Suffolk Local Aggregates Assessment

2021 – 2022 Data.

November

2024

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For more information about our minerals and waste planning policy go to:
https://www.suffolk.gov.uk/planning-waste-and-environment/planning-applications/minerals-and-waste-policy/

Cover photograph acknowledgements:

1. Gt Blakenham Energy from Waste Facility, courtesy of SUEZ Recycling and Recovery UK Ltd, and;

2. Cavenham Quarry, with permission from Allen Newport Ltd.

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1. EXECUTIVE SUMMARY

1.1 Paragraph 219 National Planning Policy Framework (NPPF 2023) states that Minerals Planning Authorities, including Suffolk County Council, should plan for a steady and adequate supply of aggregates.

1.2 Besides indigenous land-won sand and gravel, the supply of aggregates to Suffolk is made up from sand and gravel imported from surrounding counties, imported crushed rock, marine dredged sand and gravel, and indigenous and imported recycled construction, demolition & excavation waste (CD&E waste).

1.3 Aggregates are vital for continued economic growth including house building. Aggregates are sold loose in an as-raised form or processed into different grades of fine and coarse aggregate, or they may be used to make concrete, mortar and asphalt, or other products.

1.4 The issues to be taken into account in the provision of aggregates are set out in the NPPF and the Planning Practice Guidance website (PPG). This includes the preparation of a Local Aggregates Assessment (LAA) based upon a rolling average of ten years' sales data and other relevant local information, and an assessment of all supply options (including marine dredged, secondary and recycled sources).

1.5 The LAA (2021 – 2022 data) sets out in more detail how the demand for construction aggregates is met within Suffolk through the Suffolk Minerals & Waste Local Plan 2020.

1.6 This LAA is for 2 years as a result of staff pressures within the department following the Covid pandemic. The data has been considered by the East of England Aggregates Working Party and has followed the shared methodology.

Sand & gravel summary table		
Average of last ten years sand & gravel sales	1.077 Mt	Down
Sand & gravel landbank on 31 December 2022 (Mt)	9.555 Mt	Down
Landbank on 31 December 2022 (years)	8.9 years	Down
Shortfall in provision to 2036	5.493 Mt	Down
Suffolk Minerals and Waste Local Plan (available reserves)	13.770 Mt	Same
Likely to be worked during Plan period	11.180 Mt	Same
Planned safety margin	20%	Down
Average of last three years sand & gravel sales	1.083 Mt	Down

2. Introduction

2.1 The NPPF (paragraph 219 – Maintaining supply) describes LAAs as having three elements:

- A forecast of the demand for aggregates based on both the rolling average of 10 years sales data and other relevant local information;
- An analysis of all aggregate supply options, and;
- An assessment of the balance between demand and supply.

2.2 The following document addresses these requirements, although not in the same order.

3. Demand & supply overview

3.1 Recycling is making an important contribution, although potential further growth in use is limited by available CD&E waste and limitations imposed by the quality of the recycled aggregates.

3.2 Imported crushed rock is also making an important contribution, although further growth in use is uncertain due to constraints on the productive capacity of existing resources in the East Midlands, the capacity of transport infrastructure in the South West, the unfavourable sustained inflation happening in the industry and the wider economy, currency exchange rate of resources in Europe, and the considerable demand for aggregates from projects such as Hinkley Point C and Sizewell C Nuclear Power Stations.

3.3 Although there are large permitted reserves of marine dredged sand and gravel off the coast of East Anglia, market forces dictate that the vast majority of this is landed in London or landed elsewhere and transported by rail to London.

3.4 Recent levels of sand and gravel extraction have fluctuated in recent years, due to economic pressures combined with the Covid pandemic, however the long term trends of sand and gravel use show similar levels are being extracted alongside a decreasing level of reserves.

3.5 The general location of sand and gravel resources can be seen on the Suffolk Minerals & Waste Local Plan 2020 (the “Plan”) Proposals map (see link below).

3.6 https://www.suffolk.gov.uk/asset-library/imported/smwlp-development-scheme-2018.pdf

3.7 The general location of the major statutory landscape and ecological constraints is shown on the Minerals & Waste Key Diagram of the Plan.

3.8 House building is often used as a proxy for forecasting future demand for aggregates. Review of published Local Plans suggests that housing need across Suffolk currently stands at 3,162 dwellings per annum. In the period 2021-2022, Suffolk saw a total of 3,477 net additional dwellings as a result of new house building completions, conversions, changes of use, demolitions and other

changes to dwelling stock. A comprehensive Housing Report for Suffolk can be seen on the Suffolk Observatory, linked below

Housing - UTLA | Suffolk | Report Builder for ArcGIS (suffolkobservatory.info)

More information on housing need and delivery can be found in the Suffolk Inclusive Growth Framework (see link below), or the most up-to-date Adopted Local Plans.

43f74e_988022cc644f4ac79d4bf0743468fa32.pdf (filesusr.com)

3.9 There are also a number of significant infrastructure projects planned in Suffolk. However, much of this aggregate will be imported. Major road schemes have in the past relied upon imported crushed rock rather than sand and gravel from local quarries or borrow pits.

3.10 Sizewell C was granted development consent on 20 July 2022 by the Secretary of State for Business, Energy and Industrial Strategy (now the Department for Energy Security and Net Zero). Commencement of construction began in early 2024.. From the information provided, it appears that the fill material will be sourced from within the main site itself. High quality aggregates, such as limestone, for use on the power station and/or granite for roads, are not found in Suffolk and would be supplied by road, rail or by sea. Some lower grade concreting aggregates would also most likely be sourced from Suffolk and the surrounding Counties.

3.11 Based on the information presented through the examination in public, itis not likely to be necessary to undertake an early review of the plan to supply Sizewell C with aggregates.

3.12 Further information on Nationally Significant Infrastructure Projects (NSIP) within or close to Suffolk can be found by following the link provided.

https://www.suffolk.gov.uk/planning-waste-and-environment/major-infrastructure-projects/

3.13 Having considered the methodology for forecasting the demand for aggregates based on both the rolling average of 10 years sales data and other relevant local information, it should be recognised that it is especially difficult in assessing other local information in terms of specific demand numbers for those projects, it should also be understood that there is the potential for future problems that might arise that prevent one or more of the proposed sites from being developed. Based on this, the methodology has been to build in some flexibility in the Plan.

4. Recycled aggregates

4.1 Over the last twenty years since the introduction of the Landfill Tax there has been a marked increase in the levels of recycled aggregates being produced, mainly from Construction, Demolition & Excavation waste (CD&E).

4.2 The Suffolk Waste Annual Monitoring Report (2022) sets out in detail the levels of waste management activity within Suffolk, although does not quantify recycled aggregates. This can be accessed by following the link below.

Suffolk Waste AMR Final. Mar 2022

4.3 In addition, the energy from waste facility at Great Blakenham generates approximately 0.050Mt of bottom ash from Local Authority Collected Waste (LACW) into aggregates per annum.

4.4 The types of facilities where recycled aggregates are produced vary from purpose built fixed installations to temporary operations on construction sites. The latter does not require planning permission separately from the County Council. Although the SWS (Suffolk Waste study 2022) does not indicate a specific capacity gap for aggregates recycling facilities in Suffolk, a proposal for such a facility has been approved at Cavenham Quarry.

4.5 If, in the future proposals for aggregates recycling facilities requiring planning permission are made, then there are criteria-based policies included within the existing plan.

4.6 All permitted recycled aggregates facilities are safeguarded within the existing and proposed development plan documents from other forms of competing development.

4.7 The locations of recycling facilities are set out in Appendix 1.

5. IMPORTATION OF CRUSHED ROCK

5.1 Due to its geology, Suffolk has no indigenous resources of crushed rock and therefore relies on supplies imported by road, rail or sea. Crushed rock is used primarily in the production of asphalt for road maintenance and construction due to its strength and roughness.

5.2 There are a number of railheads located along the A14, alongside wharves at Ipswich and Lowestoft which are used for the importation of crushed rock. The wharf at Lowestoft is used for the importation of armour stone for use in sea defence works.

5.3 Although it is not possible to reveal the precise tonnages of crushed rock imported due to commercial confidentiality, it is significant.

5.4 All railheads and wharves handling crushed rock are safeguarded within the existing development plan document from other forms of competing development.

5.5 The locations of aggregates rail facilities are set out in Appendix 2.

6. LANDING OF MARINE DREDGED SAND & GRAVEL

6.1 In terms of the so-called “Regions” along Suffolk coast, there were licences for the dredging of up to 7.1 Mt of sand & gravel within the East Coast Region and

a further 4.35 Mt within the Thames Estuary Region on an annual basis in 2022. Although a significant proportion of this total is dredged, the vast majority of this is landed in London, or sent to London by rail having been landed elsewhere. This is due to the lack of indigenous supplies of aggregates in London.

6.2 Although it is not possible to reveal the precise tonnages of marine dredged sand and gravel sold in Suffolk due to commercial confidentiality, it is not very significant compared to the overall level of licenced resources.

6.3 All aggregates railheads and wharves handling marine dredged sand & gravel are safeguarded within the existing development plan document from other forms of competing development.

6.4 The locations of aggregates wharves are set out in Appendix 3.

7. PROVISION OF LAND WON SAND & GRAVEL

7.1 Historically, sand & gravel workings have exploited good quality river terrace reserves within river valleys. The gradual exhaustion of some of these reserves coupled with increasing environmental protection has encouraged companies to exploit glacial deposits outside of the river valleys.

7.2 In Suffolk, the sand & gravel deposits are generally sand rich so that there is a shortage of stone. The most stone rich deposits are often constrained by the highest order of statutory landscape and ecological designations. The County Council sought sites with higher proportions of stone to be included in the Suffolk Minerals and Waste Local Plan. However, sites received during the plan making process were excluded from the plan as it was considered they could not be made environmentally acceptable, or were in conflict with National Landscape designation.

7.3 Suffolk has always sought to meet the sub-regional apportionment, and national guidelines in past Plans. However, future provision is based upon an average of the last ten years' sales, plus other factors such as house building rates within the adopted Suffolk Minerals & Waste Local Plan.

7.4 The average sales of sand and gravel in Suffolk for the ten years to the 31 December 2022 was 1.077 Mt. Appendix 6 shows the individual sales for the last ten years. The average of the last three years is slightly higher at 1.083 Mt.

7.5 The landbank of permitted sand and gravel reserves on the 31 December 2022 was 9.555 Mt.

7.6 If the landbank of permitted reserves is divided by the average of the last ten years' sales, this would be equivalent to 8.9 years' sales. In theory, if the average of sales is projected forwards, then all of the presently permitted reserves of sand and gravel would run out in approximately September 2030.

7.7 The Plan period ends on the 31 December 2036. Therefore, the shortfall in permitted reserves is 5.52mt based on predicted annual sales between 2023

and 2036 of 1.077mt (the 10-year average). This is equivalent to a shortfall of 5.1 years' worth of sales (5.52/1.077).

7.8 Plan Policy MP1 allocates sites containing 9.300 Mt of sand and gravel. Analysis of the submitted information in the relevant Site Assessment Reports indicates that these sites in total contain 13.770 Mt.

7.9 However, taking into account the proposed start dates and levels of production at new sites, it is estimated that at least 2.59 Mt of the 13.770 Mt will still remain to be worked which reduces the resources likely to be worked within the plan period to 11.180 Mt.

7.10 This would leave a safety margin of 20% which is not considered excessive when considering the difficulty of assessing other local information in terms of specific demand numbers for specific projects and the potential future problems that might arise that prevent one or more of the proposed sites from being developed.

7.11 A further reduction to the potential resources is likely due to planning constraints introduced by the Plan. This mainly relates to the requirement to safeguarding existing field boundaries within sites because of the landscape and ecological importance.

7.12 The Plan allocates nine sites, all but one are extensions to existing workings.

7.13 Planning permission is required for sand and gravel extraction. All sand & gravel workings are safeguarded within the existing and proposed development plan documents from other forms of competing development.

7.14 The locations of existing quarries are set out in Appendix 4.

8. VALUE ADDED PLANTS

7.15 Value added plants include concrete batching plants and asphalt plants. A large proportion of sand & gravel is used in the production of ready mixed concrete typically in the ratio of 4 parts gravel, 2 parts sand, and 1 part cement. The sand and gravel is mostly supplied by local land won sources although marine dredged sand and gravel can supplement the supply.

7.16 The aggregate used in asphalt is different in that the coarse aggregate is crushed rock imported by road, rail or sea.

7.17 Planning permission for concrete and asphalt plants is generally required although the determining authority could be either the County Council or a District Council depending on whether the plant is linked to a quarry or aggregates wharf of railhead in which case it would be the former.

7.18 The locations of existing concrete and asphalt plants are set out in Appendix 5.

9. Proposed Monitoring of minerals & waste Plan

8.1 Appendix 2 of Suffolk Minerals & Waste Local Plan sets out the proposed monitoring arrangements once the Plan has been adopted. See following link and look under the previous consultations tab.

Suffolk Minerals and Waste Plan - Suffolk County Council

10. Duty to cooperate

9.1 The duty to cooperate was created in the Localism Act 2011 and amends the Planning and Compulsory Purchase Act 2004. It places a legal duty on local planning authorities, county councils in England and public bodies to engage constructively, actively and on an ongoing basis to maximise the effectiveness of Local Plan preparation in the context of strategic cross boundary matters.

9.2 Suffolk County Council as Minerals and Waste Planning Authority continues to sit on both the East of England Aggregates Working Party and the East of England Waste Technical Advisory Body. In both case the statistical basis for the provision of aggregates and the management of waste in Suffolk has been scrutinised by both bodies.

9.3 The statistical basis for aggregates provision within Suffolk is updated by this document. The statistical basis for waste management provision is updated by the Suffolk Waste Study 2022 which can be found by following the link provided below and looking under the evidence base tab.

https://www.suffolk.gov.uk/asset-library/suffolk-waste-amr-final.-mar-2022.

APPENDIX 1

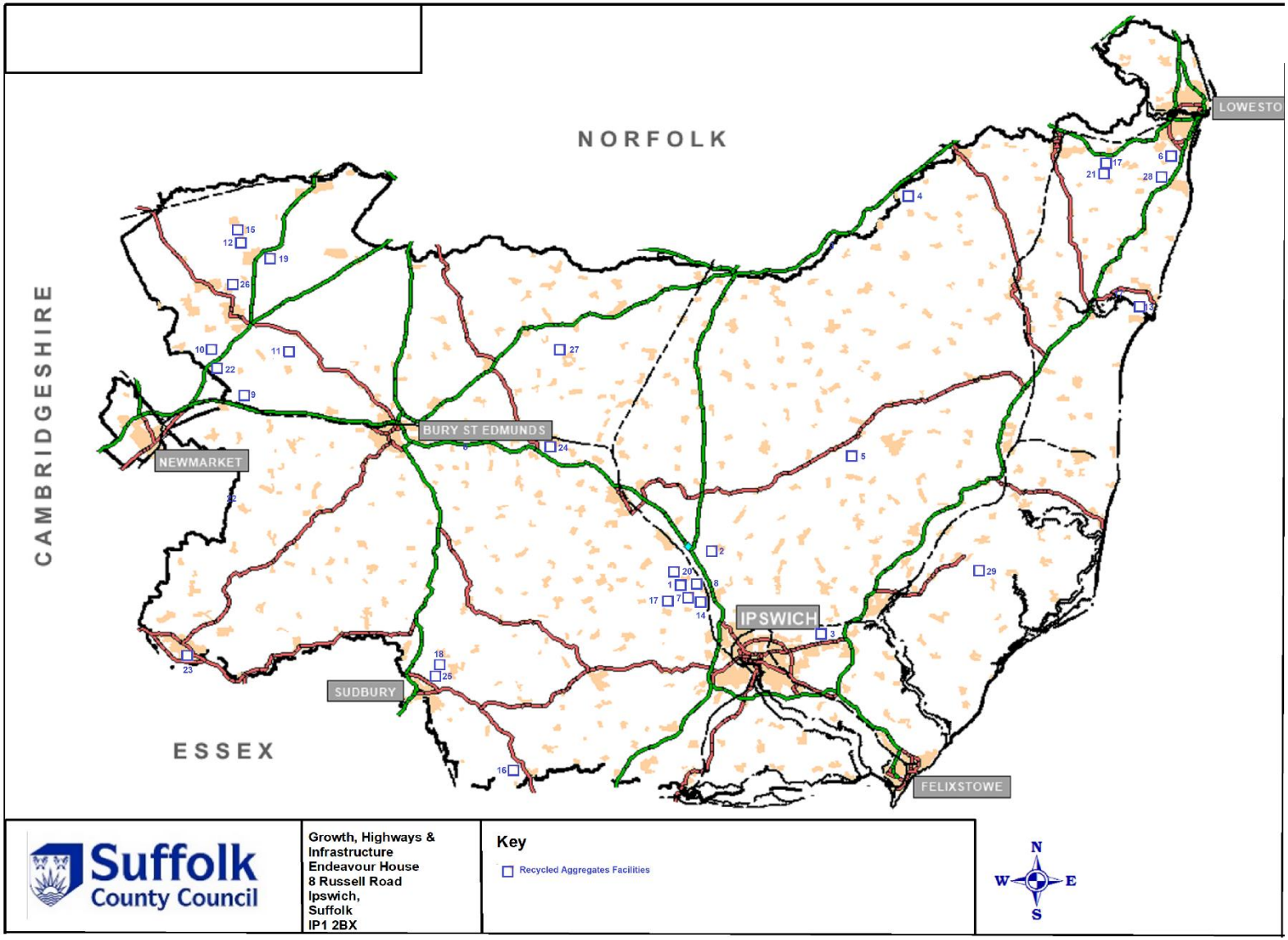
RECYCLED AGGREGATES IN SUFFOLK

Recycled aggregates facilities				
Site Number	**Site Name**	**Operator**	**Grid Ref**	
			Easting	**Northing**
1	Bolton Brothers Recycling Centre (MRF)	Bolton Brothers	612153	249700
2	Shrubland Park	Brett Aggregates	612000	253700
3	Sinks Pit	Tippers R Us	621498	245495
4	Flixton Quarry (Site A)	Breedon	629800	286500
5	D J Spall Recycling Ltd	D J Spall Recycling	626551	255006
6	Former Brickworks and Pipework's site (Lowestoft)	EE Green & Son	652400	288500
7	Malting Farm	HF and JT Few	611257	251806
8	Broomfield Pit	Tarmac	612200	251500
9	Gazeley Secondary Agg. Production	Tarmac	571889	267193
10	Bay Farm Quarry, Worlington	Mick George	569410	271743
11	Marston's Quarry	Middleton Aggregates	575925	271485
12	Old Chicory Factory	Murfitts Industries	572492	286426
13	Sole Bay Recycling	Murray Graham	649862	276551
14	S Sacker (Claydon) Ltd	Sackers Recycling	612299	250377

15	Causeway Pit, Lakenheath	Sutton Services	570700	282200
16	Harpers Hill Farm	T D & A M Bugg	596400	234900
17	Beccles Civic Amenity Site	Radical Waste	645143	288605
18	Chilton Grove Works	Wiles Contractors Limited	587917	243351
19	Lakenheath Recycling Centre, Brandon Road	Elveden Farms	573383	279879
20	Claydon Skips Ltd, Masons Landfill	Claydon Skips	611604	250142
21	Ellough Waste Transfer Station	V C Cooke	644051	288533
22	Barton Mills Chalk Quarry	Needham Chalks (HAM)	571059	272238
23	Falconer Road, Haverhill	McFitch Waste Management	568045	244553
24	Lawn Farm, Wetherden	Aggmax	599309	262979
25	Chilton Concrete Recycling Facility, Chilton Airfield	T & K Weavers Demolition	587917	243351
26	Holywell Row Waste Recovery Site	A & S Topsoils	570672	278265
27	R & D Construction Depot, Summer Road, Walsham le Willows	R & D Construction	599362	272131

29	Solar Farm, Church Road, Gisleham	Ley Plant	652488	288370
30	The Control Tower (Recycling) Bentwaters	John Kemble	634136	252681

Location of recycled aggregates facilities in Suffolk

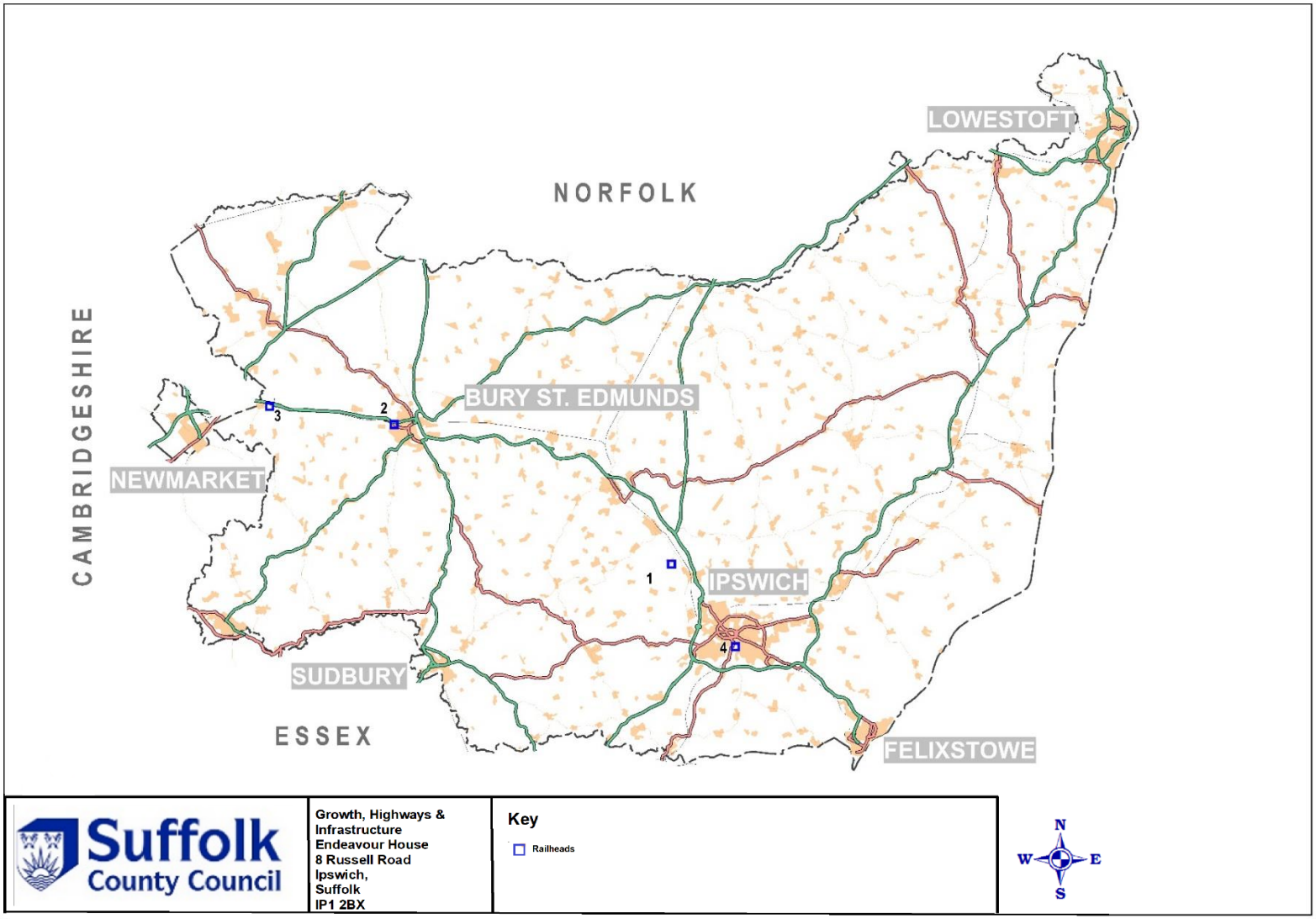


APPENDIX 2

AGGREGATES RAILHEADS IN SUFFOLK

Railheads				
Site Number	**Site Name**	**Operator**	**Grid Ref**	
			Easting	**Northing**
1	Barham Railhead	Tarmac	611888	251403
2	Bury St Edmunds Railhead	Tarmac	585115	265164
3	Gazeley Railhead (Kentford/Higham)	Tarmac	571872	266987
4	West Bank Terminal, Ipswich	Brett Aggregates	616735	243191

Location of recycled aggregates railheads in Suffolk

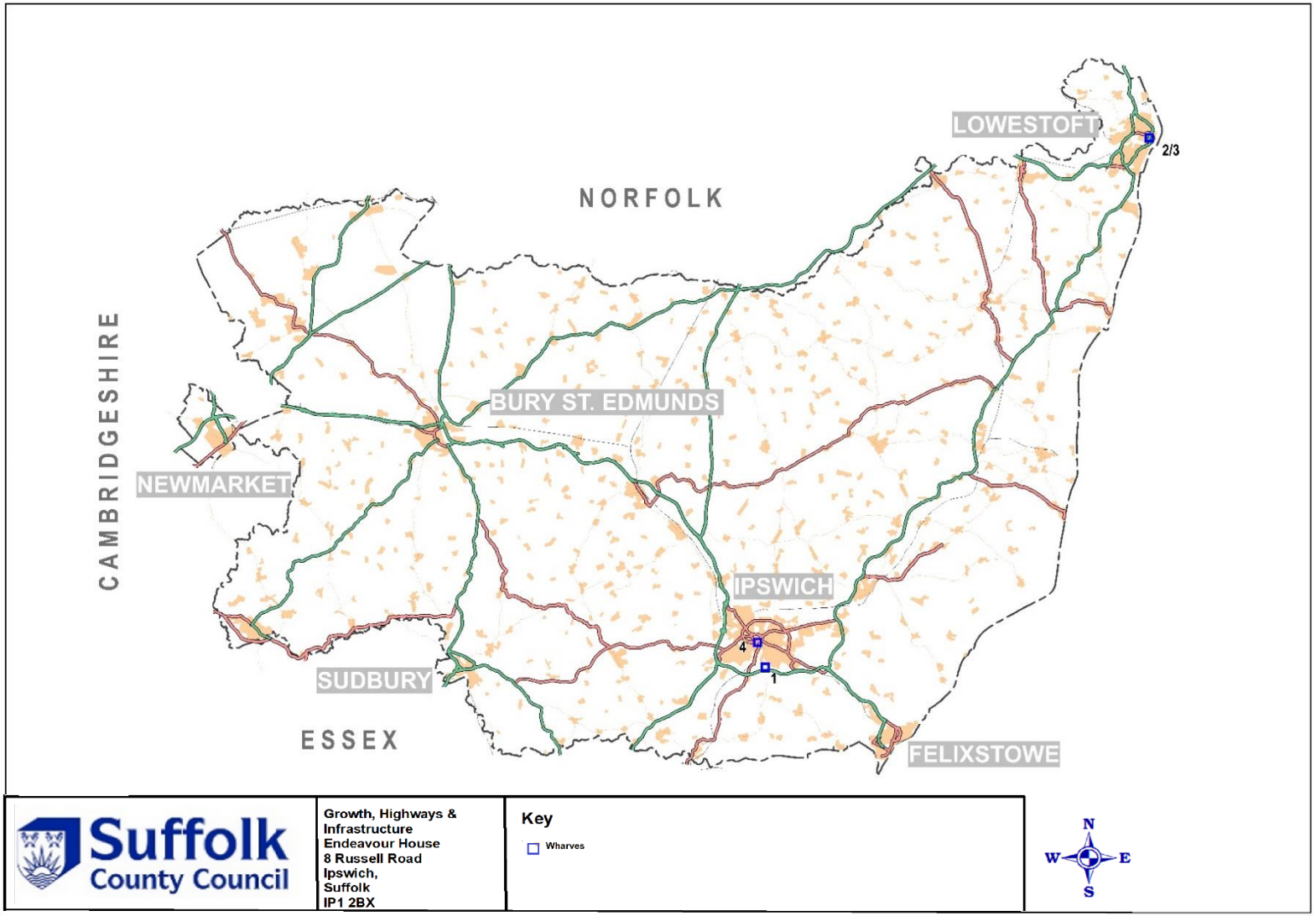


APPENDIX 3

AGGREGATES WHARVES IN SUFFOLK

Wharves				
Site Number	**Site Name**	**Operator**	**Grid Ref**	
			Easting	**Northing**
1	Cliff Quay, Ipswich	Tarmac	616786	242631
2	Hamilton Dock, Lowestoft	Port Authority	655297	293024
3	North Quay, Lowestoft	Dudmans	653603	292906
4	West Bank Terminal, Ipswich	Brett Aggregates	616627	242800

Location of recycled aggregates wharves in Suffolk



APPENDIX 4

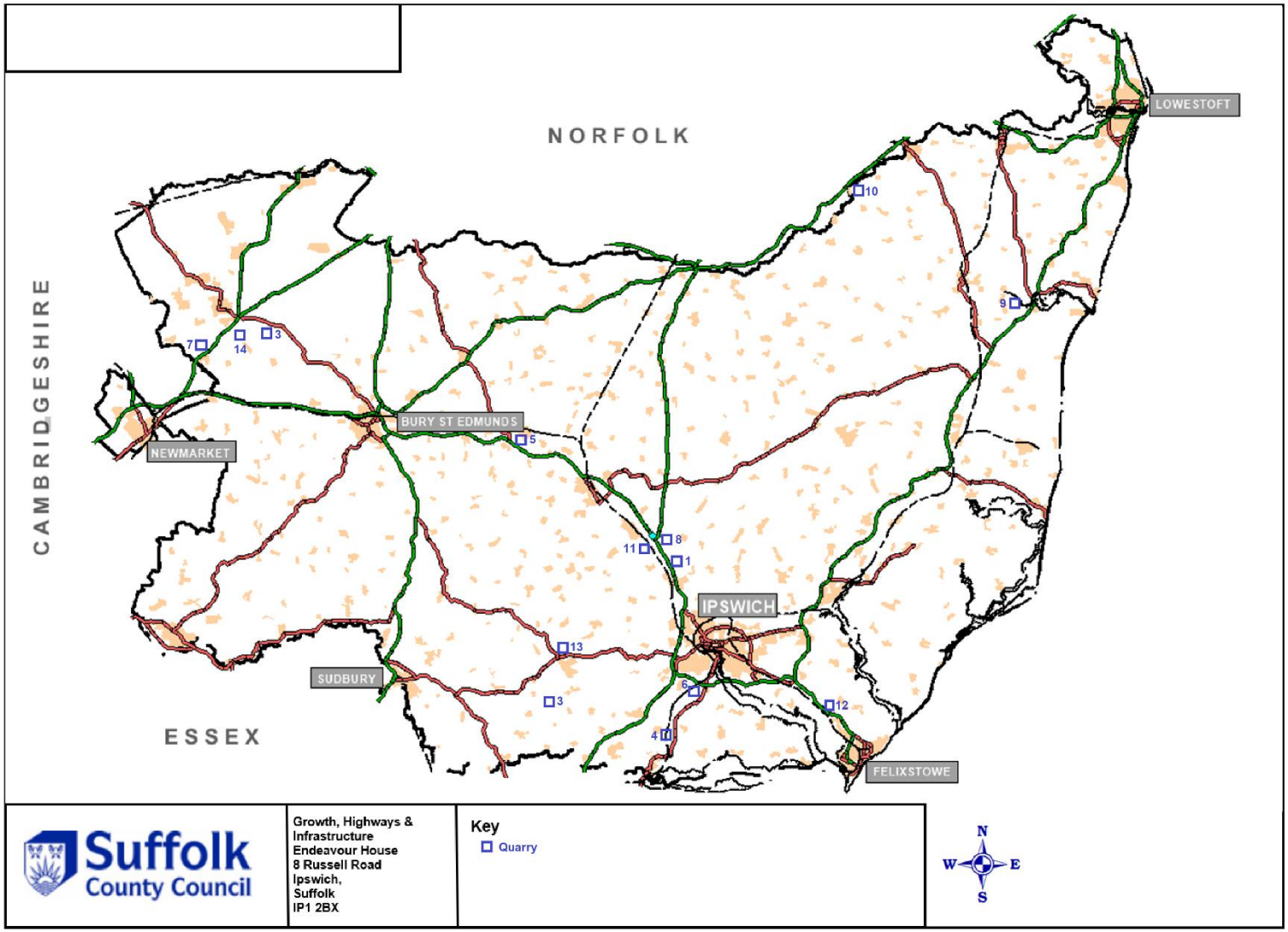
QUARRIES IN SUFFOLK

Sand and gravel quarries				
Site Number	**Site Name**	**Operator**	**Grid Ref**	
			Easting	**Northing**
1	Barham	Brett Aggregates	612116	251410
3	Cavenham	Allen Newport	574789	271383
4	Layham	Brett Aggregates	601392	240221
5	Tattingstone	Shotley Holdings	612162	236274
6	Wetherden	Aggmax	599309	262979
7	Wherstead	Brett Aggregates	613629	239761
8	Worlington	Frimstone	569860	271290
10	Shrubland Quarry	Brett Aggregates	612000	253700
11	Henham Quarry	The Lyndon Pallet Group	645303	279091
12	Flixton Quarry	Breedon	629925	286424
13	Gallows Hill Quarry	Tarmac	610470	253714
14	Red House Farm Quarry, Bucklesham	Tarmac	625495	240481
15	Peyton Hall Quarry	Buffalo Crow	602216	244414

Chalk quarries

Site Number	Site Name	Operator	Grid Ref	
			Easting	Northing
17	Barton Mills Chalk Quarry	Needham Chalks	571100	272000

Location of quarries in Suffolk



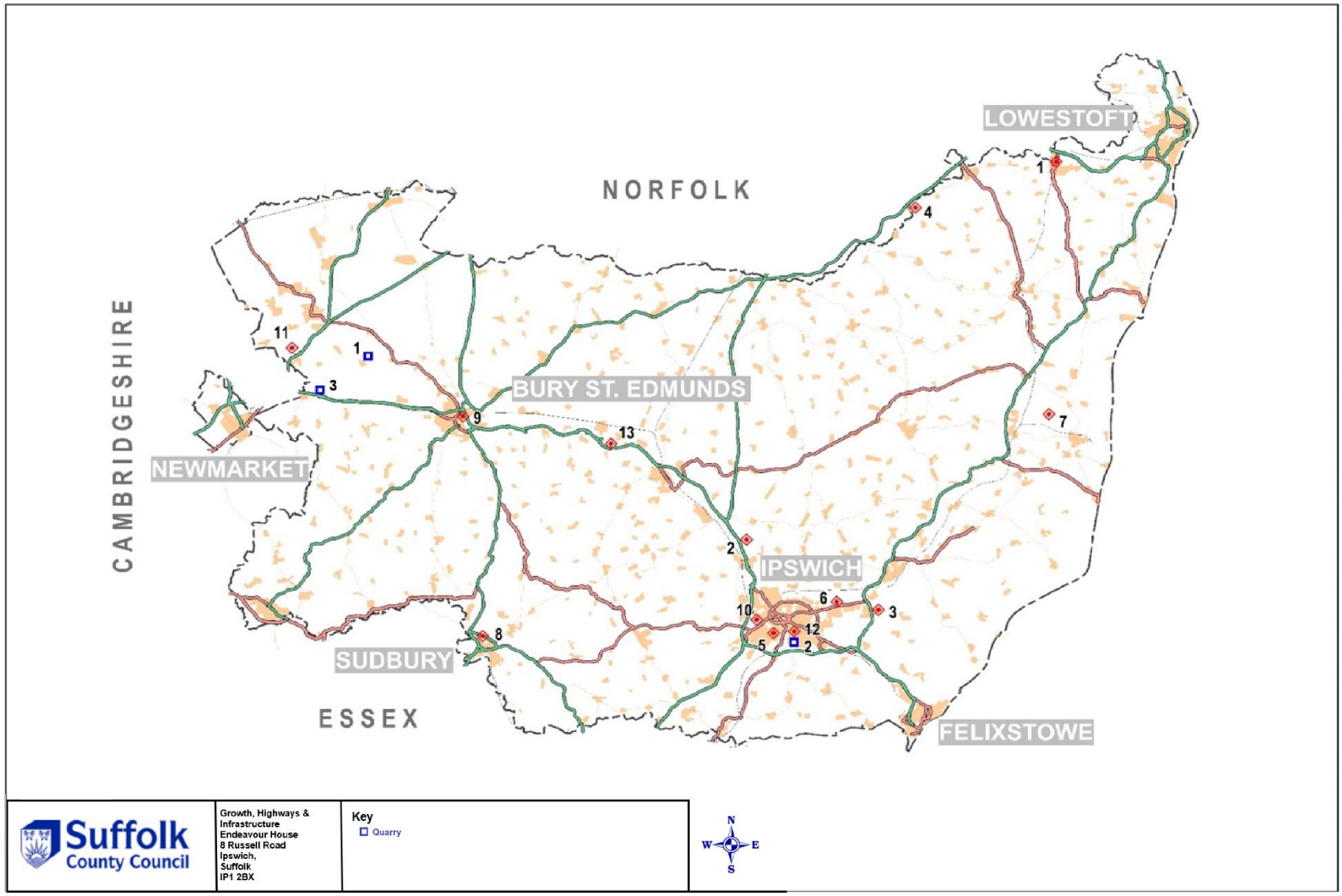
APPENDIX 5

ASPHALT & CONCRETE PLANTS IN SUFFOLK

Asphalt Plants				
Site Number	**Site Name**	**Operator**	**Grid Ref**	
			Easting	**Northing**
1	Cavenham Asphalt Plant	Breedon	574789	271383
2	Cliff Quay, Ipswich	Tarmac	616886	241942
4	Gazeley Asphalt Plant (Kentford/Higham)	Tarmac	571872	266987

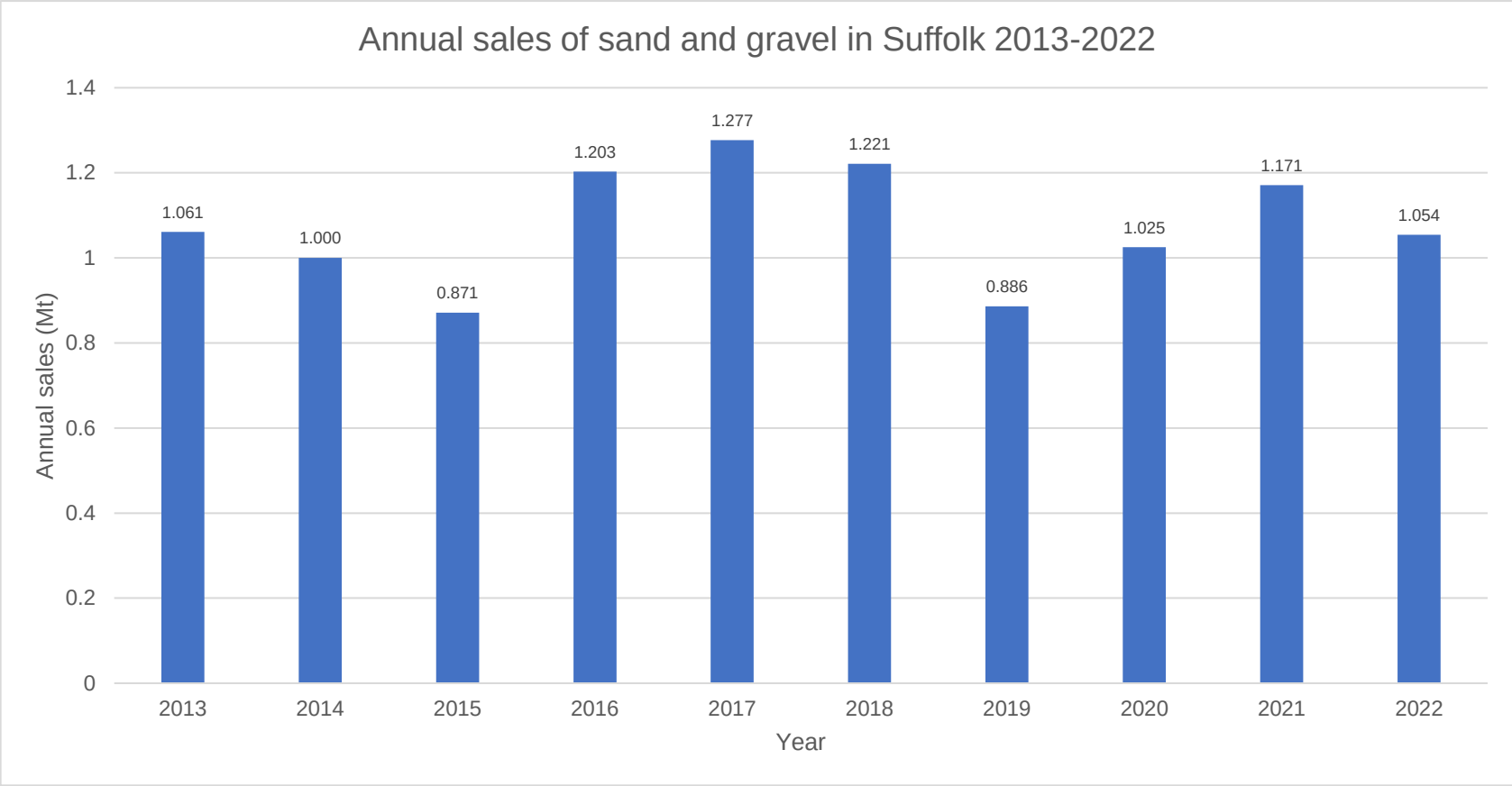
Concrete Batching Plants				
Site Number	**Site Name**	**Operator**	**Grid Ref**	
			Easting	**Northing**
1	Beccles	C&H Quickmix	644745	288790
2	Shrublands Quarry	Brett Aggregates	612000	253700
3	Waldringfield Quarry	Brett Aggregates	625760	244830
4	Flixton Quarry	Breedon	629925	286424
5	Sir Alf Ramsey Way, Ipswich	Cemex	615288	244329
6	Sinks Pit, Kesgrave	Tippers R Us	621498	245495
7	Saxmundham	Breedon	641328	264363
8	Sudbury	Cemex	588560	241494
9	Bury St Edmunds	Eastern Concrete	583952	268693
10	Hadleigh Road, Ipswich	Euromix	614487	245041
11	Worlington Quarry	Hanson Heidelberg Concrete	569860	271290
12	Hanson Concrete, Ipswich	Hanson Heidelberg Concrete	613441	256753
13	Lawn Farm, Wetherden	Aggmax	599445	262427

Location of asphalt & concrete plants in Suffolk



APPENDIX 6

LAST 10 YEARS SALES OF SAND & GRAVEL IN SUFFOLK



APPENDIX 7

SUFFOLK MINERALS AND WASTE LOCAL PLAN POLICY MONITORING

Policy	No. of times policy triggered
General policies	
Policy GP1: Presumption in favour of sustainable development	4 (6)
Policy GP2: Climate change mitigation and adaption	1 (6)
Policy GP3: Spatial strategy and key diagram	1 (6)
Policy GP4: General environmental criteria	7 (6)
Minerals policies	
Policy MP1: Provision of sand and gravel	1 (6)
Policy MP2: Proposed sites for sand and gravel extraction	1 (6)
Policy MP3: Borrow pits	0
Policy MP4: Agricultural and public supply reservoirs	0
Policy MP5: Cumulative environmental impacts and phasing of workings	1 (6)
Policy MP6: Progressive working and restoration	1 (6)
Policy MP7: Aftercare	1(6)
Policy MP8: Concrete batching plants and asphalt plants	2
Policy MP9: Safeguarding of port and rail facilities, and facilities for the manufacture of concrete and asphalt	-
Policy MP10: Minerals consultation and safeguarding areas	-
Waste Policies	
Policy WP1: Management of waste	3

Policy WP2: Proposed site for waste management	3
Policy WP3: Existing or designated landuse	3
Policy WP4: Household waste recycling centres	0
Policy WP5: Open air composting	0
Policy WP6: Enclosed composting facilities	0
Policy WP7: Anaerobic digestion	0
Policy WP8: Proposals for recycling or transfer of inert and construction, demolition and excavation waste	3
Policy WP9: Waste transfer stations, materials recycling facilities, end of life vehicle facilities and waste electrical and electronic equipment recovery facilities	0
Policy WP10: Residual waste treatment facilities	0
Policy WP11: Approval of sites for disposal of inert waste by landfilling or landraise	6
Policy WP12: Approval of sites for disposal of non-hazardous waste by landfilling or landraise	0
Policy WP13: Mining or excavation of landfill waste	0
Policy WP14: Waste water treatment	0
Policy WP15: Transfer, storage, processing & treatment of hazardous waste	0
Policy WP16: Treatment and storage of radioactive waste at Sizewell nuclear power stations	0
Policy WP17: Design of waste management facilities	1
Policy WP18: Safeguarding of waste management sites	0
Minerals sites	
Policy MS1: Barham	1
Policy MS2: Barnham	2
Policy MS3: Belstead	1
Policy MS4: Cavenham	2

Policy MS5: Layham	0
Policy MS6: Tattingstone	0
Policy MS8: Wetherden	0
Policy MS9: Wherstead	0
Policy MS10: Worlington	0
Waste sites	
Policy WS1: Sizewell	1