area, most notably at Theale in West Berkshire District and Colnbrook in Slough. All crushed rock is then transported by road to the Plan area.

3.5 Whilst capacity does exist at these rail depots, Central and Eastern Berkshire is fully reliant on the continued operation of these depots and any threat to this provision would have a significant impact.

3.6 The crushed rock sales (from rail imports) in Berkshire and Hampshire recorded over the last 10 years are detailed in Table 4.

[6] Somerset Local Aggregate Assessment (Eighth Edition): 2021_SEAWP_Report__Dec_2022_.pdf (publishing.service.gov.uk)

Table 4: Crushed rock sales from rail depots and wharves in Berkshire (Berks) and Hampshire (Hants), 2015-2024 (Thousand tonnes, Tt)

Year	2015	2016	2017	2018	2019	2020	2021	2022	2023	2024	10 yr average	3 yr average
Berks & Hants	1565	1517	1733	2042	1768	1935	1942	1412	1594	1522	1703	1509

Source: AM Surveys

3.7 Sales of crushed rock were increasing, peaking in 2018. There was a sharp decrease in sales in 2019. Sales were recovering over two years from 2020 to 2021. Although sales decreased by 27% between 2021 and 2022, they have shown signs of recovery in 2023 and remained at a similar level in 2024.

3.8 While not all the quarries in Somerset have rail connections, two have railheads which can export significant quantities of aggregate. In 2023, Somerset Council raised the issue of permission end dates for two of the rail-linked quarries in Somerset. It should be noted that during the Plan period, the permission of one crushed rock site in Somerset with rail access will expire; Whatley Quarry, which has a permission end date of 31 December 2030. An application for Whatley Quarry to extend the time frame of the quarry was permitted in June 2024[7].

3.9 In 2022, Somerset Council confirmed that that they have sufficient reserves to meet current needs and did not foresee any likely issues that would affect the future supply of crushed rock to Central and Eastern Berkshire. Should future demand increase, the issue lies with the capacity of the rail depots to manage a higher level of imports, rather than with future supply.

3.10 The supply of crushed rock from Somerset has been the subject of discussion at the South East England Aggregate Working Party[8] and will continue to be a matter of regional and national significance for future minerals supply until questions of supply are resolved.

[7] Whatley Quarry Application Reference: Decision - SCC/3838/2021/ROMP, SCC/3836/2021/IDO, SCC/3795/2021 Westdown Quarry, Whatley, Frome, Somerset. - Modern Council

[8]South East England Aggregate Working Party - Minutes: https://documents.hants.gov.uk/see-awp/SEEAWPMinutes-020523.pdf

4. Marine-won sand and gravel

4.1 Central and Eastern Berkshire has no wharves for the landing of marine-won sand and gravel. However, the Aggregate Monitoring (AM) National Collation data (see Table 5) highlights that Berkshire's level of imported marine-won sand and gravel represented 6.1% of the total primary aggregate consumed in 2014[9] and this rose to approximately 11.6% in 2019[10].

Table 5: Marine aggregate imports into Berkshire 2014 - 2019

	Marine Sand and Gravel Imports	
	2014	2019
Tonnage (thousand tonnes)	152	213
% of Total Primary Aggregate Consumption	6.1%	11.6%

4.2 In 2023[11], for the first time, the AM National Collation separated out Central and Eastern Berkshire data from Berkshire as a whole (previously Central and Eastern Berkshire and West Berkshire), making the imports data fully attributable to the Plan area. Shown in Table 6, the level of imported marine-won sand and gravel represented 11.5% of the total primary aggregates consumed in the Central and Eastern Berkshire Plan area.

Table 6: Marine aggregate imports into CEB 2023

	Marine Sand and Gravel Imports
	2023
Tonnage (thousand tonnes)	177
% of Total Primary Aggregate Consumption	11.5%

[9] Collation of the results of the 2014 Aggregate Minerals Survey for England and Wales - https://assets.publishing.service.gov.uk/media/5a8000abe5274a2e87db7440/Aggregate_Minerals_Survey_England___Wales_2014.pdf

[10] Collation of the results of the 2019 Aggregate Minerals Survey for England and Wales https://assets.publishing.service.gov.uk/media/627e67e6d3bf7f053b9b627f/AM2019_National_Collation-Final.pdf

[11] Collation of the results of the 2023 Aggregate Minerals Survey for England and Wales - https://assets.publishing.service.gov.uk/media/68c270797596dbfa052bfe48/Aggregate_Minerals_Survey_2023.pdf

4.3 Due to it not being possible to determine exactly what level of marine aggregate imports reached Central and Eastern Berkshire in 2014 and 2019, these two datasets (Table 5 and 6) are not directly comparable. However, there is evidence to suggest that marine sand and gravel imports into Berkshire show an increasing trend, over a nine-year period, with a steady trend over the past 4 years.

4.4 The AM 2023 National collation data provides details on the sources of the imported marine sand and gravel and highlights that the main source is from Greater London which suggests that this is marine dredged material that has been landed at London wharves, probably by rail. The second greatest source continues to be Medway, also confirmed in the AM2014. It is likely that this material will have travelled into Berkshire by rail, but it is also possible that the mineral was transported via road.

4.5 Any additional provision would preferably be by rail. As with the importation of crushed rock, there is no current evidence to suggest a need for increased capacity at the rail depots surrounding and servicing Central and Eastern Berkshire, although existing capacity should be safeguarded.

5. Recycled/Secondary Aggregates

5.1 Data pertaining to sales of recycled or secondary aggregates is collected annually as part of the AM surveys carried out by mineral planning authorities. Figure 5 shows the location of active recycled aggregate sites in operation in Central and Eastern Berkshire during 2024 that were surveyed. It should be noted that whilst the sites were surveyed, none of the recycled aggregate sites responded. As such, the results are based on responses from previous years or estimates from the Environment Agency so should be treated with caution and used only to indicate a general trend of what is happening (see Table 7).

Table 7: Active recycled aggregate capacity, 2024

Facility Name	Unitary Authority	Estimated Capacity (tonnes) 2024
Datchet/Riding Court Farm	Windsor & Maidenhead	75,000
Horton Brook	Windsor & Maidenhead	200,000
Total		275,000

Source: AM Survey 2024

5.2 Table 6 shows that there is very little aggregate recycling capacity, with an estimated capacity of 275,000 tonnes in the Central and Eastern Berkshire region at just two sites. This is an increase on last year thanks to the permission granted in 2023 for the recycled aggregates site at Horton Brook, which was an allocated site in the Joint Minerals and Waste Plan. It is unclear why existing permissions are not being implemented. There may be mobile recycling facilities which are not being captured through the planning process or an over-reliance on neighbouring areas. This will need to be monitored and reviewed as necessary.

5.3 Figure 6 shows the location of active recycling sites in Central and Eastern Berkshire.

Figure 6: Location map of active recycled aggregate sites in Central and Eastern Berkshire, 2024

5.4 The sales figures of the recycled and secondary aggregate in Berkshire for the most recent 10-year period, 2015-2024 are shown in Table 8.

Table 8: Recycled and Secondary aggregate sales in Central and Eastern Berkshire, 2015-2024 (Thousand tonnes, Tt)

Year	2015	2016	2017	2018	2019	2020	2021	2022	2023	2024	10 yr average	3 yr average
Central & Eastern Berkshire	103	128	131	138	92	89	117	77	67	64	103	87

Source: Aggregate Monitoring Surveys, 2015-2024

5.5 Sales for Central and Eastern Berkshire dropped significantly in 2019 breaking the previous trend of increasing sales. These figures have continued to fall in 2020 to 89Tt, following the closure of Hindhay Quarry's and Bray's recycling facilities. Sales fell further still in consecutive years from 77Tt in 2022 to 64Tt in 2024. Previously data in this section was compared to the wider Berkshire region for context as 10-years of data was not available for the Central and Eastern Berkshire scale. It provided context in the absence of past data. Now that a complete data set has been collected, the Berkshire data will no longer be published.

6. Future Aggregate Demand

Construction project demands

6.1 Infrastructure projects are likely to place an additional demand on the future supply of aggregates in Central and Eastern Berkshire. These relate to both housing, supporting facilities and transport projects. A revised housing method has been proposed to calculate the required housing delivery, resulting in a significant increase in housing figures for the Central and Eastern Berkshire authorities. Using the government's outcome of the new Local Housing Need (LHN) figures, there has been a shift between the pre-2024 housing calculation (standard method) of 3055 houses per annum to 4579 houses per annum under the new standard method. the requirement for Central and Eastern Berkshire over the plan period is in the region of 47,000 new homes (based on the standard method for calculating Local Housing Need). The shift by authority is shown in table.

Table 9: Local Housing Need calculations by area

	LHN under the previous standard method	LHN under the new standard method	Average Annual Net additions (2021/22 2023/24)
Bracknell Forest	563	766	688
Reading	878	1028	920
Wokingham	768	1316	1059
RBWM	866	1449	487
	3075	**4559**	**3154**

Source: New Standard Method[12]

6.2 Other National Infrastructure projects within 30-50 miles of Central and Eastern Berkshire include the potential of an additional runway at Heathrow[13], the Datchet to Teddington flood defences, improvements to the M25 and M3, and upgrades to the M4 motorway[14].

6.3 All these projects are of significant scale and require the future demand to be accounted for in future aggregate supplies, over and above the annual

[12] Local Housing Need: New Standard method - https://view.officeapps.live.com/op/view.aspx?src=https%3A%2F%2Fassets.publishing.service.gov.uk%2Fmedia%2F675aaeca9f669f2e28ce2b91%2Flhn-outcome-of-the-new-method.ods&wdOrigin=BROWSELINK

[13] Heathrow Expansion (2025) - https://www.heathrow.com/company/about-heathrow/expansion

[14] Oxford-Cambridge Arc (2023) - Analysis of the National Infrastructure and Construction Pipeline 2023 (HTML) - GOV.UK (www.gov.uk)

infrastructure delivery programme. The Infrastructure Delivery Plans for each authority contains more information on the level of future development planned for the area, which cumulatively will place additional pressure on aggregate supplies.

6.4 The indication is of sustained infrastructure delivery in the future within the Central and Eastern Berkshire area, leading to an increase in future aggregate demand.

6.5 To meet future aggregate demand, including the infrastructure projects discussed above, Central and Eastern Berkshire needs to maintain a sufficient aggregate landbank and a greater emphasis should be placed on encouraging recycled and secondary aggregate sites to supply future demand.

6.6 Central and Eastern Berkshire is reliant on imports of aggregates, therefore looking at sales of aggregate in isolation does not represent current demand.

6.7 In addition to the 10 years rolling sales data, other relevant information relating to future need has also been assessed. These include forecasts and data from national bodies relating to demand, growth and future need. A range of relevant growth forecast factors have been applied to the sales data returned this year to gauge whether the 10-year average sales data is an appropriate provision rate, or whether there is likely to be an increase or decrease in this demand. It is accepted that 10-year sales data do encompass trends but can be slow to adjust to rapid trends.

6.8 The approach whereby growth factors are applied to sales data returned that year has been used consistently for the past 7 years in the LAA's produced by the Central and Eastern Berkshire authorities.

6.9 A range of growth factor forecasts were used to assess future demand levels. These include:

- Construction growth factor – including +1.9% in 2025 followed by +3.9% in 2026[15]
- Bank of England GDP growth factor – +1.2% 2025, +1.3% in 2026, +1.5% in 2027 and +1.7% in 2028[16]

6.10 The data reported in this LAA has shown a decline in sales, which the Mineral Products Associated has attributed to delays in permissions, high financing

[15] Construction Growth Factor - Construction Industry Forecasts - Summer 2024 (constructionproducts.org.uk)

[16] Bank of England Growth Factor - Monetary Policy Report - February 2023 | Bank of England

costs and rock-bottom investor confidence[17]. The growth factors listed in paragraph 5.16 are showing positive growth compared to those in previous LAAs. It is a very difficult time to forecast future demand, particularly over a longer time frame such as the Plan period. However, using the best information available at this time helps to make a more robust estimate on the appropriate APR to set for each aggregate.

6.11 The following sections therefore look at forecasting to the end of the plan period, 2036.

Sand and Gravel

6.12 The growth factors listed in paragraph 6.9 were applied in turn to the 2024 reported sales figure for sand and gravel and forecast to the year 2036. Reviewing the output of those growth factors, the annual provision rate (APR) is set at **0.53Mt**.

6.13 This is based on the 10-year average sales figure. This is a slight reduction on the 2023 rate, reflecting the ongoing period of lower sales, but considered to better reflect the future level of demand. The annual LAA will allow for this rate to be kept under review and revised as necessary.

Recycled and secondary aggregate

6.14 The growth factors listed in paragraph 6.9. were applied in turn to the 2024 reported sales figure for recycled and secondary aggregate and forecast to the year 2036. Reviewing the output of those growth factors, the annual provision rate (APR) is set at **0.07Mt**.

6.15 This is based on the 3-year average sales figure, which was more in line with the forecast figures. This is lower than the 2024 rate, reflecting a sustained period of lower sales.

6.16 The APR figures set out in this section have been derived using the relevant data and information. The forecast figures and the use of 10-year sales data have informed the decision on the rates. All rates will be kept under review and revised as appropriate in the next LAA.

[17] Mineral Products Association: Demand for construction materials stuck at crisis levels warns MPA (2025) - https://www.mineralproducts.org/News/2025/release35.aspx

Landbank

6.17 The NPPF[18] requires Mineral Planning Authorities to make provision for the maintenance of a landbank of at least seven years for sand and gravel. The seven-year landbank stipulated is the absolute minimum level of provision required, and Mineral Planning Authorities should seek to maintain a landbank above this level.

6.18 Reserves of sand and gravel in Central & Eastern Berkshire with planning permission for extraction (permitted reserves) on 31 December 2024 were 4,814,000 tonnes (discounting Star Works as this is inactive).

6.19 Table 10 shows that a landbank based on 2024 sales figures is 11.4 years. The total landbank for all land-won aggregate based on 10-year average is 9.1 years which is above the 7 years required by the NPPF. Based on 3-year average sales the landbank is also 10.2 years.

6.20 Application of the 2024 APR Rate results in a landbank of 9.1 years.

Table 10: Central and Eastern Berkshire sand and gravel reserves and landbank 2024

	Permitted Reserve (Tt)	Landbank based upon 10yr average sales between 2015 2024 (years)	Landbank based upon 3yr average sale between 2022 2024 (years)	Landbank based upon 2024 sales (years)	Landbank based on 2024 APR Rate
Total Sand & Gravel	4814	9.1	10.2	11.4	9.1

Source: Aggregate Monitoring survey data.

Future provision of sand and gravel

6.21 The adopted Joint Plan period is up to 2036 and outlines a requirement of 5,447,000 tonnes of sand and gravel during the life of the Plan.

6.22 The Plan contains Development Management policies and allocations. The allocations include two sharp sand and gravel extension sites, an aggregate wharf and one aggregate recycling site. No soft sand sites were identified for inclusion in the Plan. The proposed allocations are not sufficient to meet the

[18]National Planning Policy Framework, Para. 2019(f) (December 2024) - https://assets.publishing.service.gov.uk/media/67aafe8f3b41f783cca46251/NPPF_December_2024.pdf

identified needs of Central and Eastern Berkshire and therefore, the allocations are supported by criteria-based policies and in the case of sand and gravel, an 'Area of Search' to enable further development proposals to come forward.

6.23 There is no available soft sand sales data to determine what the future demand of soft sand during the Plan period will be. A study was undertaken during 2019 to identify where soft sand is supplied from. It concluded that soft sand is supplied to Central & Eastern Berkshire from a range of neighbouring authorities and is not reliant on any one source.

6.24 As the Plan area is reliant on imports, sources of this supply will need to be secured from elsewhere. However, neighbouring authorities such as West Berkshire, Hampshire and Surrey have constrained soft sand resources due to National Landscapes and the South Downs National Park. Therefore, future supply may need to be considered from alternative sources such as marine or brought into the Plan area from greater distances. However, it is recognised that greater distances are less sustainable due to the transport impacts.

Capacity

6.25 Site capacity was included as part of the Aggregate Monitoring 2024 survey. By understanding current capability of sites, through capacity, it is hoped that this information can be used to assist planning for future demand. For the second consecutive year, capacity data was not received so the estimated results shown in Table 11 are based on previous survey responses.

Table 11: Total sales and estimated production capacity, 2024

	Sales (Mt)	Capacity* (Mt)	% Sales / Production	Capacity 3 yr average (Mt)
Land-won Aggregate	0.42	1.19*	35%	1.19
Recycled Aggregate	0.06	0.275	22%	0.18

Source: Aggregate Monitoring Survey, 2024. Please note collecting capacity data from operators in this manner is still in early stages and therefore the results should be treated with caution

*Capacity data based on 2022AM Survey

6.26 Capacity for land-won aggregate can be assumed to have remained at a consistent level over seven years. There was a slight decrease in 2022, from 1.25Mt to 1.19Mt (-5%). There is no capacity data available for 2024 (nor 2023), as none of the site operators responded with this data in the 2024 AM survey. Instead, we have used an estimate from planning permissions to gain an understanding of the capacity that may be available at the sites.

6.27 Capacity for recycled aggregate decreased by 0.1 Mt in 2023, a significantly larger decrease than what has been seen in the past three- years and it is presumed it has not further decreased. Permission was granted in 2023 for a new site (Horton Brook) which has increased capacity in 2024. Overall, it is assumed capacity for recycled and secondary aggregates currently sits at around 80%.

6.28 It is possible to compare sales with capacity to understand void production capacity. Table 10 indicates that for land-won aggregate, that there is sufficient capacity to accommodate any uplift in demand as a result of future development.

6.29 The returns data suggests that recycled and secondary aggregate sites are also currently operating significantly under capacity. Although capacity has been steadily decreasing, sales have also been decreasing so there is still operational capacity to accommodate an uplift in sales, with recycled and secondary sites currently operating at 80%.

6.30 It is worth noting that not all operators returned information on capacity, and therefore the capacity data provided is not 100% accurate. There was a particular lack in return data provided for recycled and secondary aggregate sites. Data on recycled aggregate is notoriously difficult to determine due to the temporary nature of sites and the potential for unauthorised operations.

7. Conclusions and review of the LAA

7.1 This LAA has shown that Central and Eastern Berkshire's current local aggregate provision will impact on the wider South East region as a whole if new minerals development is not enabled to meet the forecast demand up to 2036.

7.2 Following a review of the current economic climate and future forecasts, the 2024 APR Rate is set at 0.53 mtpa for sharp sand and gravel. This rate will be kept under review.

7.3 Due to the lack of suitable resources, Central and Eastern Berkshire is reliant on supplies from other mineral planning authority areas which will need to be considered in other Mineral Local Plans through strategic cross-boundary liaison. This could be supported by Statements of Common Ground, which take into account the current sources of minerals whilst recognising the constraints on resources in some neighbouring areas and the potential impact this may have on future supply.

7.4 The need for any additional infrastructure, such as the further requirement for land-won extraction, is identified in the adopted Joint Minerals and Waste Plan and will be monitored through LAAs. Where it was not possible to identify sufficient sites to meet the identified needs of Central and Eastern Berkshire, the Joint Plan contains enabling policies to allow further opportunities to arise during the life of the Plan. The sand and gravel policy is supported by an 'Area of Search' to demonstrate the distribution of resources of sand and gravel across the Plan area to encourage suitable proposals to come forward for consideration.

A summary of this document can be made available in large print, in Braille or audio cassette. Copies in other languages may also be obtained. Please contact Hampshire Planning and Transport by email berks.consult@hants.gov.uk.