Suffolk Local Aggregates Assessment 2024 Data

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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/planningapplications/minerals-and-waste-policy/

Contents

Abbreviations 4
Executive Summary 5
Dashboard Summary 7
1. Introduction 10
2. Demand and Supply Overview 13
Aggregate Imports and Exports 16
3. Recycled and Secondary Aggregates in Suffolk 22
Recycled Aggregates 22
Secondary Aggregates (Industrial By-products and Alternative Materials) 23
Conclusion 24
4. Imported Aggregates: Rail Depots and Wharves 25
Aggregates Rail Depots in Suffolk 25
Aggregates Wharves in Suffolk 26
5. Provision of Land-won Sand and Gravel 30
Land-won Sales Trends 30
Sand and Gravel Reserves and Landbank 32
Provision to 2036: Supply Balance and Shortfall 35
Future Demand Growth and Uplift Scenarios 37
6. Asphalt and Concrete Plants in Suffolk 40
Asphalt Plants 40
Concrete Batching Plants 40
Key Findings - Asphalt and Concrete 42
7. Other Relevant Local Information 43
Economic and Industrial Growth 46
8. Monitoring and Review 56
9. Strategic Cross Boundary Cooperation 58
10. Appendices 60
Appendix 1: Recycled aggregates facilities in Suffolk 60
Appendix 2 Aggregates Railheads In Suffolk 63
Appendix 3 Aggregates Wharves In Suffolk 65
Appendix 4 Quarries In Suffolk 67
Appendix 5 - Asphalt & Concrete Plants In Suffolk 69

Abbreviations

AM	Aggregate Minerals (national survey series)
AM2024	2024 Aggregate Minerals Survey (covering 2023 aggregate movements)
AMR	Annual Monitoring Report
APR	Aggregate Provision Rate
AWP	Aggregates Working Party
BT	British Telecommunications plc
CD&E	Construction, Demolition and Excavation (waste)
EfW	Energy-from-Waste
EEAWP	East of England Aggregates Working Party
GGBS	Ground Granulated Blast-furnace Slag
GVA	Gross Value Added
HGV	Heavy Goods Vehicle
IBA	Incinerator Bottom Ash
IBAA	Incinerator Bottom Ash Aggregate
LAA	Local Aggregates Assessment
MPA	Mineral Products Association
MWLP	Minerals and Waste Local Plan
Mt	Million tonnes
Mtpa	Million tonnes per annum
NHBC	National House Building Council
NPPF	National Planning Policy Framework
NSIP / NSIPs	Nationally Significant Infrastructure Project(s)
OBR	Office for Budget Responsibility
ONS	Office for National Statistics
PFA	Pulverised Fuel Ash
PPG	Planning Practice Guidance
POS	Planning Officers Society
SCC	Suffolk County Council
WDI	(Environment Agency) Waste Data Interrogator

Executive Summary

Suffolk's aggregate supply in 2024 comprised indigenous land-won sand and gravel, imports of sand and gravel from other regions, imported crushed rock (no indigenous hard rock in Suffolk), marine-dredged sand and gravel landed at local wharves, and recycled/secondary aggregates from construction waste. This Local Aggregates Assessment (LAA) has been prepared in accordance with the National Planning Policy Framework1 (NPPF, para 226, 2024) and Planning Practice Guidance (PPG) requirements, using a rolling 10-year average of sales data and other relevant local information to plan for a steady and adequate supply of aggregates. Data for the year 2024 has been collected and reviewed by the East of England Aggregates Working Party (EEAWP) following the agreed methodology, and all supply options, including marine-won, secondary, and recycled sources, are considered. Key findings of the 2024 LAA are summarised below.

The table below provides an overview of 2024 aggregate sales in Suffolk, with comparisons to longer-term averages, reserves and landbanks (where applicable), and infrastructure capacity. Arrows (▲▼) indicate trends compared to the previous year's data (upward ▲ = increase, downward ▼ = decrease, level ➔ = little or no change). The Aggregate Provision Rate (APR) is based on the 10-year average sales (except where otherwise noted). Suffolk's landbank is calculated using the 10-year average sales in line with national policy.

[1] National Planning Policy Framework, 2024

Table 1: Suffolk Aggregates Dashboard Summary (2024)

Category	**2024 Sales (Mt)** (% change)	**10-yr Avg Sales (Mt)** (% change)	**3-yr Avg Sales (Mt)** (% change)	**APR (Mt)**	**Reserves (Mt)** (% change)	**Landbank (years)** (% change)	**Capacity** *(Mtpa)*
Land-won Sand & Gravel	**0.74 ▼** (*- 13.7%*)	**1.03 ▼** (*- 2.5%*)	**0.88 ▼** (*- 14.1%*)	1.03	**8.91 ▼** (*- 6.7%*)	**8.65 ▼** (*- 4.2%*)	c1.0 (10 active quarries)
Recycled Aggregates	**0.305**	*No data*	**0.344**	n/a	n/a	n/a	c0.4 (29 sites)
Secondary Aggregates	0.066	*No data*	0.066	n/a	n/a	n/a	Inc. IBA from Great Blakenham EfW
Marine Sand & Gravel (landings)	**0.37 ▲** *(+10.25%)*	*No data*	**0.38 ▲** *(+14.5%)*	n/a	n/a	n/a	c0.4 (2 active wharves)
Crushed Rock Imports	**0.224 ▲**[1]	*No data*	*No data*	n/a	n/a	n/a	Included at wharves (2 wharves and 2 active rail depots c0.2)
Sand & Gravel Imports (rail)	*No data*	*No data*	*No data*	n/a	n/a	n/a	n/a (not surveyed)

[1] Steady increase observed – see Figure 7

Dashboard Summary

Land-won Sand and Gravel

The 10-year average sales is c1.03 million tonnes (Mt) (2015 - 2024). Actual 2024 land-won sales were c0.74 Mt, a notable decline from recent years (the 3-year average is c0.88 Mt). Permitted sand and gravel reserves at the end of 2024 stood at c8.91 Mt, which provides a landbank of about 8.7 years based on the 10-year average demand. This remains above the minimum 7-year landbank required by national policy, but is a slight decrease compared to 2023 (which was c9.0 years). The slight change in landbank reflects ongoing depletion of reserves as sites continue to be worked, partly offset by the granting of around 0.4 Mt of new reserves. A shortfall of approximately 3.45 Mt is projected by the end of the plan period (2036) if no new reserves are permitted (see Supply Balance below), indicating that additional provision will be needed in the long term.

Crushed Rock (Imports)

There are no indigenous crushed rock resources in Suffolk, so all crushed rock aggregate (e.g. limestone, granite) is imported via rail or sea. In 2023, Suffolk's consumption of crushed rock was approximately 0.415 Mt. Two rail depots currently operate in the county to bring in crushed rock, and some rock is also landed at port facilities, these infrastructure sites have capacity to increase imports if needed. In 2024 an estimated 0.224 Mt of crushed rock was imported through Suffolk's wharves, while the remainder of supply came through the rail depots (exact annual rail figures are not published). The rail depots and wharves are vital for reducing long-distance road haulage of aggregate into Suffolk and are safeguarded by local policy.

Recycled & Secondary Aggregates

Suffolk has a well-established network of around 30 permitted facilities producing recycled aggregate from construction, demolition and excavation (CD&E) waste (see Appendix 1). In 2024, the Environment Agency Waste Data Interrogator indicates that these sites produced c300,000 tonnes of recycled aggregate. This constitutes a meaningful contribution to the county's aggregate supply and promotes resource efficiency by reusing waste material. In addition, one quarry (Barton Mills) produces a small amount of chalk as a secondary aggregate for lower-grade uses and bottom ash from the Great Blakenham energy from waste facility results in the production of approximately 50,000 tpa of incinerator bottom ash aggregate. Recycled and secondary aggregates supplement primary land-won materials and while they cannot fully replace the need for land-won sand and gravel (due to quality/specification limits), they do provide an important source for lower-specification uses (e.g. bulk fill, road sub-base), supporting sustainable construction practices.

Marine-won Sand and Gravel

Licensed dredging areas offshore (in the East Anglian coastal waters) provide marine sand and gravel, though historically the vast majority of East Coast marine aggregates have been

landed in the London area rather than in Suffolk. Suffolk currently has two active aggregate wharves, with a combined capacity of around 0.4 Mt per year and in 2024, an estimated 0.37 Mt of marine-dredged sand and gravel was landed at these wharves, maintaining approximately the same level as recent years. This is a relatively small portion of the region's marine production as most dredged material from the East Coast is still shipped to larger markets beyond Suffolk. Marine aggregate landed in Suffolk contributes to the local supply but does not count toward the landbank of land-won reserves.

Infrastructure and Capacity

Suffolk's aggregate supply chain is supported by a robust infrastructure network. There are 10 active sand and gravel quarries across the county, as well as two rail depots importing crushed rock (out of a total of four railheads) and two (out of a total of four) wharves handling marine sand and gravel and occasional rock imports. Additionally, around 30 recycling facilities process waste into secondary aggregates, and there are 3 asphalt plants and 13 concrete batching plants that utilise these aggregate supplies. Most asphalt and concrete plants are co-located with quarries or in industrial areas close to raw materials and markets. The asphalt plants rely entirely on imported crushed rock (with bitumen) since Suffolk has no native rock, whereas the concrete plants predominantly use locally-won sand and gravel. All these facilities have some additional productive capacity to ramp up output if demand increases, and they are safeguarded by Local Plan policies (e.g. Policy MP9) to protect them from incompatible development. Overall, Suffolk's existing infrastructure is currently adequate to maintain supply, but declines in permitted reserves and increasing demand may require new capacity (either new quarry permissions or increased imports) in the coming years.

In summary, Suffolk's indigenous sand and gravel sales have been relatively steady over the past decade (around 1 Mt/year), but 2024 saw a notable drop in sales, reflecting market conditions and project timing. Replenishment of reserves has not kept pace with extraction, causing a downward trend in the reserve base and landbank (now 8.7 years). Alternative sources, including recycled aggregates, imported crushed rock, and marine sand and gravel, continue to play an important role in meeting Suffolk's aggregate needs.

Looking ahead, the combination of rising housing targets, major infrastructure projects (e.g. Sizewell C nuclear power station, highway improvements), and population growth is expected to put upward pressure on aggregate demand in Suffolk. The LAA indicates that while the current landbank is sufficient in the short term, there is likely to be a significant shortfall by 2036 unless additional resources are permitted or reliance on imports increases. Ongoing monitoring and cooperation with neighbouring regions will therefore be crucial to ensuring a steady and adequate supply of aggregates.

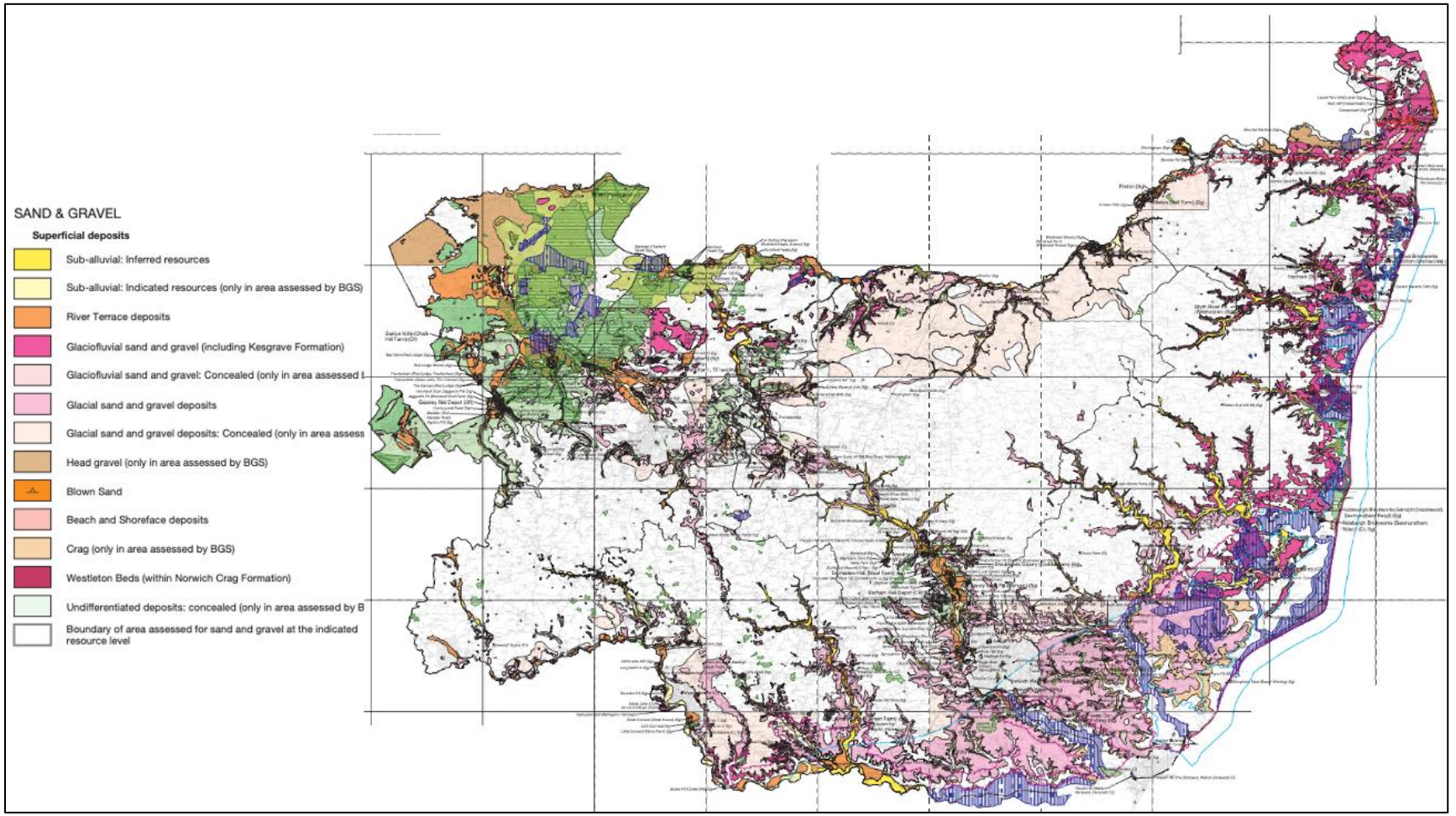

Figure 1 - Map of Economic Geology in Suffolk

1. Introduction

1.1 This Suffolk Local Aggregates Assessment (LAA) is the annual report monitoring the demand for and supply of aggregates in the county. It is prepared in line with the NPPF (2024) and PPG, which require Mineral Planning Authorities to plan for a steady and adequate supply of aggregates by producing an LAA based on a rolling average of ten years of sales data and other relevant local information. The LAA must consider all aggregate supply options, including recycled and secondary materials and imports, and assess the balance between demand and supply. This document addresses those requirements and provides the evidence base for aggregate planning in Suffolk.

1.2 Aggregates (sand, gravel, crushed rock, etc.) are essential raw materials for construction. They are used in the building of homes, schools, hospitals, commercial buildings, and in critical infrastructure such as roads, railways, and flood defences. They may be used directly as bulk fill or processed into products like concrete, asphalt, and mortar. Ensuring a reliable supply of aggregate is therefore vital to support economic growth and development in Suffolk. A shortage or disruption in supply could impact construction costs and delay important projects.

1.3 Suffolk's construction aggregate needs are met through a mix of sources. The primary indigenous source is land-won sand and gravel extracted from local quarries. However, Suffolk has no indigenous hard rock resources, so all crushed rock aggregate (such as limestone and granite for roadstone and concrete) is imported from beyond the county (See Figure 1 above).

1.4 Marine-dredged sand and gravel from the North Sea/Thames Estuary is landed in relatively small quantities at Suffolk wharves to supplement supply. In addition, recycled aggregates produced from construction, demolition and excavation (CD&E) waste, along with a small amount of secondary aggregates (e.g. incinerator bottom ash, industrial by-products, and building chalk), make an important contribution to the overall supply. This diverse supply mix ensures Suffolk's construction industry, encompassing housing, commercial development, and infrastructure, can source materials from a range of providers.

Policy Context

1.5 Paragraph 226 of the NPPF (2024) states that Minerals Planning Authorities should plan for a steady and adequate supply of aggregates by, inter alia, preparing a Local Aggregate Assessment each year. The Planning Practice Guidance (Minerals) further specifies that LAAs should include:

a. A forecast of demand based on the rolling 10-year sales average and other relevant information;

b. an analysis of all supply options (including imports, marine, recycled, secondary sources); and,

c. an assessment of the balance between supply and demand (e.g. whether there is a surplus or shortfall of permitted reserves).

1.6 This LAA follows the structure recommended by the Planning Officers Society and Mineral Products Association (POS/MPA) LAA Guidance (2017), covering each of these elements. It is also aligned with the policies of the Suffolk Minerals and Waste Local Plan (adopted 2020), which provides the strategic framework for minerals supply, including safeguarding of important sites and allocation of new extraction sites.

1.7 This LAA presents and analyses data for the 2024 calendar year (with historical trends shown for context). It builds upon the previous Suffolk LAA which reported 2023 data. Data on sales and reserves of primary aggregates were obtained through the annual minerals survey of operators (conducted via the East of England Aggregates Working Party), while information on recycled aggregates is drawn from the Environment Agency's Waste Data Interrogator. Figures on imports and exports are informed by the four-yearly national Aggregate Minerals survey (AM2024, covering 2023 movements) and local monitoring. Where needed, data has been aggregated to avoid disclosing commercially confidential information (indicated by 'c' where applicable). This LAA was shared with the East of England Aggregates Working Party for comments.

Structure of the Report

1.8 The report is organised into sections addressing each element of aggregate supply and demand as follows:

- Section 2 provides a Demand and Supply Overview, highlighting recent trends and the contribution of various sources.

- Section 3 examines Recycled and Secondary Aggregates in Suffolk.
- Section 4 reviews the Importation of Crushed Rock (via rail depots and wharves) and the Landing of Marine-dredged Sand and Gravel.
- Section 5 details the Provision of Land-won Sand and Gravel, including sales trends, reserve levels, and landbank calculations, and discusses Suffolk's current sand and gravel landbank and future provision (supply balance) relative to the Plan period.
- Section 6 notes the network of Asphalt and Concrete Plants in Suffolk that consume these aggregates.
- Section 7 summarises Other Relevant Local Information (population growth, housing, economic trends, and major infrastructure projects) that may influence future aggregate demand, and the implications for future provision.
- Sections 8 and 9 cover Plan Monitoring and Strategic Cooperation, respectively, outlining how Suffolk County Council engages with neighbouring authorities and regional bodies on strategic aggregate supply matters. All tables and figures are numbered sequentially and referenced in the text.

2. Demand and Supply Overview

Overall Supply Mix

2.1 Suffolk's aggregate consumption is met through a combination of local production and imports. Land-won sand and gravel extraction has historically provided the bulk of local supply, averaging about 1.0 to 1.1 Mt per year over the past decade (see Section 5). However, Suffolk is not self-sufficient in aggregates as it imports significant quantities of crushed rock from other areas.

2.2 The latest BGS Aggregate Minerals Survey (AMS 2023) confirms that Suffolk meets most, but not all, of its own sand and gravel needs. It is estimated that around two-thirds (c66%) of all sand and gravel (land-won and marine-won) consumed in Suffolk is sourced from quarries and wharves within the county, with the remaining one-third imported from neighbouring mineral planning authorities - principally Essex (around 16%), Cambridgeshire (around 6%), Norfolk (around 6%) and Central Bedfordshire (around 1%). Suffolk thus operates as part of a wider East of England market - it is broadly self-sufficient in sand and gravel over time, but both imports from, and exports to, neighbouring authorities are an established and important feature of the supply pattern.

2.3 All crushed rock used in Suffolk is imported, as there are no local rock quarries. Additionally, recycled and secondary aggregates now form a notable part of the supply, reducing (but not eliminating) the need for primary extraction. This diversity of sources (land-won, marine, imported, recycled) provides a measure of resilience and flexibility in Suffolk's supply.

2.4 Figure 2 shows the primary aggregate consumption in Suffolk for the four most recent AMS survey years (2009, 2014, 2019 and 2023). Total consumption has remained broadly stable at around 1.1 - 1.3 Mt over the period (rising from 1.095 Mt in 2009 to 1.270 Mt in 2023, with the highest recorded consumption in 2014 at 1.310 Mt). During the period, there has been a noticeable shift in supply with land won sand and gravel consumption reducing (from 0.767 Mt in 2009 to 0.610 Mt in 2023) and marine-won material consumption increasing substantially (from 0.055 Mt to 0.245 Mt) and crushed rock consumption also increasing (from 0.273 Mt to 0.415 Mt). In proportional terms, land won sand and gravel fell from roughly 70% of total consumption in 2009 to

about 48% in 2023, while marine-won increased from around 5% to 19% and crushed rock from around 25% to 33%.

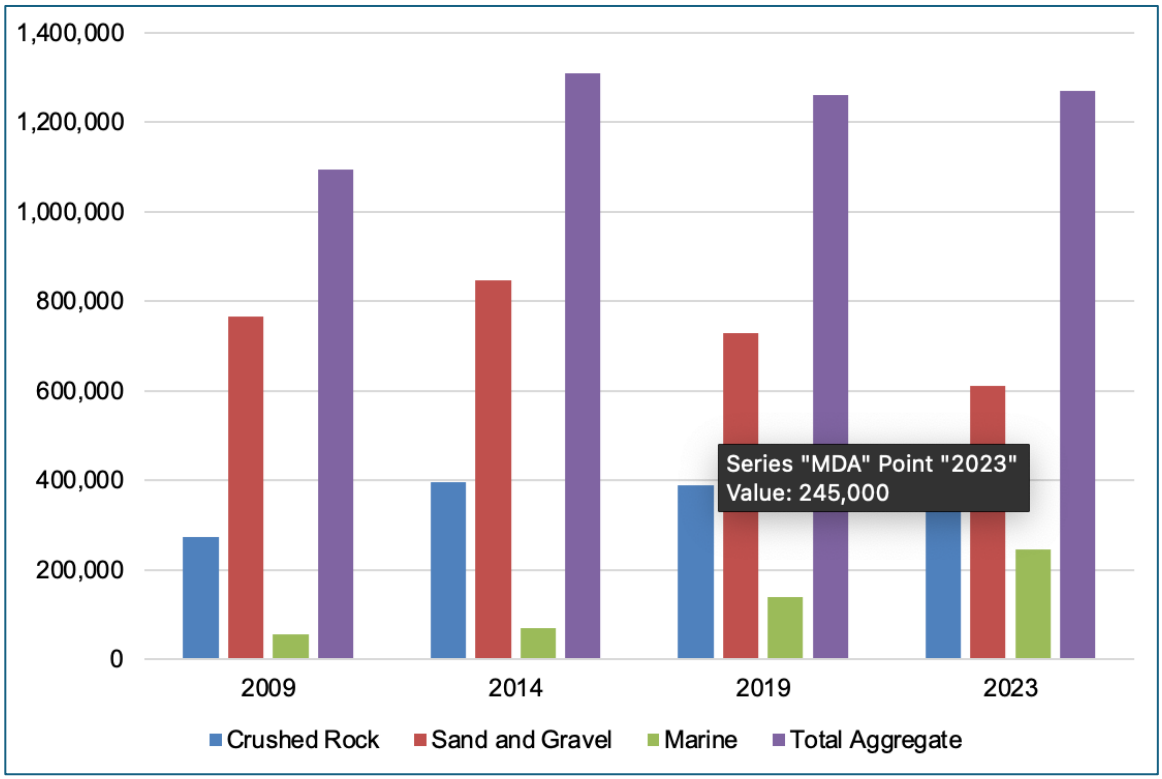

Figure 2: Aggregate Consumption in Suffolk – 2009-2023 (tonnes)[3]

Recycled Aggregates

2.5 Recycling of construction and demolition waste makes an important contribution to Suffolk's aggregate supply. Recycled concrete, brick rubble, asphalt planings, and other materials can all be used as aggregate substitutes. There are physical and quality limitations on how much recycled aggregate can replace primary aggregate (they are often suitable only for lower-specification uses) which means it cannot fully offset the demand for primary land-won material. Nonetheless, this sector remains a key part of Suffolk's supply strategy, supported by planning policies that safeguard recycling sites (see Appendix 1).

Imports of Crushed Rock

2.6 As noted above, Suffolk relies on imports for crushed rock (generally high-quality limestone or granite used in roadstone, concrete, and asphalt). The main sources are quarries in the East Midlands (e.g. Leicestershire) and South West England, as well

[3] Source: Aggregate Minerals Surveys 2009, 2014, 2019, 2023

as imports from Scotland or continental Europe via coastal shipments. The capacity of existing production areas and long-distance transport (rail network constraints, port capacity) can impose limits on how much crushed rock can be supplied. In recent years, some regional quarries have faced output constraints and there have been periods of high competing demand (for example, large infrastructure projects like Hinkley Point C nuclear power station have drawn heavily on certain quarries). These factors create uncertainty about scaling up crushed rock imports to Suffolk. Despite these challenges, imported crushed rock remains essential for Suffolk's construction needs, for example, major road schemes in Suffolk have historically used imported crushed rock for the road base and asphalt, rather than locally dug sand and gravel. Therefore, maintenance of the two rail-linked aggregate depots (at Ipswich and near Newmarket) and wharves in Suffolk is strategically important.

Marine Aggregates

2.7 Off the East Anglian coast, there are significant licensed resources of marine - dredged sand and gravel (Figure 3 shows the current areas being worked), however, market dynamics have meant that the vast majority of marine-dredged aggregates from this region are landed at wharves in the London area or elsewhere, and then often transported inland by rail. Suffolk's share of these landings has been relatively small (365,858 tonnes landed out of 3,103,817 tonnes extracted in 2024).

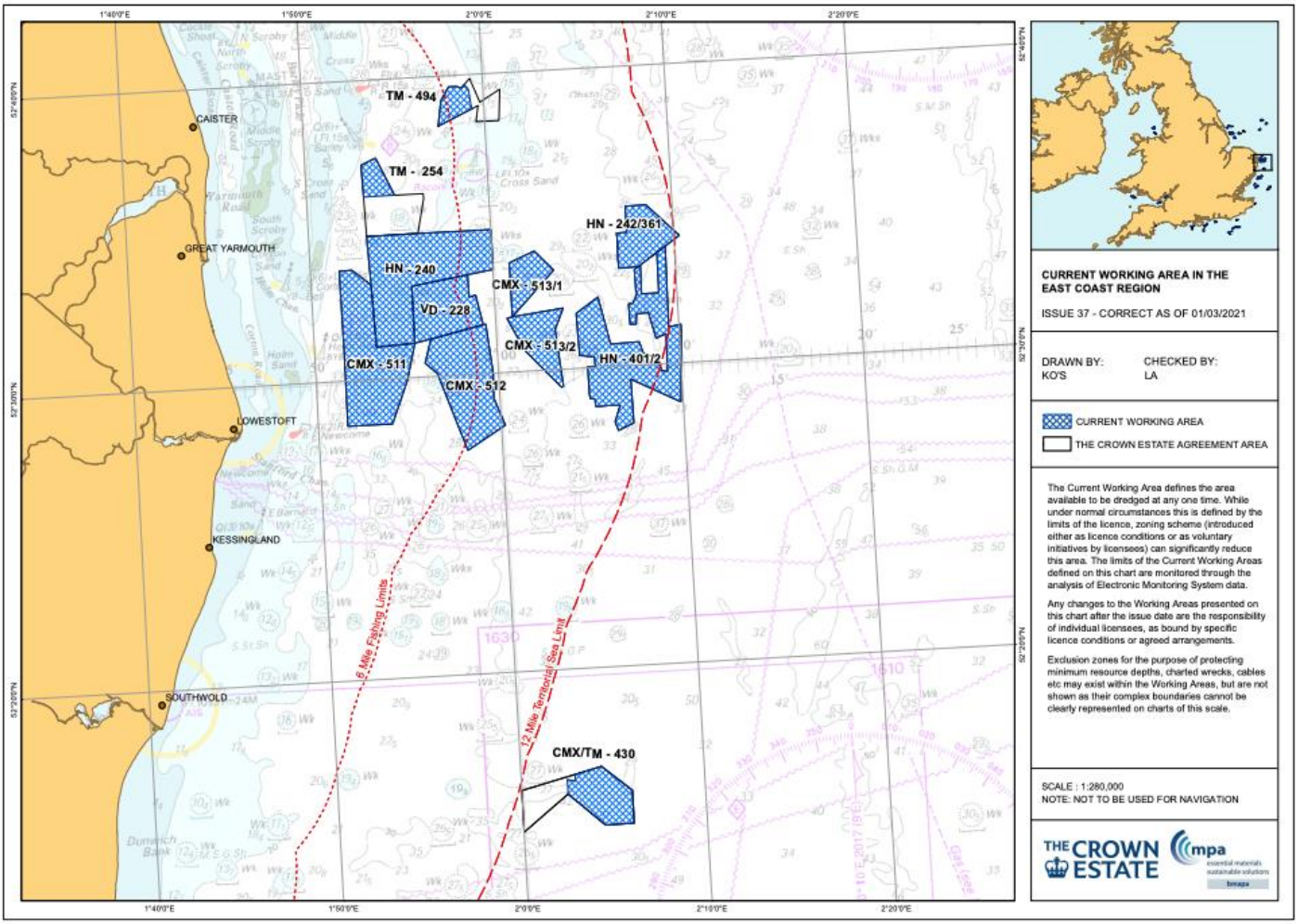

Figure 3: Marine Aggregate Working Area in the East Coast Region, Crown Estate, 2021

2.8 Wharf activity is showing an increasing trend (see Figure 6), with about 0.37 Mt of marine sand and gravel landed at Suffolk wharves in 2024. This material contributes to the overall supply and provides additional flexibility, for example, it can help meet sand and gravel demand if local quarries face shortfalls. However, reliance on marine aggregate is limited by the capacity of Suffolk's wharves (currently two, at Ipswich and Lowestoft) and by competition from larger markets drawing most of the dredged tonnage.

Aggregate Imports and Exports

2.9 The BGS Aggregate Minerals Survey 2023 provides the most recent detailed evidence on the movement of aggregates into and out of Suffolk. This confirms that Suffolk is closely integrated with the wider East of England aggregates market.

Land-won sand and gravel – exports from Suffolk

2.10 AMS 2023 indicates that around 55% of land-won sand and gravel produced in Suffolk is consumed within the county, with the remainder exported to other areas. The principal destinations identified are:

- Suffolk: c55% of Suffolk's land-won sand and gravel production is consumed locally;
- Norfolk: around 5% of Suffolk production;
- Elsewhere in the East of England / unknown within the region: around 30%;
- Other destinations (including Bedfordshire and unassigned locations): the balance.

2.11 Overall, Suffolk accounts for about 8% of all land-won sand and gravel production in the East of England region (with Essex (30%) and Cambridgeshire (28%) producing the most), illustrating its continuing contribution to regional supply as well as meeting local needs.

Sand and gravel – imports to Suffolk

2.12 For total sand and gravel consumption in Suffolk (including marine-won material), AMS 2023 suggests that:

- around two-thirds (c66%) of the sand and gravel consumed in Suffolk originates from within Suffolk; and
- the remaining c34% is imported, mainly from Essex (c16%), Cambridgeshire (c6%), Norfolk (c6%) and Central Bedfordshire (c1%).

2.13 This pattern reflects Suffolk's role as a broadly self-sufficient but interconnected sand and gravel producer - in most years Suffolk meets the majority of its own sand and gravel demand, exports some material to neighbouring authorities and relies on them to supplement its own supply when needed.

Crushed rock imports

2.14 AMS 2023 confirms that Suffolk remains entirely dependent on imports for crushed rock, with no indigenous hard-rock resource. Approximately 415,000 tonnes of crushed rock were consumed in Suffolk in 2023, all imported via the county's safeguarded rail depots and wharves. Just over half of this (around 54%) originated

from beyond England and Wales (e.g. seaborne imports from Norway), with the remainder supplied predominantly from:

- Leicestershire (c24%);
- Peak District National Park (c14%);
- Derbyshire (c5%); and
- Lincolnshire (c4%).

Overall import/export supply balance

2.15 Table 2 below summarises the import/export balance in 2023

Table 2: Consumption (Cons'n) of primary aggregates v sales in Suffolk in 2023 (Sales in 000 tonnes)

Land-won sand and gravel			**Marine won sand and Gravel**			**Crushed Rock**			**Total Primary Aggregates**		
Sales	*Cons'n*	*Sales as % of cons'n*	*Sales*	*Cons'n*	*Sales as % of cons'n*	*Sales*	*Cons'n*	*Sales as % of cons'n*	*Sales*	*Cons'n*	*Sales as % of cons'n*
855	610	100%	245	245	100%	0	415	0%	1,100	1,270	87%

2.16 Taken together, the AMS 2023 data shows that Suffolk is:

- broadly self-sufficient in sand and gravel in most years, whilst exporting a proportion of its output to other East of England authorities; and
- wholly reliant on imports for crushed rock, sourced from a mix of English regions and overseas via rail and sea.

2.17 The above suggests a need to continue planning positively both for an adequate local land-won sand and gravel reserves and for the long-term safeguarding of import infrastructure (rail depots and wharves), recognising the strategic cross-boundary nature of Suffolk's aggregate supply.

Sand and Gravel Sales Trends

2.18 Annual sales of land-won sand and gravel in Suffolk have fluctuated over the last 10 to 15 years but generally ranged between about 0.9 Mt and 1.3 Mt. As detailed in Section 5, sales peaked in 2017 to 2018 at around 1.22 to 1.28 Mt, then dipped below

0.9 Mt in 2019 amid economic uncertainties. The early 2020s saw a rebound (up to 1.17 Mt in 2021) followed by another decline (to 0.86 Mt in 2023 and 0.74 Mt in 2024). Despite year-to-year variations, the long-term trend appears approximately flat to slightly declining with the 10-year average sales reducing from c1.08 Mt (as of 2022) to c1.03 Mt in 2024. At the same time, permitted reserves of sand and gravel have steadily declined as existing sites are worked, this is despite planning permission being granted for 405,000 tonnes of additional reserves at Folly Farm in 2024. Suffolk's total permitted reserves fell from about 13.1 Mt in 2015 to 8.91 Mt by the end of 2024 (see Section 5).

Demand Indicators

2.19 House building is often used as a proxy for aggregate demand, since construction of new housing consumes significant quantities of aggregate (in foundations, concrete, roads, etc.). Suffolk's housing delivery has been strong in recent years, for example, 3,477 net additional dwellings were delivered in 2021 to 2022 across the county, exceeding the combined local plan target of c3,162 dwellings per annum. In 2023/24, Suffolk authorities collectively delivered around 100% of their housing targets (indicating sustained high construction activity). Looking forward, housing needs are expected to increase significantly - under the latest standard methodology, Suffolk's annual housing requirement could increase by c64% (from c3,100 to c5,050 homes per year). If housing construction moves toward that higher figure in the coming years, demand for aggregates (for concrete, mortar, etc.) will likewise increase substantially.

2.20 Apart from housing, there are a number of major infrastructure projects in or near Suffolk that influence aggregate demand. The most notable is the Sizewell C twin-reactor nuclear power station on the Suffolk coast, which received development consent in July 2022 and began early construction works in 2024. Sizewell C requires very large quantities of bulk fill and concrete aggregates. Information from the project's examination indicates that much of the general fill will be sourced on-site (from materials excavated during construction), but high-grade aggregates (e.g. crushed limestone for concrete and granite for road surfacing) will need to be imported

to Suffolk by road, rail, or sea. It had been suggested that some lower-specification aggregates could be obtained from Suffolk or neighbouring counties[4].

2.21 Other planned infrastructure includes improvements to the A12 trunk road and other highway network upgrades, flood defence works, and energy projects. Historically, major road schemes in Suffolk have relied on imported crushed rock (brought by road from the Midlands or by rail) rather than local sand and gravel. This trend is likely to continue for upcoming projects, meaning spikes in demand will mainly affect import volumes.

2.22 Overall, Suffolk's population is growing, and is projected to continue rising steadily over the next two decades (with growth focused around Ipswich and other key towns). Economic growth initiatives in the region (e.g. Suffolk's Inclusive Growth strategy) and the transition to more sustainable construction may also influence the types and quantities of aggregates required, though these factors are harder to quantify.

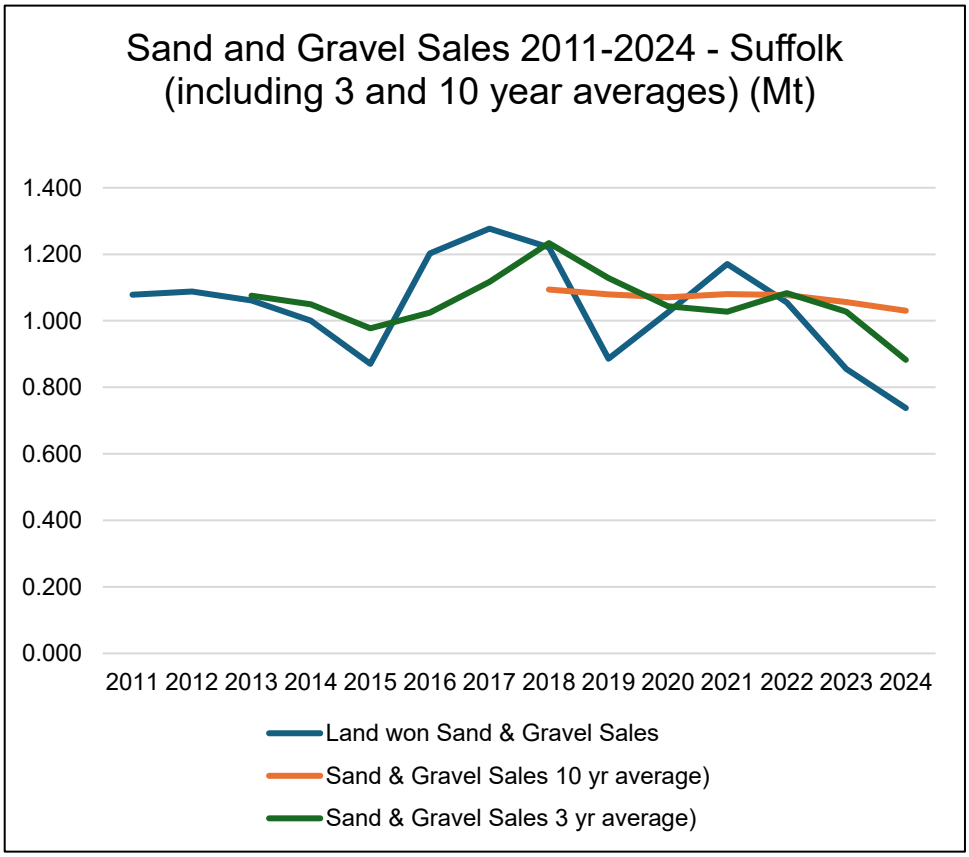

Figure 4: Land-won Sand and Gravel Sales in Suffolk (2011 - 2024)

[4] Sizewell C Environmental Statement – Volume 2, Chapter 8: Conventional Waste Management and Material Resources, 2020

2.23 Figure 4 illustrates the fluctuating but overall steady trend of land-won sand and gravel sales in Suffolk. Despite year-to-year changes, the long-run average has remained around 1 million tonnes per year, although recent years (2023 - 2024) show a distinct dip below this level.

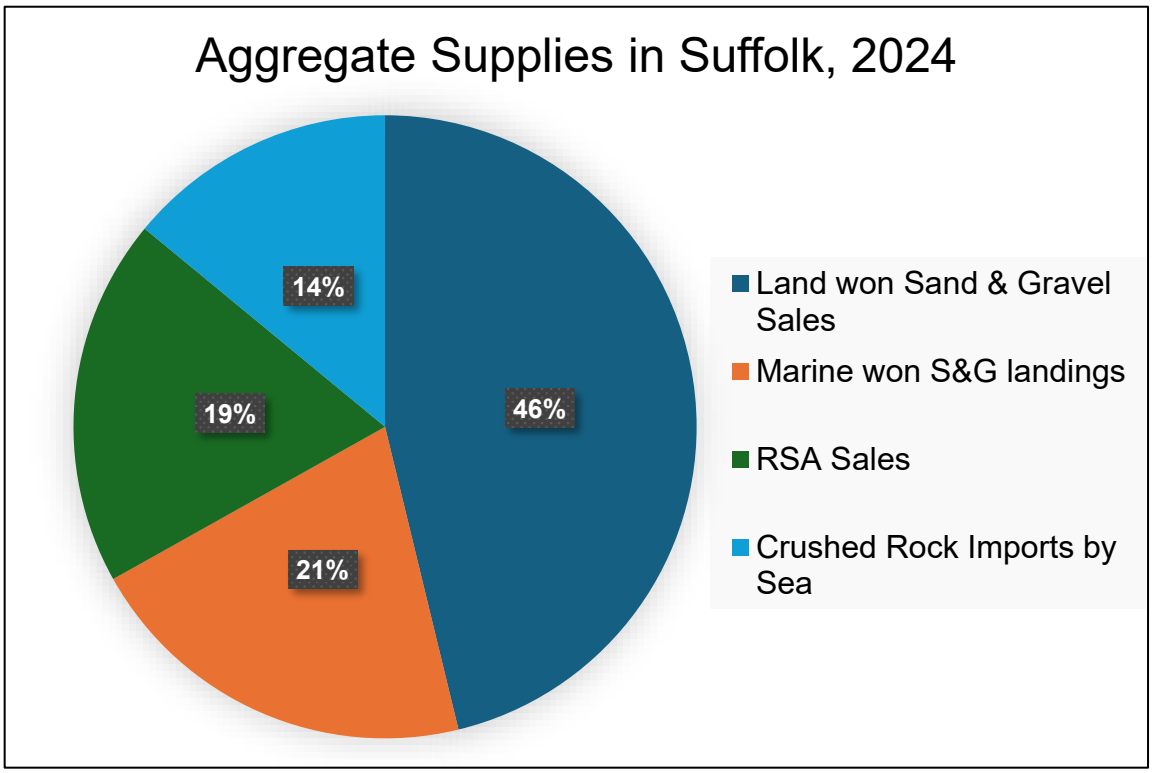

Figure 5: Total Aggregate Supplies in Suffolk

2.24 Figure 5 provides an overview of the total aggregates sales in Suffolk in 2024. It highlights the relative contributions of local quarries versus imports and alternative materials.

3. Recycled and Secondary Aggregates in Suffolk

Recycled Aggregates

3.1 Suffolk benefits from an extensive network of facilities that produce recycled aggregates from construction, demolition, and excavation (CD&E) waste. As of 2024, approximately 30 sites across the county are permitted to process inert waste into recycled aggregate. These include both standalone recycling centres and some active quarries or landfill sites that incorporate aggregate recycling operations. Collectively, they handle materials such as crushed concrete, brick rubble, reclaimed asphalt planings, and soils, turning suitable waste into usable aggregate products (often after screening and crushing).

3.2 According to Environment Agency Waste Data Interrogator records, recycled aggregate production in 2024 is estimated to be in the order of 300,000 tonnes. In 2023, it is estimated that about 345,000 tonnes were produced. The decline in 2024 may be due to a general slowdown in the construction industry (data shows a decline in housing delivery) resulting in less inert waste being produced that could be converted to aggregate.

3.3 More generally, the Landfill Tax, introduced and steadily increased over the last 20 years, has been a key driver in boosting recycled aggregate production by making disposal more costly and recycling more economically attractive. As a result, recycled and secondary materials now form a notable part of Suffolk's aggregate supply, improving resource efficiency and sustainability in construction.

3.4 All permitted recycled aggregate facilities in Suffolk are safeguarded under local planning policy. The Suffolk Minerals and Waste Local Plan (2020) includes policies to protect existing waste management sites (including CD&E recycling sites) from being lost to other developments (Policy WP18). This safeguarding recognises that maintaining capacity for aggregate recycling is important for reducing reliance on primary extraction.

3.5 An example of recycled aggregate production and use concerns the Sizewell C development, where it is understood that over 15,000 tonnes of crushed concrete from the demolition of the Sizewell A turbine hall are being reused as recycled aggregate as part of the Sizewell C development. The material has been processed and certified to the WRAP Quality Protocol and is being used as sub-base for

foundation platforms on the new nuclear power station site, significantly reducing the need for newly quarried aggregates, cutting HGV movements through East Suffolk and avoiding associated carbon emissions. This example shows how major infrastructure projects in Suffolk can help deliver the county's objectives on recycled and secondary aggregates by maximising the re-use of construction and demolition materials.

Secondary Aggregates (Industrial By-products and Alternative Materials)

3.6 In addition to recycled construction materials, Suffolk also produces secondary aggregates from certain industrial processes and natural alternative materials:

- One notable source is Incinerator Bottom Ash (IBA) from the Great Blakenham Energy-from-Waste (EfW) facility. This large plant (with a throughput capacity of c295,000 tonnes of municipal waste per annum) generates substantial ash residue. After suitable processing (ageing, metal extraction, grading), IBA can be used as a secondary aggregate in construction (for example, as fill or in road sub-base). The EfW facility typically produces 50,000 tpa of IBA that is potentially available for use as aggregate. This material, once processed, is generally known as Incinerator Bottom Ash Aggregate (IBAA). Its utilisation in Suffolk contributes to a circular economy approach by repurposing waste from energy production into construction material.
- Suffolk also has a small scale of chalk extraction which provides a type of secondary aggregate. At Barton Mills Chalk Quarry, a soft chalk is quarried primarily for agricultural lime and engineering fill. In 2024, Barton Mills produced chalk for aggregate uses. While chalk is not suitable for high-strength applications, it can be used in lower-grade works and soil stabilisation. The remaining chalk reserves and sales are not reported for reasons of confidentiality. Chalk is not included in the county's landbank calculations, as it is not used as a primary aggregate for concrete/asphalt and is considered a separate resource.
- Other potential secondary aggregates, such as blast furnace slag or colliery spoil, are not produced in Suffolk (these arise from heavy industrial or mining processes not present locally). However, Suffolk can import such materials if needed for specific purposes (e.g. slag from steelworks as a cement substitute), though this is on a small scale if at all.

3.7 All these secondary aggregate sources, while modest in tonnage, contribute to reducing the demand for land-won sand and gravel. Their use is in line with sustainable construction principles. As with recycling sites, facilities producing secondary aggregates (like the EfW plant's ash processing and the chalk quarry) are safeguarded by local plan policies to ensure their capacity is not diminished.

Conclusion

3.8 Recycled and secondary aggregates continue to supplement primary aggregates in Suffolk. They improve sustainability by reusing waste and by-products, but due to quality and availability limitations, they do not eliminate the need for primary land-won aggregates. Recycled aggregates are typically used in lower-specification applications (e.g. road sub-base, general fill) and cannot fully replace high-quality sand, gravel, or rock in structural concrete or asphalt. Nonetheless, their contribution is important and helps extend the life of natural reserves while diverting material from landfill.

4. Imported Aggregates: Rail Depots and Wharves

4.1 Suffolk's ability to import aggregates (both sand and gravel from other regions and crushed rock) relies on its transportation infrastructure comprised primarily of rail-linked depots and port (wharf) facilities. These sites serve as hubs where large volumes of aggregate can be brought in by train or ship, stockpiled, and distributed locally by road. They are critical for meeting the county's demand, given the lack of local hard rock and the potential shortfall in land-won sand and gravel for future needs.

Aggregates Rail Depots in Suffolk

4.2 Suffolk has four rail depots handling aggregates:

- Barham Railhead
- Bury St Edmunds Railhead (inactive)[5]
- Gazeley Railhead (Kentford/Higham)
- West Bank Terminal, Ipswich

4.3 These depots typically receive train deliveries of crushed limestone or granite and dispatch the material by road to local concrete plants, asphalt plants, and construction sites. Because sales from rail depots are not individually surveyed (the material is accounted for as part of consumption, not 'extracted' locally), exact annual throughputs are not published. However, the total crushed rock consumption in Suffolk (mostly via these depots) was about 0.415 Mt in 2023[6]. It is likely a similar order of magnitude in 2024 (somewhat lower or higher depending on project demand).

4.4 Rail-imported aggregate fluctuates in response to local demand and is affected by the closure of quarries in the East of England (which increases reliance on distant sources). Suffolk rail depots appear to have additional capacity if needed as they are not utilised at maximum throughput at present. This means they could accommodate higher volumes in the future, which is important if major projects (e.g. highway schemes) increase demand for imported rock. The presence of rail depots in Suffolk

[5] Railhead inactive – included in allocation for housing in the West Suffolk Local Plan

[6] Source: Aggregate minerals survey for Great Britain, 2023, BGS

significantly reduces the need to haul rock by road from distant quarries, mitigating lorry traffic, carbon emissions, and wear on roads.

4.5 The rail depots are safeguarded in the Suffolk Minerals and Waste Local Plan under Policy MP9 (Safeguarding of rail facilities). Maintaining these sites is strategically essential, as they ensure Suffolk can receive large imports of aggregate efficiently. Network Rail's freight capacity and schedules also play a role. Any increase in rail imports would require train path availability from the supplying regions.

4.6 It should be noted that sand and gravel can also be moved by rail, but currently Suffolk's rail facilities are used primarily for crushed rock. There is at least one rail-connected sand and gravel operation just beyond Suffolk (in Cambridgeshire) that exports by train, but within Suffolk no land-won aggregate is transported by rail as it's consumed locally or by exported by road.

Aggregates Wharves in Suffolk

4.7 Suffolk's coastline hosts three key aggregate wharf facilities:

- Cliff Quay Wharf (East Bank), Ipswich) - part of the Port of Ipswich on the River Orwell. This wharf imports marine dredged sand and gravel and crushed rock to supply the asphalt plant located at the wharf.
- West Bank Terminal, Ipswich – also part of the Port of Ipswich. This wharf handles marine-dredged sand and gravel and occasionally imported crushed rock by sea. Ipswich has storage and processing for marine aggregates and is rail-linked as well, providing inter-modal flexibility.
- North Quay Wharf at the Port of Lowestoft, receives armour stone for use in sea defences but can also receive marine aggregates.

4.8 In 2024, these wharves landed about 0.37 Mt of marine sand and gravel (dredged from offshore licenses). This was a slight increase from 2023 (0.332 Mt) based on Crown Estate reporting. The marine aggregate landed in Suffolk is typically used in the local concrete and construction market, and the tonnage, while modest, helps fulfil overall demand. Additionally, Suffolk's wharves handled approximately 0.224 Mt of imported crushed rock in 2024. This rock included seaborne imports from Norway delivered by ship to Ipswich, supplementing the rail-imported rock supply. The ability to bring in rock by sea provides another supply route, potentially important if rail

logistics become constrained. Operator feedback suggests that recent seaborne crushed rock imports via Ipswich have been driven predominantly by Sizewell C requirements which likely represents a project-driven peak rather than a long-term baseline.

4.9 Historically, Suffolk's share of regional marine aggregate landings was small, but the recent data shows a more meaningful contribution. For example, in 2022, around 0.44 Mt was landed (a peak in recent years). The fluctuations are influenced by local demand and dredger schedules. National and regional data indicate that the Thames Estuary and East Coast dredging areas produce millions of tonnes annually, most of which go to the Thames (London) market. In 2024, of the aggregate extracted, over 2.4 Mt was landed in the Thames estuary wharves compared to only c0.37 Mt in Suffolk. This emphasises that while Suffolk has access to marine aggregates, it competes with larger markets for the material, and shipping distances/costs play a role. Nonetheless, having operational wharves means Suffolk can take advantage of marine sources when economically viable.

4.10 The combined capacity of Suffolk's aggregate wharves is estimated at c0.4 Mt per annum (based on infrastructure and handling limits). In 2024 they operated near that level. If demand were to increase further (e.g., supplying a major project by sea), there might be options to expand capacity or operational hours[7], but any significant increase could require infrastructure investment or additional wharf space.

4.11 As with rail depots, the Suffolk Minerals and Waste Local Plan safeguards port facilities used for landing aggregates (Policy MP9). This ensures that valuable wharf space is protected from redevelopment that could otherwise displace aggregate import operations.

[7] Any extension to operating hours would be subject to consideration of impacts e.g. noise, on local amenity.

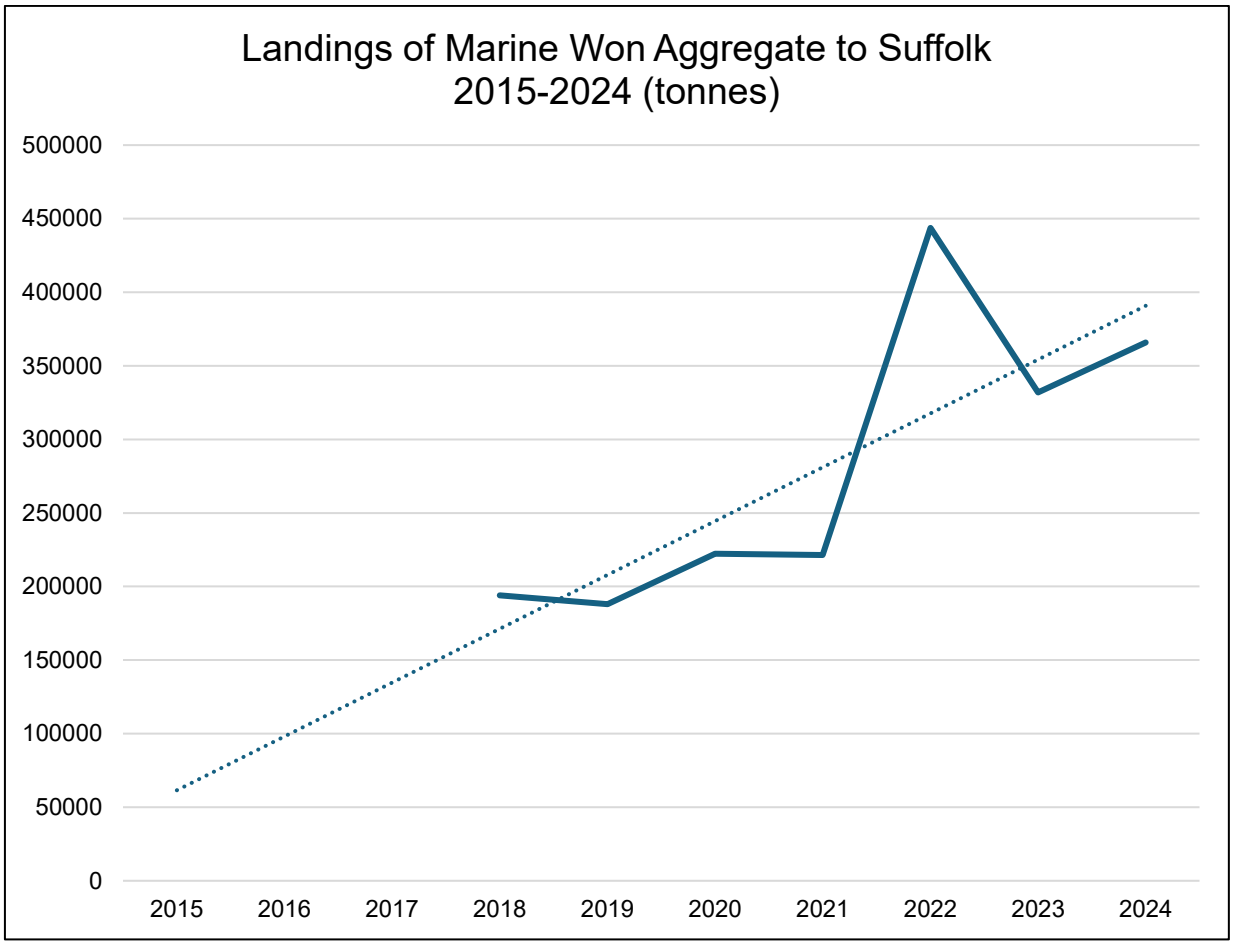

Figure 6: Marine-dredged Sand and Gravel Landings in Suffolk – 2015-2024 trend

4.12 Note that marine landings do not count toward Suffolk's landbank (which is solely a measure of land-won permitted reserves), but they are part of the consumption/supply picture. Also, 'imports by sea' of crushed rock are included in the crushed rock trend (Figure 7) rather than shown separately, since volumes have been relatively small and intermittent.

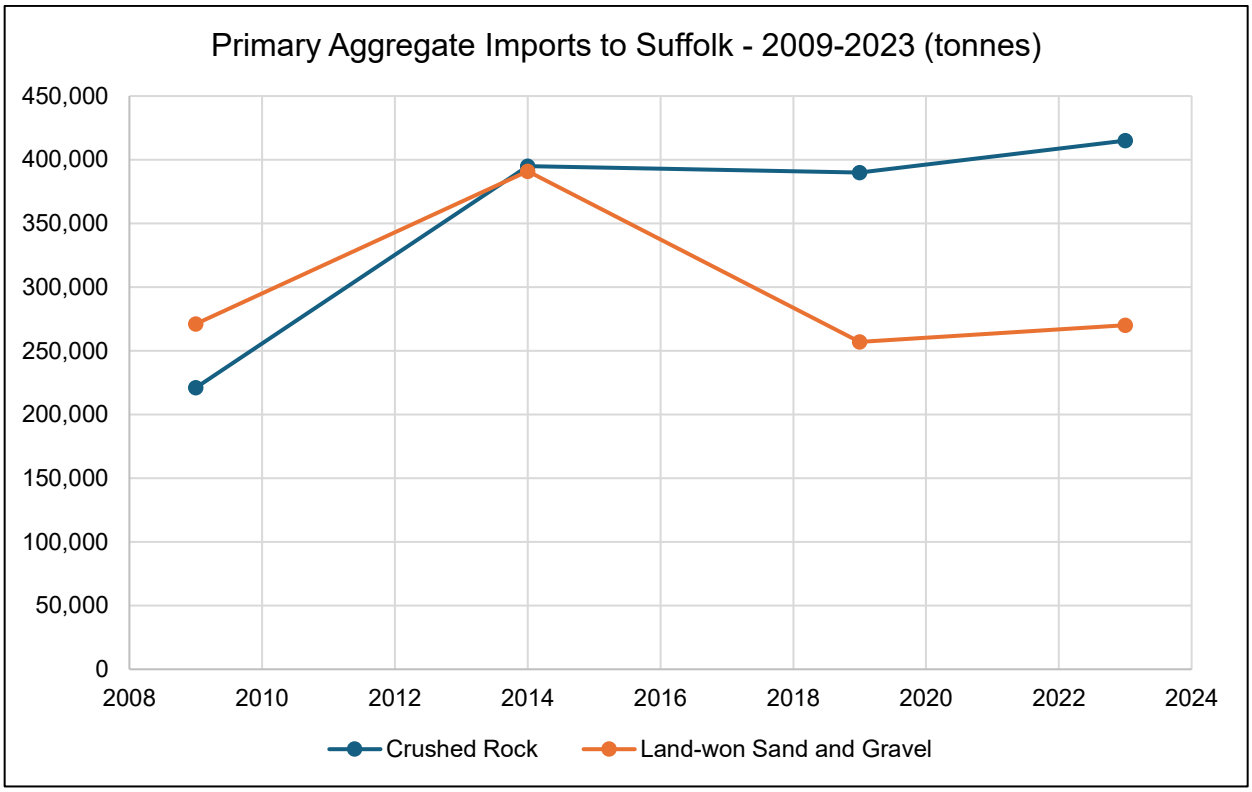

Figure 7: Primary Aggregate Imports to Suffolk 2009 to 2023

5. Provision of Land-won Sand and Gravel

Land-won Sales Trends

5.1 Sand and gravel are geologically widespread in Suffolk, and the county has a long history of extraction. The main resource is aggregate-bearing river terrace and glacial deposits that yield a mix of sand and gravel (used for concrete aggregate, asphalt, etc.), often referred to in this LAA collectively as 'sand and gravel' without distinguishing sub-types. (Suffolk does not report separate figures for sharp sand versus soft sand, consistent with East of England practice.)

5.2 Table 3 shows the recorded sales from Suffolk's quarries each year, along with the 10-year and 3-year rolling average sales where applicable. All figures are in million tonnes (Mt). The rolling averages are calculated up to and including the year in question.

Table 3: Annual sales of land-won sand and gravel from Suffolk quarries (2009 - 2024), with 10-year and 3-year average sales[8].

Year	Land-won Sand & Gravel Sales (Mt)	10-year Rolling Average (Mt)	3-year Rolling Average (Mt)
2009	1.037	*n/a*	*n/a*
2010	1.104	*n/a*	*n/a*
2011	1.078	*n/a*	1.073
2012	1.088	*n/a*	1.090
2013	1.061	*n/a*	1.076
2014	1.000	*n/a*	1.050
2015	0.871	*n/a*	0.977
2016	1.203	*n/a*	1.025
2017	1.277	*n/a*	1.117
2018	1.221	1.094	1.234
2019	0.886	1.079	1.128
2020	1.025	1.071	1.044
2021	1.171	1.080	1.027
2022	1.055	1.077	1.084
2023	0.855	1.056	1.027
2024	0.738	1.030	0.883

[8] Source: SCC Annual Aggregates Surveys

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5.3 As shown in Table 3, Suffolk's land-won sand and gravel sales have varied year by year, influenced by economic cycles (e.g., recession around 2009 - 2012, recovery in mid-2010s), major project schedules, and more recently the COVID-19 pandemic and its aftermath. Key points from the sales trend:

- Sales peaked in 2017 at about 1.277 Mt and were also high in 2018 (1.221 Mt). This corresponded with a period of strong construction activity regionally. After 2018, sales dropped sharply in 2019 to 0.886 Mt.
- The 2020 figure (1.025 Mt) shows a rebound despite the pandemic, with construction being one of the sectors that recovered quickly in late 2020, aided by infrastructure spending and a push on housing.
- 2021 saw further increase to 1.171 Mt, the highest in recent years. This likely reflected a catch-up of projects delayed from 2020 and a booming housing market that year.
- However, sales declined in 2022 to 1.055 Mt and more steeply in 2023 to 0.855 Mt. By 2024, sales fell again to 0.738 Mt - c19% below the 10-year average of 1.03 Mt/yr. The 2024 figure is the lowest in at least 15 years (the last time annual sales were in the 0.7 Mt range was the early 2000s (not shown in table)).
- The 10-year average has gradually declined from c1.08 Mt (as of the 2021 - 2022 LAA) to 1.03 Mt in 2024, due to lower recent numbers replacing higher older numbers in the calculation.
- The 3-year average (2022 - 2024) now stands at 0.883 Mt, which is also a decrease (-14% from the previous 3-year average). This indicates that the most recent years' production is significantly below the longer-term norm.

5.4 Despite the annual fluctuations, one observation is that Suffolk's land-won sales have a 'fairly steady' long-term trend of around 1 Mt per year. While there are peaks and troughs, the overall change over a decade is not dramatic until the noticeable downturn in 2023 - 2024. This recent dip may be due to a combination of factors: economic conditions (inflation, a temporary slowdown in construction in 2023), timing of local major projects, and potentially the beginnings of capacity constraints as several quarries near the end of their reserves.

5.5 In a regional context, Suffolk has been an important producer of sand and gravel in the East of England, usually able to meet its own needs and at times contributing to other areas. In years of strong production (e.g. 2017 - 2018), Suffolk quarries likely supplied material to neighbouring counties that had production shortfalls. Conversely, in lower production years, Suffolk has drawn in more from beyond the county. The next subsection on imports/exports provides further details on these inter-regional flows.

5.6 It is worth noting that earlier policy-based supply targets for Suffolk (such as sub-national apportionments in the 1990s and 2000s) were higher than current production levels. For example, Suffolk's old Minerals Local Plan (1990s) assumed 2.43 Mt/yr of sand and gravel, and the later Core Strategy in the 2000s used c1.62 - 1.73 Mt/yr as a guideline. These figures were never fully realised in actual sales, and current policy now simply uses the rolling average approach required by the NPPF (i.e. no fixed apportionment with the LAA's 10-year average becoming the provision rate).

5.7 In 2024, Suffolk's sales (0.738 Mt) were well below the current 10-year average (1.03 Mt), meaning production under-performed the assumed provision level. While one year's dip does not immediately threaten supply adequacy, it highlights the need to monitor whether this is an anomaly or the start of a persistent lower demand scenario.

Sand and Gravel Reserves and Landbank

5.8 As of 31 December 2024, Suffolk's permitted sand and gravel reserves were estimated at approximately 8.91 Mt. This is the total tonnage of sand and gravel remaining in the ground that has planning permission for extraction, across all active and inactive sites in the county. The 2024 reserve level represents a decrease from the end of 2023, when c9.54 Mt remained. Although new reserves of 405,000 tonnes were permitted, the decline is attributable to ongoing extraction depleting reserves at a faster rate.

5.9 Suffolk's permitted reserves have been on a declining trend for several years, as shown in Figure 8 below, however, in 2025 planning permission was granted for a substantial new reserve, and the implications of this will be considered in next year's LAA.

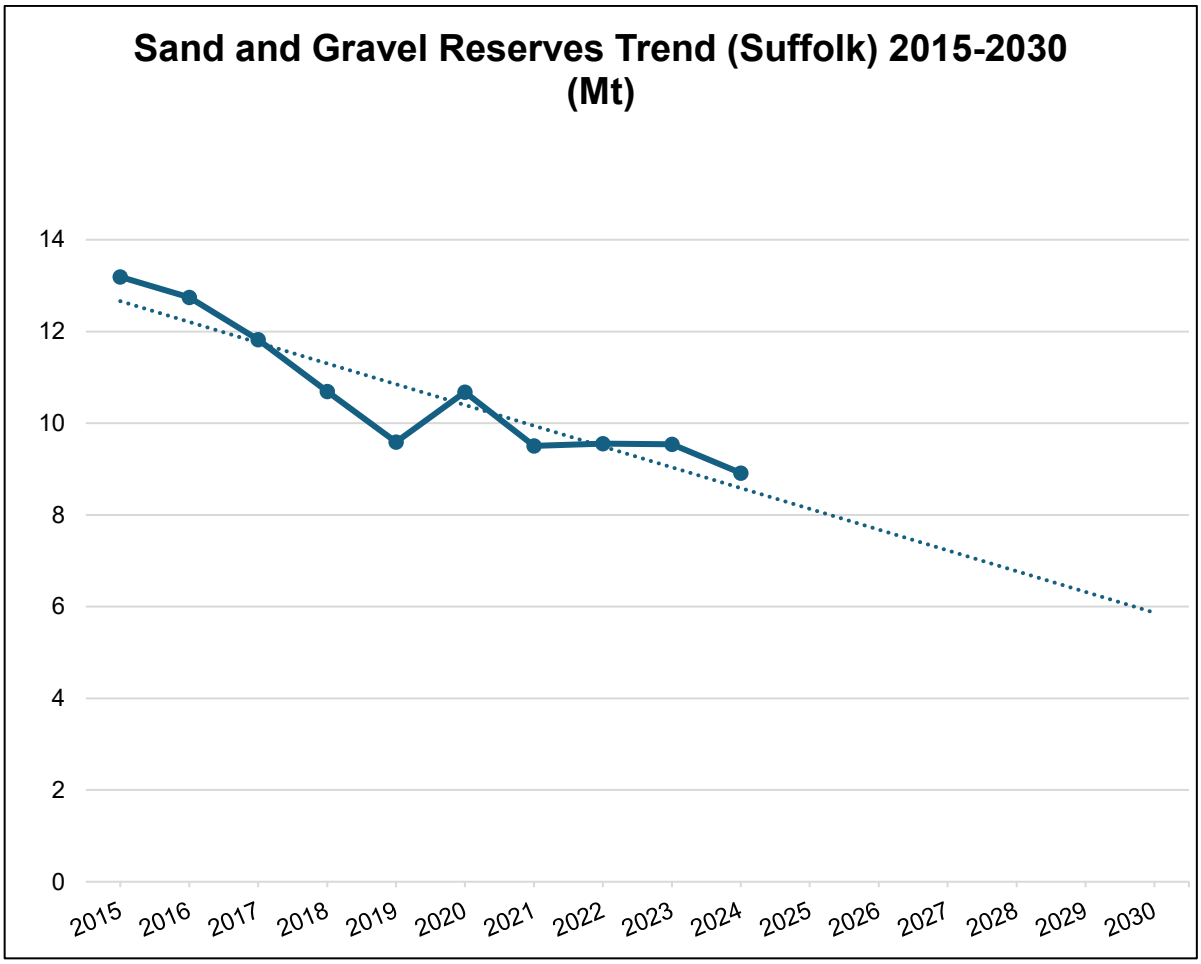


Figure 8: Sand and Gravel Permitted Reserves Trend (Suffolk, 2017 - 2030)

5.10 The Suffolk Minerals and Waste Local Plan (2020) allocated several new sand and gravel sites (with an estimated total resource of 13.77 Mt). The Suffolk MWLP estimated that c11.18 Mt of the allocated reserves might actually be worked by 2036 (the end of the current Plan period), leaving about 2.59 Mt unexploited by that date.

5.11 The Plan's allocated sites, would replenish reserves (as they have in the past) and the rate at which they are brought forward affects how well the landbank in Suffolk is maintained (see below).

Landbank Calculation

5.12 The landbank is a key indicator defined as the number of years of production that the remaining permitted reserves would allow, based on a given annual demand rate. National policy requires at least a 7-year landbank for sand and gravel to be maintained. For LAA purposes, the annual demand is typically the rolling 10-year average of sales (unless there are local circumstances to justify using a different figure).

5.13 At the end of 2024, Suffolk's landbank was calculated as follows:

- Landbank (years) = Permitted Reserves / Annual Provision Rate.
- Using the 10-year average sales up to 2024 (c1.03 Mt/yr) as the provision rate (APR), the landbank = 8.91 Mt / 1.03 Mt/yr = c8.7 years.

5.14 **Suffolk's landbank was therefore about 8.7 years in December 2024**, which exceeds the 7-year minimum recommended in the NPPF. This is a slight decline from 9.0 years a year earlier on a 10-year average sales of c1.06 Mt. The small decline is due to new reserves being permitted and a slight decrease in the 10 year sales average.

5.15 Table 4 below presents the recent landbank levels in Suffolk for context.

Table 4: Suffolk Sand and Gravel Landbank, 2018 - 2024

Year	Landbank (years)[9]	Source
2018	9.7 years	Suffolk LAA (2018 data), Apr 2019
2020	9.8 years	Suffolk LAA (2019 - 2020 data), Oct 2021
2022	8.9 years	Suffolk LAA (2021 - 2022 data), Nov 2024
2023	9.0 years	Suffolk LAA (2023 data), Feb 2026
2024	**8.7 years**	*This LAA (2024 data)*

5.16 As shown in Table 4 (and Figure 9 below), Suffolk's landbank has been on a downward trend, from nearly 10 years in 2018 - 2020 to below 9 years in 2024.

5.17 It is important to note that the landbank can be misleading if considered in isolation. While 8.7 years is above the minimum, it masks that a few large sites hold a significant share of those reserves. If any of those sites face delays, reduced output, or do not fully materialise (for example, one inactive site's reserves might never be worked due to potential sterilisation by development), the effective available landbank could be lower. Suffolk's reserves are concentrated such that the resilience of supply is not simply about the total tonnage, but also the number of active sites and their geographic spread.

5.18 Figure 9 below illustrates the landbank trajectory. It shows historical landbank figures and a forward projection against the 7-year benchmark. While the landbank

[9] Landbank calculated as permitted reserves divided by 10-year average sales in each year

decreased slightly in 2024, it is known that significant new reserves were permitted in 2025 and so next year's LAA is likely to report a healthier picture.

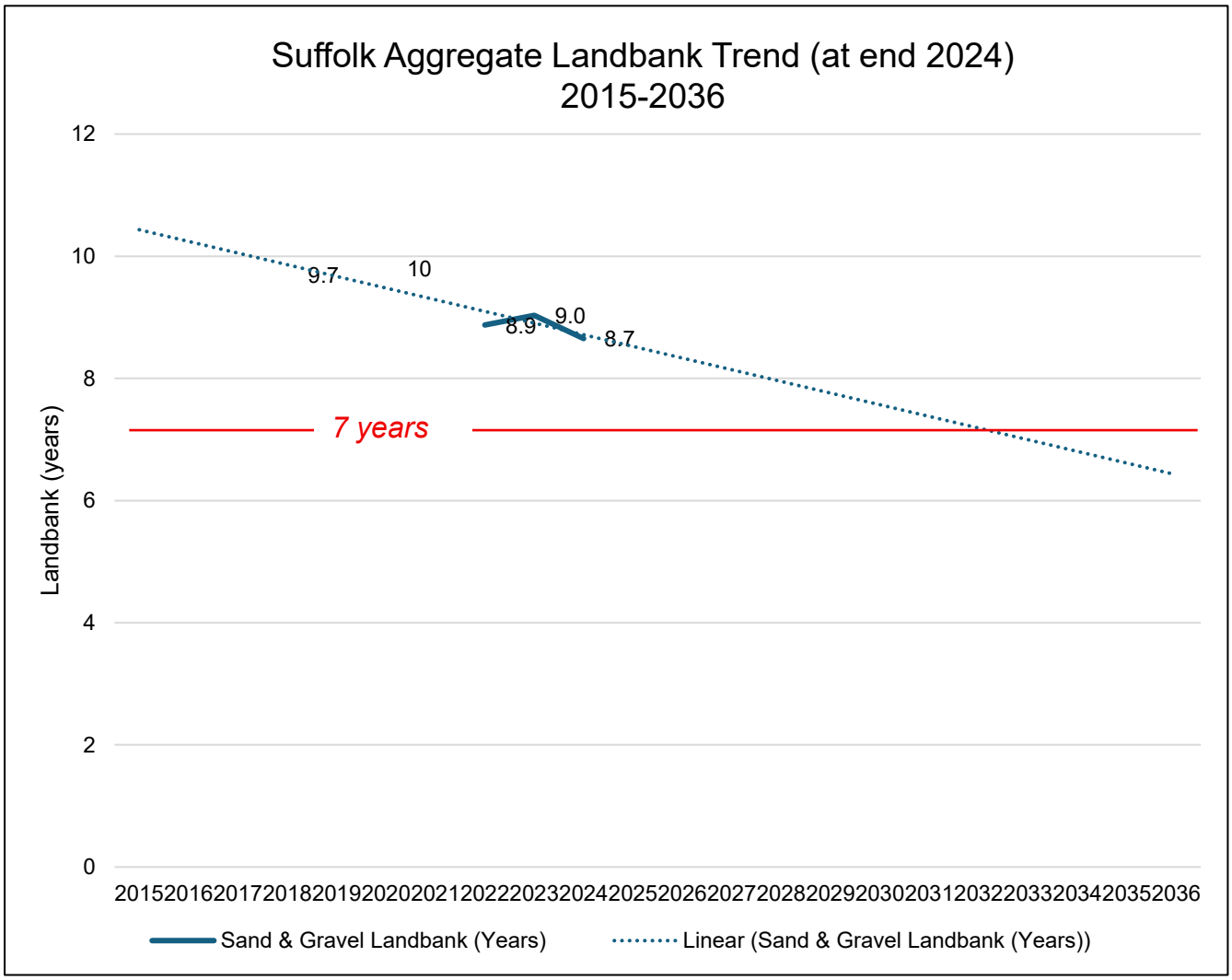


Figure 9: Suffolk Aggregate Landbank Trend 2015 - 2036

Provision to 2036: Supply Balance and Shortfall

5.19 The current Suffolk Minerals and Waste Local Plan runs until 2036. By that time (12 years from end-2024), the county will need sufficient aggregate supply to meet demand. Using the established Aggregate Provision Rate (APR) of c1.03 Mt/year (10-year average sales) as a baseline forecast, Suffolk's total demand for land-won sand and gravel over the period 2025 to 2036 would be on the order of 12.36 Mt (1.03 Mt × 12 years).

5.20 Given 8.91 Mt of reserves were permitted at the end of 2024, a simple projection suggests a shortfall of about 3.45 Mt by 2036 if no new reserves come online (because 8.91 Mt will be produced and exhausted, leaving that unmet demand). The

exact number can vary with updated demand figures. The shortfall has been derived using the following calculation:

- Required from 2025 to 2036 = 1.030 Mt/yr × 12 = 12.36 Mt.
- Reserves available = 8.91 Mt.
- Shortfall = 12.36 - 8.91 = 3.45 Mt (which is equivalent to about 3.35 years of supply at 1.03 Mt/yr).

5.21 This means that on current trajectory, Suffolk would run out of permitted sand and gravel approximately 3.5 years before 2036 (sometime during 2032) unless new sources are permitted.

5.22 However, the Plan does identify new sites (allocated sites totalling c13.77 Mt) and while some allocations have been permitted and worked others remain undeveloped.

5.23 The LAA analysis in 2021-22 concluded that after accounting for likely extraction from allocations, the shortfall would reduce to about 2.5 Mt. That essentially assumed c8.68 Mt (out of 11.18 Mt) would be produced by 2036, leaving a 2.5 Mt gap

5.24 In summary, based on current permitted reserves alone, while Suffolk currently faces a shortfall in meeting aggregate needs to 2036, if allocated sites are developed in a timely manner, the shortfall could be largely or entirely mitigated. The situation will depend on industry bringing forward planning applications, the outcomes of those applications, and the pace of extraction if permitted.

5.25 The implication for planning is that Suffolk will need to permit additional reserves (those allocated in the plan, or other windfall sites if necessary) before 2030 to maintain a 7-year landbank and minimise the risk of supply disruptions. It also underlines the importance of alternative supply options e.g. if new quarries are delayed or insufficient, Suffolk may need to rely more heavily on imports (marine or land-based) and maximise recycled aggregate use to bridge any gap.

5.26 The Supply Balance can be summarised as follows:

- Landbank is adequate in the near term, but trending downward.
- Without intervention, the current trend is that the landbank falls below 7 years around 2033.

- Utilising allocated sites could extend supply through 2036, but their delivery is crucial. There remains an element of risk/uncertainty as any slippage in delivering new reserves or any spike in demand could create a shortfall. Options to address a shortfall include:
    - permitting additional reserves (beyond current allocations, if needed),
    - increasing imports from other areas, and
    - further promoting recycled/secondary aggregate usage.

5.27 Suffolk County Council will continue to monitor this balance through annual LAAs and liaise with the aggregate industry. As it stands the data does not suggest the need for an immediate plan review especially as aggregate demand associated with the Sizewell C project will be met by imports and on-site materials. Having said that, a review of the Plan is needed to meet the requirement for reviewing local plans within five years of their adoption. Furthermore, the Plan will need to be updated in accordance with the recent reforms to plan making and imminent changes to national planning policy.

Future Demand Growth and Uplift Scenarios

5.28 In line with national policy (NPPF 2024 para 226) and guidance, Section 7.0 of this LAA considers potential demand uplift scenarios as 'other relevant local information' alongside the standard 10-year sales average. Two broad scenario sets are examined:

- a Medium Growth scenario (+10% and +20% above the baseline Annual Provision Rate) and
- a High Growth scenario (+30% and +50% above baseline).

5.29 These percentage uplifts are applied to the 10-year average sales of c1.03 Mt/yr (2015 - 2024) to yield adjusted provision rates (APR), reflecting possible increases in future aggregates demand due to higher housing delivery, infrastructure projects and economic growth.

5.30 The Medium 10% and Medium 20% options correspond to APRs of approximately 1.16 Mt/yr and 1.27 Mt/yr respectively. The High 30% and High 50% options assume APRs of approximately 1.37 Mt/yr and 1.58 Mt/yr. These scenarios are presented as neutral 'what-if' alternatives to stress-test the landbank and supply - demand balance.

On this basis they are not proposed targets, but illustrate how a steady and adequate supply could be affected if future demand significantly exceeds recent trends.

5.31 Each uplift scenario is based on Suffolk's growth context and consistent with Planning Practice Guidance (PPG) and POS/MPA guidance on LAAs. The moderate +10 to 20% uplifts align with evidence of rising local demand, for example, Suffolk's housing targets are set to increase substantially (national method indicates c64% jump) and there are planned infrastructure upgrades (e.g. improvements to the A12 corridor) that would require aggregates.

5.32 A 10% increase (APR c1.16 Mt) represents a 'business-as-usual plus' case, factoring in a gentle recovery from recent low sales (2023 saw c0.86 Mt after a post-Covid dip) and a slight increase in construction activity.

5.33 A 20% uplift (APR c1.27 Mt) reflects more pronounced growth, in line with meeting higher housing delivery ambitions and moderate infrastructure investment.

5.34 A 30% uplift (APR c1.37 Mt) might occur if Suffolk approaches its full new housing requirement (c5,000 homes/year) and a major infrastructure project like Sizewell C commenced in the same period.

5.35 The extreme 50% uplift (APR c1.58 Mt) is a worst-case peak where housing, infrastructure (e.g. Sizewell C, Freeport East expansions, major road schemes) and economic growth all converge to push annual aggregate need to approximately half again the recent level.

5.36 The high-demand scenarios, while unlikely to sustain long-term, provide an upper limit of credible demand and serve as a precautionary sensitivity test.

5.37 By including these alternative scenarios, the LAA demonstrates it has considered potential higher demand futures in accordance with PPG. The uplifted rates provide a qualitative forecast of how Suffolk's aggregate supply requirements might change if growth outpaces the past decade, ensuring that policy-makers are aware of the possible need for earlier intervention (e.g. additional reserves or capacity) to maintain the required landbank.

5.38 All scenarios retain the baseline 10-year average (1.03 Mt/yr) as the principal indicator of provision, and the uplift options are presented equally without preference. They simply illustrate the sensitivity of the supply-demand balance to different growth assumptions. In practice, if demand does begin to trend above the baseline, the

Council can use this analysis to justify timely actions (such as accelerating site allocations or permissions) to secure a steady and adequate supply of aggregates, consistent with NPPF requirements.

6. Asphalt and Concrete Plants in Suffolk

6.1 Aggregates are not consumed only as bulk materials, a significant portion is used in the manufacture of value-added products like asphalt (road surfacing materials) and concrete (for building and civil engineering). Suffolk hosts a number of these manufacturing facilities, which effectively convert primary aggregates (and imported cement or bitumen) into construction end-products. The presence and capacity of these plants are integral to the county's construction supply chain.

Asphalt Plants

6.2 In 2024, there were three main asphalt production plants operating in Suffolk:

- Cavenham Asphalt Plant - operated by Breedon, located at Cavenham (near a sand and gravel quarry in West Suffolk).
- Ipswich (Cliff Quay) Asphalt Plant - operated by Tarmac, located at the Ipswich port/industrial area.
- Gazeley/Kentford Asphalt Plant - near the western border of Suffolk, serving the Newmarket/Bury St Edmunds area.

6.3 All asphalt plants in Suffolk exclusively use imported crushed rock aggregate, since hot asphalt requires high-strength stone (with suitable polished stone value) which is not available from local sand and gravel. These plants mix the imported rock (typically granite or hard limestone) with bitumen to produce asphalt concrete for roads. The crushed rock is supplied either via the rail depots or by HGV deliveries from railheads/ports beyond Suffolk.

6.4 For example, the Ipswich asphalt plant likely receives aggregate from the Ipswich rail depot or wharf, while the others may be supplied by rail-fed stockpiles or long-distance trucking from Midlands quarries. All three asphalt plants reportedly have spare capacity to increase output if demand rises as they are likely not running 24/7 at full output, meaning they could scale up (e.g. to support major highway resurfacing projects) provided aggregate supply is available.

Concrete Batching Plants

6.5 There were thirteen static ready-mixed concrete plants in Suffolk in 2024. These are located at or near:

- Several active sand and gravel quarries (many quarry sites have an on-site batching plant to use their own aggregate for concrete).
- Industrial estates in towns (e.g. Ipswich, Lowestoft, Bury St Edmunds) where they can serve local construction markets.
- Along transport corridors (to facilitate easy delivery of raw materials and dispatch of concrete trucks).

6.6 Concrete plants typically use a mix of local sand and gravel, imported cement, and water to produce ready-mix concrete. In Suffolk, a high proportion of the aggregate used in concrete is land-won material from local quarries and maintaining this supply helps ensure ongoing local production of concrete. Some concrete mixes can incorporate crushed rock or recycled aggregates as a portion of the aggregate blend, but overall Suffolk's ready-mix industry relies on the county's sand and gravel. Cement is imported (there are no cement works in Suffolk). A few plants may also use GGBS or PFA (by-product cement replacements) imported from beyond the county.

6.7 The geographic spread of the 13 concrete plants ensures that the main growth areas and towns in Suffolk have local supply of concrete without excessive transport distances. As with asphalt, these plants usually have additional capacity to ramp up production as needed for large projects or peak construction periods.

6.8 Both asphalt and concrete production sites are safeguarded by policy MP9 in the local plan, which protects facilities for the manufacture of concrete and asphalt (as well as recycled aggregate materials). This policy recognises that losing such a facility (e.g. to redevelopment) could create supply bottlenecks or force longer haul distances for products.

6.9 In summary, Suffolk's network of 3 asphalt plants and 13 concrete batching plants in 2024 was sufficient to meet local construction demands. They are strategically co-located near raw material sources and markets. Asphalt production in Suffolk underscores the importance of imported crushed rock, while concrete production highlights the need for continued local sand and gravel availability. The Council's safeguarding policies help ensure these plants remain available to support planned development and infrastructure projects.

Key Findings - Asphalt and Concrete

6.10 Asphalt production in Suffolk relies entirely on imported rock, emphasising the importance of the county's rail and wharf links to external aggregate sources. Concrete production uses a high proportion of locally - won sand and gravel, thus a decline in local aggregate supply could directly impact concrete output capacity. All existing plants have some ability to increase production, which will be important as demand grows. The combination of local aggregates for concrete and imported aggregates for asphalt reflects Suffolk's balanced approach to meeting different material specifications.

6.11 Tables listing the locations and operators of each Asphalt and Concrete plant can be found in Appendix 5. These detail the sites active as of 2024.

7. Other Relevant Local Information

7.1 To complement the backward-looking data on sales and reserves, the PPG advises that LAAs should consider 'other relevant local information' that might affect aggregate demand in the future. In Suffolk's context, the main factors include population growth, housing development trends, economic conditions, and planned infrastructure projects. These indicators help anticipate whether future demand for aggregates might diverge from past trends. The following is a summary of these factors and their implications for Suffolk.

Population Growth

7.2 Suffolk's population has been growing steadily and is projected to continue rising. As of 2024, the county's population is estimated at around 760,000 (mid-year ONS estimate). Over the period 2022 to 2047, projections indicate a significant increase - Suffolk's population could grow by approximately 100,000 - 130,000 people (approximately +15 to 20%) by 2047. This growth is driven by a combination of net inward migration (people moving into Suffolk, including commuters drawn by the quality of life) and natural change (births minus deaths).

7.3 Growth will not be uniform as it is expected to be concentrated in key urban areas and market towns, notably the Ipswich Policy Area, the Greater Ipswich economic zone, and towns like Bury St Edmunds, Lowestoft, and Sudbury. Coastal and rural populations may see slower growth or even decline in places.

7.4 The implication of population growth is that it fuels demand for new housing, schools, healthcare facilities, infrastructure improvements, and other development, all of which require aggregates. A larger population also maintains pressure on maintaining roads and utilities (ongoing maintenance and upgrades that consume aggregates, e.g. road re-surfacing). The projected growth to 2047 suggests that Suffolk will need to sustain, if not increase, its consumption of construction materials over the long term. In other words, if population grows as projected, it can be expected that aggregate demand will be at least at past levels or more likely increase to provide the necessary development.

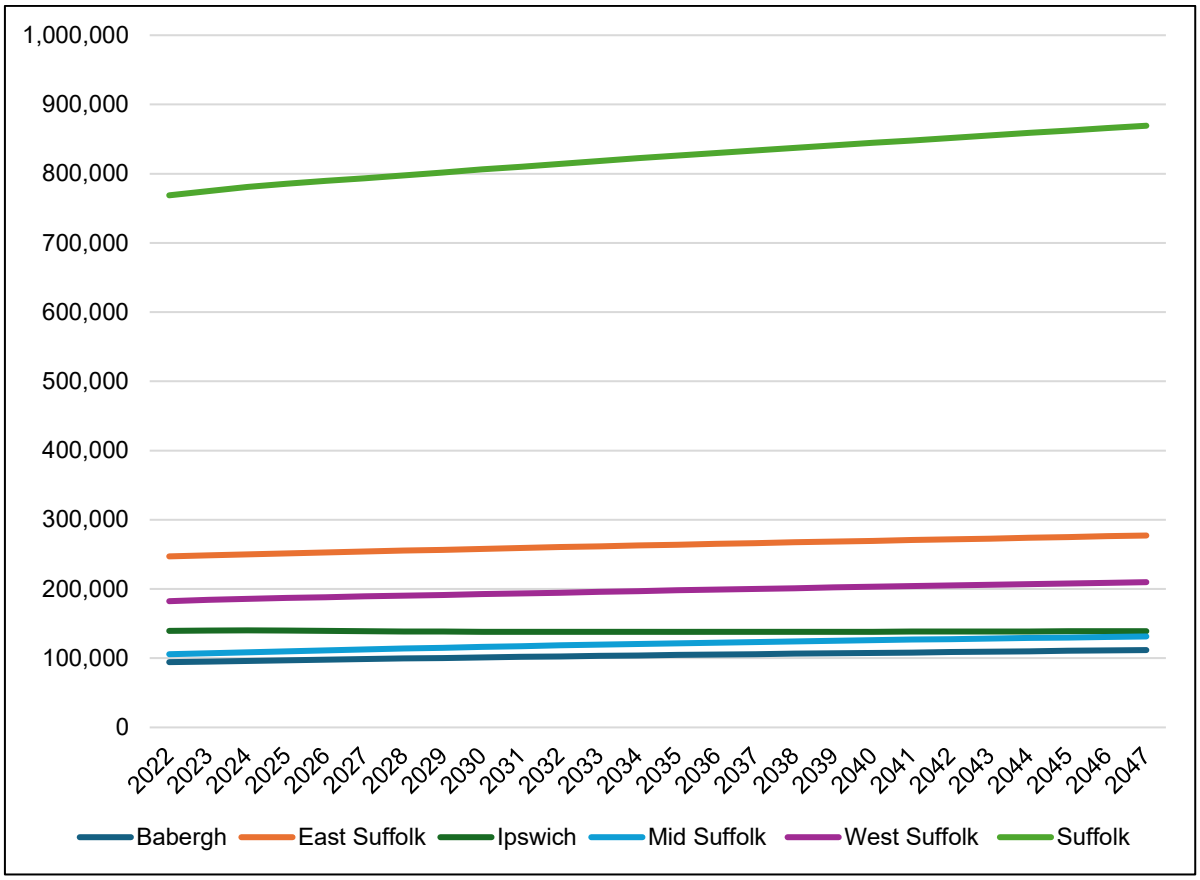


Figure 10: Projected Population Change in Suffolk 2022-2047

Housing Development

7.5 Housing construction is a primary driver of aggregate use. Suffolk's current annual housing need (across all districts) is on the order of 3,162 dwellings per year (as derived from local plans or the standard method). Actual delivery has been keeping pace with or exceeding this figure in recent years:

- In 2021/22, Suffolk delivered 3,477 net additional dwellings, which is about 110% of the annual need.
- In 2022/23 and 2023/24, most Suffolk districts continued to meet or surpass their housing targets. For 2023/24 specifically, provisional data suggests around 100% of the overall target was achieved (with some districts over-performing compensating for any shortfalls in others).

7.6 Looking ahead, housing targets are poised to increase significantly. The Government's standard method for housing need calculation, when updated with the latest data, indicated Suffolk's combined requirement could jump to approximately 5,000 homes per year (a c64% increase from current). While this is a theoretical figure

(and actual building rates may not immediately reach that level), several Suffolk districts are in the process of updating Local Plans and are likely to plan for higher housing delivery to 2040 and beyond.

7.7 Large-scale housing-led developments in the pipeline include:

- Urban extensions around Ipswich (e.g., Ipswich Garden Suburb).
- New settlements or major growth areas in Babergh/Mid Suffolk (such as the proposed Woolpit and Thurston expansions).
- Continued strong building in West Suffolk around Bury St Edmunds and Mildenhall.
- Regeneration and housing in Lowestoft and the east coast, partly linked to offshore energy sector growth.

Implications

7.8 If housing delivery sustains at c3,000+ homes per year or increases toward c5,000, the demand for aggregates will be robust. Each home is estimated to use around 50 - 60 tonnes of aggregate in construction (directly and in infrastructure like roads) according to industry benchmarks. Thus, 5,000 homes/year might require on the order of 250,000 - 300,000 tonnes of aggregate for the housing alone, per year (in addition to other construction). High housing growth, therefore, correlates with high local aggregate demand. Suffolk's LAA will need to reflect any step change in housing numbers by considering upward adjustments to the provision.

7.9 It's also worth noting that housing development in Suffolk often entails significant new road construction (estate roads, new junctions) and other works that consume aggregates like sub-base, asphalt, drainage media, etc. The dispersed nature of housing sites means aggregate demand is spread across the county, not just in one spot, which reinforces the importance of a network of supply points (multiple quarries, depots, etc.).

7.10 Figure 11 shows that while housing delivery has remained strong in recent years, land-won sand and gravel sales in Suffolk have shown a slight decline over the same period. This divergence suggests that, notwithstanding sustained construction activity, an increasing share of the sand and gravel required for housing led development (and potentially other development) may be being met through sources other than quarries

in Suffolk, which include imports of land-won material from neighbouring areas, marine-dredged landings at Suffolk wharves (which were around 0.37 Mt in 2024) and recycled aggregate. In other words, higher demand pressures are being accommodated by a broader supply mix, rather than being reflected solely in land-won sales from sites in Suffolk.

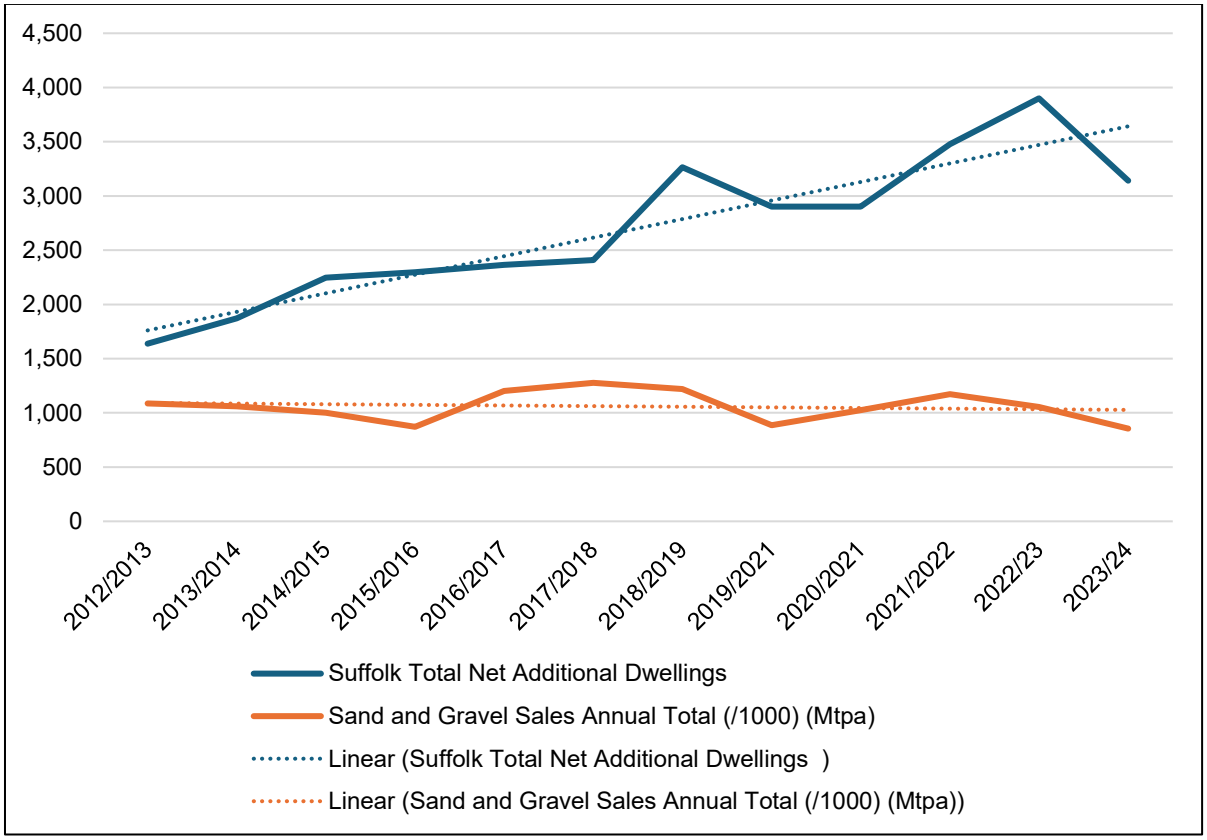


Figure 11: Housing Delivery v Sand and Gravel Sales in Suffolk 2012/13-2023/24

Economic and Industrial Growth

7.11 The overall economic outlook for Suffolk ties into aggregate demand through commercial/industrial development and infrastructure spending. Suffolk's economy has a strong focus on energy (Sizewell nuclear, offshore wind industry around Lowestoft), ports and logistics (Port of Felixstowe - though just outside Suffolk's boundary, and Ipswich), agriculture/food, and technology (e.g., BT at Adastral Park). The construction sector itself is a significant part of the local economy, both as an employer and contributor to GVA.

Some key points

7.12 The construction sector in Suffolk (including civil engineering) had a Gross Value Added (GVA) per job of around £71,000, higher than some other sectors, reflecting its

productivity. It is projected that by 2050, construction-related activities could generate over £4 billion GVA in the Suffolk economy, especially as major projects come online.

- Suffolk and the wider East Anglia region are investing in sustainable construction and design (e.g., the adoption of Passivhaus standards in housing, which could slightly alter construction methods but still require traditional materials).
- There is a drive towards infrastructure improvement as part of economic growth, for example, better road connectivity (A14, A12), improved flood defences to protect economic assets (the Lowestoft Flood Barrier is one such project in planning), and business park developments.
- Latest national economic forecasts from the Office for Budget Responsibility[10] (OBR) indicate modest but sustained growth over the medium term. In its November 2025 Economic and Fiscal Outlook, the OBR projects UK real GDP growth averaging around 1.5 per cent a year over the next five years, slightly weaker than in its March 2025 forecast but still consistent with a gradual expansion rather than recession. This suggests steady, albeit subdued, growth within which UK construction activity is likely to stabilise and then recover gradually. Industry indicators such as registrations for new homes (NHBC), which showed a 6% increase in Q2 2025 compared to Q2 2024, continue to hint at a slow upturn in housebuilding from a relatively low base. If national ambitions for economic growth and infrastructure investment are realised, Suffolk's construction sector, and therefore demand for aggregates, can be expected to see an upturn from this slow, but positive, trajectory.

Implications

7.13 Economic growth translates to investment in buildings and infrastructure, which in turn means demand for aggregates. The push for energy projects (Sizewell C, offshore wind onshore substations, possible new grid infrastructure (including Norwich – Tilbury National Grid upgrade) and other economic drivers in Suffolk is likely to create pulses of high demand for aggregates over the medium term. However, if there were an economic downturn, construction could slow and aggregate demand dip temporarily (as seen in 2009 or 2020).

[10] Economic and fiscal outlook, OBR, November 2025

7.14 One specific area is the energy sector: Suffolk's positioning in the UK Energy Coast means not just Sizewell, but possibly expansions in offshore wind (East Anglia ONE North, TWO, etc.). These projects involve onshore construction (cable routes, substations) which require aggregates. There's also the prospect of new infrastructure around Freeport East (Felixstowe/Harwich) which could indirectly involve Suffolk, and improvements to rail freight routes that might involve significant aggregate use in track ballast and earthworks.

Major Infrastructure Projects

7.15 Suffolk has several major infrastructure projects (NSIPs) either proposed, in planning, or commencing:

- Sizewell C Nuclear Power Station: The largest single project, as discussed, which is now moving into early works. This multi-billion pound project will run for about a decade of construction. It will demand vast quantities of aggregate: millions of tonnes of fill (most of which thankfully is sourced on-site from excavations) and large volumes of concrete (for which high-grade aggregates will be needed). The peak construction years (late 2020s) will see a surge in aggregate imports, likely by sea (a temporary marine jetty is planned) and by road/rail. Suffolk's LAA acknowledges Sizewell C but notes that local quarries are not expected to be the primary source for the majority of its aggregates. Instead, crushed rock and sand from outside the county will be brought in, meaning the project's impact is more on the import infrastructure (rail, port, roads) than on local reserve depletion. Still, indirect effects include local demand for ancillary works and increased competition for materials regionally.

- Road Improvements (A12, A14, etc.): The A12 near Ipswich and towards Lowestoft is slated for upgrades (e.g., the Lake Lothing third crossing was recently completed in Lowestoft, and the A12 Four Villages Bypass and A12/A14 junction improvements are in planning). Road projects usually require crushed rock for the road base and asphalt for surfacing. Past experience (as noted) is that these projects import crushed rock rather than using local aggregate, due to material specifications. However, local sand and gravel could be used for concrete structures or ancillary works if suitable. The timeline of these road schemes (late 2020s) will overlap with Sizewell C.

- Flood and Coastal Defences: Given Suffolk's coastline and estuaries, there are ongoing and upcoming flood defence works (e.g., the tidal barrier for Ipswich was completed a few years ago using considerable aggregate in concrete; Lowestoft has flood walls and a barrier in development). These projects consume aggregates in concrete and bulk fill. Often they need marine-dredged aggregate for fill in coastal projects, which could modestly increase marine landings.
- Rail Projects: While no major new rail lines are planned in Suffolk, there are rail network upgrades (like branch line improvements or new bridges) that use aggregates. If the proposed East West Rail project (connecting Oxford-Cambridge) extends to East Anglia, that could in future increase demand for ballast and other materials in the west of Suffolk, but that is speculative at this stage.
- Energy/Utilities: Beyond Sizewell, there are other energy projects, for example, National Grid reinforcement, new solar farms (which involve less aggregate except in substation foundations), and potentially expansion of port facilities for offshore wind assembly (Freeport East). These often involve concrete foundations and access roads, hence aggregate use.

7.16 Many of these infrastructure projects will involve bringing in aggregate from outside Suffolk, especially high specification materials. For example, Sizewell C's concrete aggregate might come from the Mendips or further and be delivered by sea or rail. Road projects might get their bulk aggregate from Midlands quarries via rail to Suffolk's depots. The key for Suffolk is that its infrastructure capacity (rail depots, wharves, haul routes) can accommodate the influx without displacing local needs.

7.17 From a planning perspective, the LAA must consider that these projects will create short to medium-term spikes in demand that may not be reflected in the past 10-year average. PPG allows consideration of such other relevant information and clearly, these projects suggest that future demand in the late 2020s could exceed the recent past. It may justify an uplift in the provision rate when calculating landbanks, to ensure Suffolk is not underestimating what's needed. This section considers the implications of certain uplifts in provision rate.

Implications for Aggregate Demand

7.18 The ‘other relevant information’ set out above strongly suggests that demand for all aggregates, sand, gravel, crushed rock, and recycled materials, in Suffolk is likely to increase in the coming years.

7.19 In the short to medium term (next 5 - 10 years), major civil engineering schemes such as Sizewell C and the A12 improvements will consume very large volumes of aggregate, especially over concentrated periods. While some of this will be supplied by on-site materials or imports, it still represents a significant draw on the regional aggregate supply system (and any on-site use is aggregate that otherwise might have come from a quarry).

7.20 In the longer term (beyond 2030), the need to meet higher annual housing targets and to support general economic growth means aggregate consumption can be expected to exceed historical levels on a sustained basis. Essentially, Suffolk may transition from an era of c1 Mt/yr consumption to a higher baseline if thousands more homes and associated infrastructure are built each year.

7.21 Specific materials: Crushed rock demand will definitely increase because of the infrastructure bias towards imported hard aggregate. Sand and gravel demand should also increase due to housing and general construction, though if more hard aggregate is used in roads, the mix of usage might shift slightly (but not enough to offset overall growth).

7.22 Recycled/secondary aggregates are likely to see increased production too, as construction activity picks up resulting in increased CD&E waste generation. However, these sources have practical limits and will at best augment, not replace, primary aggregates in meeting any demand surge.

7.23 In planning terms, Suffolk’s LAA should account for these indicators by not relying solely on backward-looking averages. It is prudent to consider a higher provision rate (an ‘uplift’) above the past 10-year sales to ensure capacity is in place. This could involve working with neighbouring counties, ideally via Statements of Common Ground, to ensure that Suffolk’s increased needs can be met by a combination of local production and imports (since Suffolk contributes to others’ needs in sand and gravel and relies on others for crushed rock).

7.24 In summary, the evidence points to clear upward pressure on future aggregates demand in Suffolk. The county is entering a phase of growth where past supply patterns (which were relatively steady or declining) may not be a reliable guide for the next decade. The Mineral Planning Authority will need to monitor actual sales closely and be prepared to adjust planning strategies, whether that means accelerating the permitting of allocated sites, collaborating with other regions to secure aggregate imports, or both, to maintain the statutory 'steady and adequate supply' of aggregates.

Landbank Implications of Uplifted Provision Rates

7.25 Suffolk's permitted sand and gravel reserves at the end of 2024 were approximately 8.91 Mt, deriving a landbank of about 8.7 years based on the 10-year average APR of c1.03 Mt/yr. This exceeds the minimum 7-year landbank required by the NPPF, but as noted above, future demand is expected to increase. To test the robustness of the landbank under higher demand, alternative provision scenarios have been derived. Table 5 below summarises the landbank duration (years of supply) and the projected reserve shortfall by 2036 under each uplift scenario, compared to the baseline. All scenarios assume no new reserves (no 'replenishment') beyond the current permitted 8.91 Mt and any already allocated sites. The plan period extends to 2036, which is 12 years from the end of 2024, so the shortfall is the amount by which demand over the period 2025 to 2036 would exceed the available 8.91 Mt reserves.

Table 5: Sand & Gravel Landbank and Reserve Shortfall under Baseline and Uplift Scenarios (end-2024 data, plan period to 2036)

Scenario (Annual Provision Rate)	Landbank (years)[11]	Projected Reserve Shortfall by 2036 (Mt)[2]
Baseline - 10-year avg (1.03 Mt/yr)	c8.7 years	c3.5 Mt shortfall
Medium +10% - APR c1.16 Mt/yr	c7.7 years	c5.0 Mt shortfall
Medium +20% - APR c1.27 Mt/yr	C7 years	c6.3 Mt shortfall
High +30% - APR c1.37 Mt/yr	c6.5 years	c7.5 Mt shortfall
High +50% - APR c1.58 Mt/yr	c5.6 years	c10.0 Mt shortfall

7.26 As shown in Table 5 above, higher provision rates significantly reduce the landbank duration. Under the +10% Medium scenario, the landbank would drop to

[11] Landbank in years = current permitted reserves (8.91 Mt) divided by annual provision rate.

approximately 7.7 years, still just above the 7-year policy minimum. More aggressive growth puts the landbank well below 7 years, for example, a +30% APR yields only c6.5 years of reserves, and a +50% APR just c5.6 years. In these high-demand cases the current permitted reserves would be exhausted several years early, underscoring that additional reserves (through new permissions or site allocations) would be required much sooner to maintain the statutory landbank. Figure 12 illustrates the landbank span under each scenario, with the NPPF minimum marked for reference.

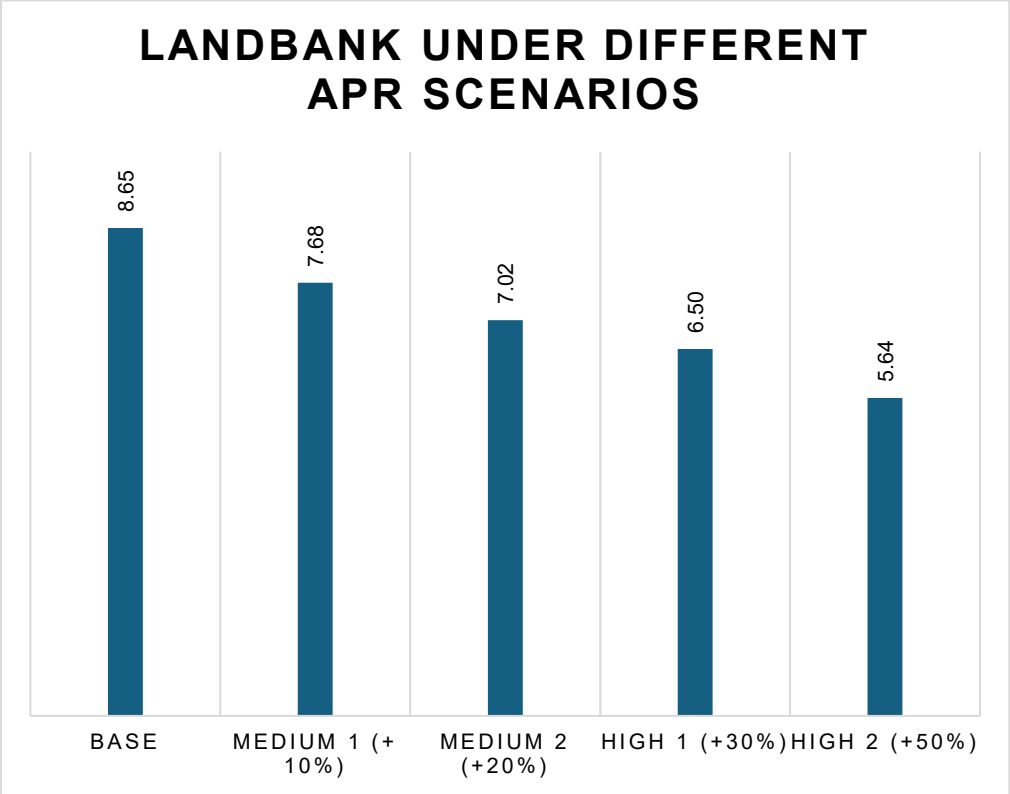


Figure 12: Landbank Duration (years) under Baseline vs. Uplifted Provision Scenarios.

7.27 Likewise, the reserve shortfall by 2036 grows progressively larger in the uplift scenarios (Figure 13). Assuming no new supply comes forward, Suffolk would face a shortfall of approximately 3.45 Mt by 2036 under the baseline 1.03 Mt/yr provision (this shortfall equates to about 4 years of sales). In a Medium +20% demand scenario, the shortfall is projected at about 6.33Mt, around 3 Mt higher than the base case. Under a High +30% scenario the gap reaches c7.5 Mt, and in the extreme +50% case the shortfall could be on the order of 10 Mt (well over double the base case shortfall). This worst-case scenario reflects a situation where Suffolk's annual demand (c1.58 Mt) is at a historically unprecedented level - for context, that is approximately equivalent to 50% above the past decade's average, a level which might only be approached if all

growth drivers (housing, major infrastructure, economic boom) occur together. While unlikely to persist long-term, it shows that without new capacity, current reserves would not support such a surge (the landbank would fall to c5 years and the supply deficit by 2036 would be substantial). The Council would need to accelerate additional provision (permitting new quarry sites or extensions) to avoid the landbank dropping below 7 years in these high-demand circumstances.

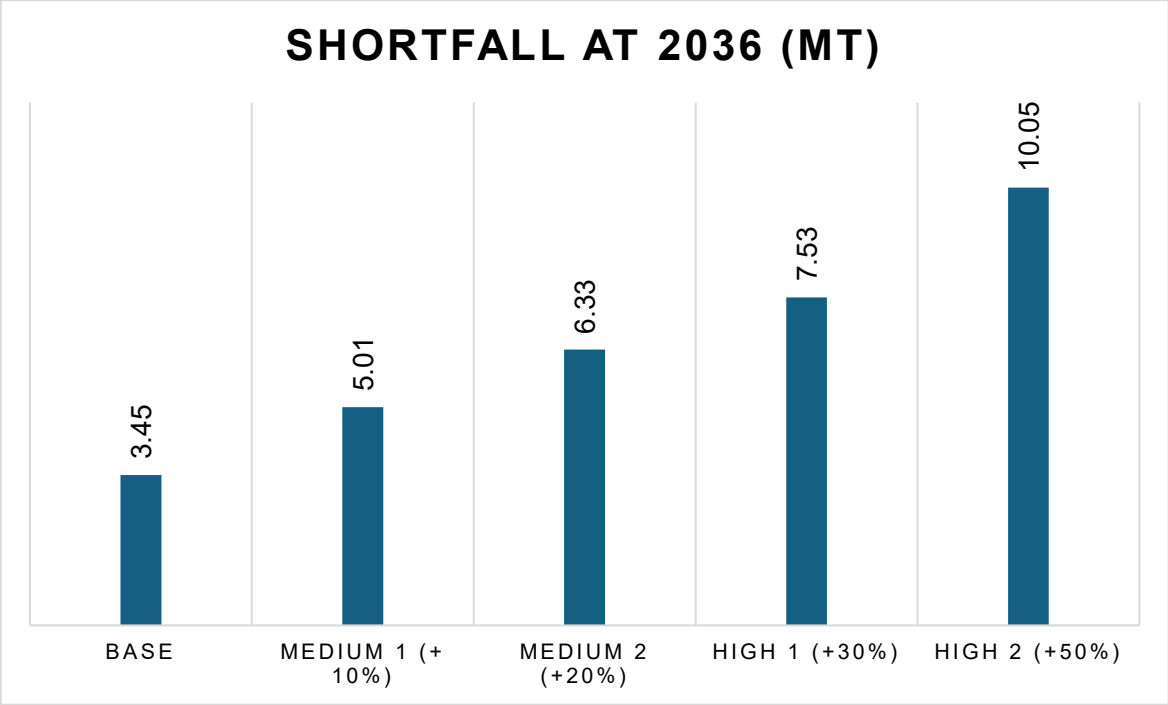


Figure 13: Projected Reserve Shortfall (Mt) by 2036 under Different Annual Provision Scenarios (Baseline vs Uplifts).

7.28 In terms of the Annual Provision Rate (APR) itself, the Medium uplift scenarios would set the provision at 1.16 and 1.27 Mt per year versus the 1.03 Mt baseline, and the High scenarios at approximately 1.37 Mt and 1.58 Mt per year. Figure 14 compares these rates. For context, Suffolk's highest recent land-won sales were about 1.17 Mt (in 2021) which means the +10% scenario is only slightly above a level already observed in the past few years, whereas the +50% scenario is approximately equivalent to doubling the 2023 output (0.86 Mt) and markedly above any historical production. This illustrates the range of potential demands the LAA has considered. Presenting APR options up to 1.58 Mt/yr, demonstrates foresight in planning for uncertainty but, importantly, this does not imply that Suffolk will adopt a 1.58 Mt APR now, instead, it provides evidence to inform whether an upward adjustment might be justified in future. The decision on whether to adjust the LAA provision rate from the

10-year average will consider how demand trends actually evolve, supported by this scenario analysis and guided by the principle of ensuring a steady and adequate aggregate supply.

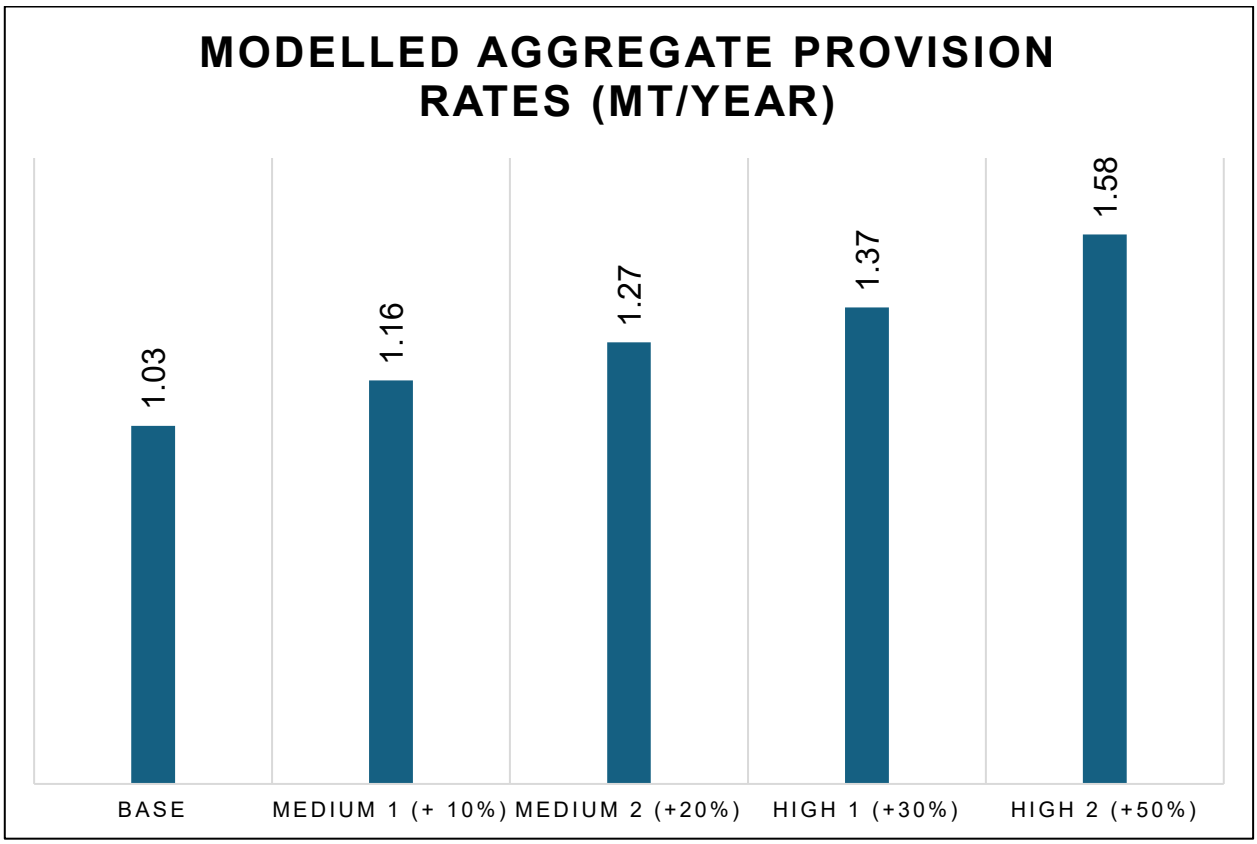


Figure 14: Modelled Aggregate Provision Rates (Mt/year) - Baseline 10-year Average vs Uplifted Demand Scenarios.

Summary of Scenario Findings

7.29 Consideration of the uplift scenarios in this LAA provides insight into how Suffolk's supply/demand balance could change under higher growth conditions. The baseline 10-year average (1.03 Mt) remains the principal reference for landbank and provision calculations and it currently derives a 8.7 year landbank and a moderate 3.5 Mt shortfall by 2036 (assuming only existing reserves).

7.30 The Medium and High scenarios, treated equally as exploratory options, indicate that if annual demand were 10 to 20% higher, Suffolk's landbank would dip slightly below the minimum and shortfalls would increase to c5 to 6 Mt, whereas 30 to 50% higher demand would reduce the landbank to around 5.5 to 6.5 years and create much larger shortfalls (c7.5 to 10.0 Mt).

7.31 In practical terms, this analysis reinforces the importance of monitoring demand signals (e.g. sustained increases in sales, acceleration of housing build-out, confirmation of major projects) in the coming years. Should such trends materialise, the County Council may need to review the LAA provision rate (in line with PPG guidance) and proactively plan for additional reserves to maintain at least a 7-year landbank. By forecasting the potential scale of shortfall under higher growth, Suffolk's LAA can better ensure it meets the NPPF obligation to plan for a steady and adequate supply under a range of possible futures. All scenarios will be kept under review in annual LAA updates, ensuring that the chosen provision rate remains responsive to actual economic and construction trends in the county.

8. Monitoring and Review

8.1 Suffolk County Council will continue to monitor aggregates supply and demand through its Annual Monitoring Reports (AMRs) and the yearly update of the Local Aggregate Assessment. The Suffolk Minerals and Waste Local Plan (2020) includes specific monitoring indicators to track whether a steady and adequate supply of aggregates is being maintained:

- Maintenance of the minimum 7-year landbank for sand and gravel.
- Progress in bringing allocated sites into production.
- Levels of aggregate provision in comparison to planned requirements (the rolling average).
- Use of recycled aggregates and new capacity permitted for recycling facilities.
- Any significant change in import/export balance.

8.2 As of this LAA (2024 data), all indicators are generally being met:

- The land-won sand and gravel landbank remains above 7 years but only by a small margin and as this is a minimum level it suggests that supply has a relatively low level of resilience.
- The Plan's allocated sites have not yet been developed, but one or more planning applications are anticipated in the near future as reserves at existing sites diminish.
- Sales in recent years have approximately tracked the provision rate, though 2024 dipped below and this will be monitored to see if it's a one-off or a new pattern.
- Recycled aggregate capacity is being maintained, with all known sites safeguarded and new permissions granted where appropriate.

8.3 Current evidence suggests the adopted Plan's strategy (using the 10-year average and allocated sites) is still appropriate to meet needs. Notably, the examination of the Sizewell C project concluded that an early Plan review specifically to address that project was not necessary, since its aggregate requirements could be managed via existing mechanisms (on-site material and imports). However, the Council is aware that the identified shortfall by 2036 (around 3.5 Mt if no new sites) should be proactively addressed in the next few years. In any event, a Plan review is needed to

meet the requirement to review local plans within five years of adoption and to ensure the Plan is consistent with the reforms to the plan making system and imminent updates to national policy.

8.4 Plan monitoring will pay special attention to:

- Annual sales trends (to detect any sustained increase that might warrant adjusting the APR).
- Remaining permitted reserves (to update the landbank).
- Progress on significant projects (like Sizewell C and A12) which, if accelerated, might draw heavily on supplies.

8.5 A draft of this LAA was shared with the East of England Aggregates Working Party and comments received were taken into account when finalising the document.

8.6 Suffolk County Council remains committed to monitoring its aggregate supply closely and will respond as needed to ensure the requirements of national policy are met. The LAA process itself is a key tool in this ongoing monitoring and will continue on an annual basis.

8.7 In 2026, the Council will commence preparation of a new Minerals and Waste Local Plan, in line with Government reforms to the plan making system, which will include a Call for Sites. This LAA, and subsequent versions, will provide important evidence to support the preparation of policies concerning the supply of aggregate in the new Plan.

9. Strategic Cross Boundary Cooperation

9.1 Suffolk County Council, as the Minerals Planning Authority, fulfils requirements on strategic cross-boundary minerals matters in several ways:

- The Council is an active member of the East of England Aggregates Working Party (EEAWP). Through the AWP, Suffolk engages with other MPAs in the region to share data and coordinate approaches to aggregates planning. The AWP provides a forum for discussing Suffolk's LAA findings, including any implications for inter-area flows or the need for support from other regions if shortfalls are identified. The statistical basis for aggregates provision in Suffolk (e.g., our 10-year average sales and landbank figures) is scrutinised and agreed at the AWP level.
- Suffolk also sits on the East of England Waste Technical Advisory Body, recognising the overlap in recycled aggregates and waste management issues. While that mainly concerns waste, it complements the aggregates work by addressing CD&E waste recovery.
- The Council liaises with neighbouring and partner authorities. Suffolk shares borders with Norfolk, Cambridgeshire/Peterborough, and Essex (as well as having the North Sea on the east). There are significant inter-dependencies: For example, Suffolk imports land-won sand and gravel from Essex, Norfolk and Cambridgeshire, and exports some to Norfolk; Suffolk relies on crushed rock from outside (Leicestershire, etc.) so has an interest in those areas' plans. Through duty to cooperate, Suffolk has provided input to and received input from such authorities during their LAA and plan-making. No unresolved strategic issues have been identified with all parties acknowledging the patterns of import/export as generally stable and mutually acceptable.
- The statistical basis for aggregates provision in Suffolk, as updated by this LAA, will be shared with adjoining regions to ensure they are aware of Suffolk's future needs. For example, if Suffolk expects to increase reliance on crushed rock from the East Midlands, that will be communicated through the AWP channels to inform those regions' planning.
- Suffolk County Council officers participate in national workshops and maintain communication with bodies like the Marine Management Organisation (for marine

aggregates) and The Crown Estate, given the marine sand and gravel landed in the county.

9.2 In summary, Suffolk County Council engages constructively, actively, and on an ongoing basis with other authorities and stakeholders to address strategic aggregate supply issues. This cooperative approach ensures that Suffolk's plans take into account cross-border flows and that Suffolk contributes appropriately to wider regional aggregate needs. It also helps pre-empt any potential conflicts, for example, if Suffolk were drastically short of sand and gravel, early discussions with adjacent counties could identify if they have the ability to increase supply to Suffolk (or vice versa). As of this LAA, discussions have confirmed:

- **Sand and Gravel:** Suffolk continues to meet most of its own demand and will plan to do so, but will keep neighbours informed if allocations/permissions don't come forward (potentially increasing imports).
- **Crushed Rock:** Suffolk will remain dependent on other areas - those areas (e.g. the East Midlands) are aware of their role and Suffolk supports their efforts to maintain production and transport infrastructure.
- **Recycled Aggregates:** Suffolk shares best practices with others in safeguarding and promoting recycling facilities, recognising this benefits everyone by reducing primary demand.

9.3 This LAA document stands as part of Suffolk's evidence of strategic cooperation, demonstrating transparency about its aggregate needs and provision. Going forward, Suffolk will continue to cooperate through the AWP and direct engagement to ensure the steady and adequate supply of aggregates is achieved not just for Suffolk but for the wider region.

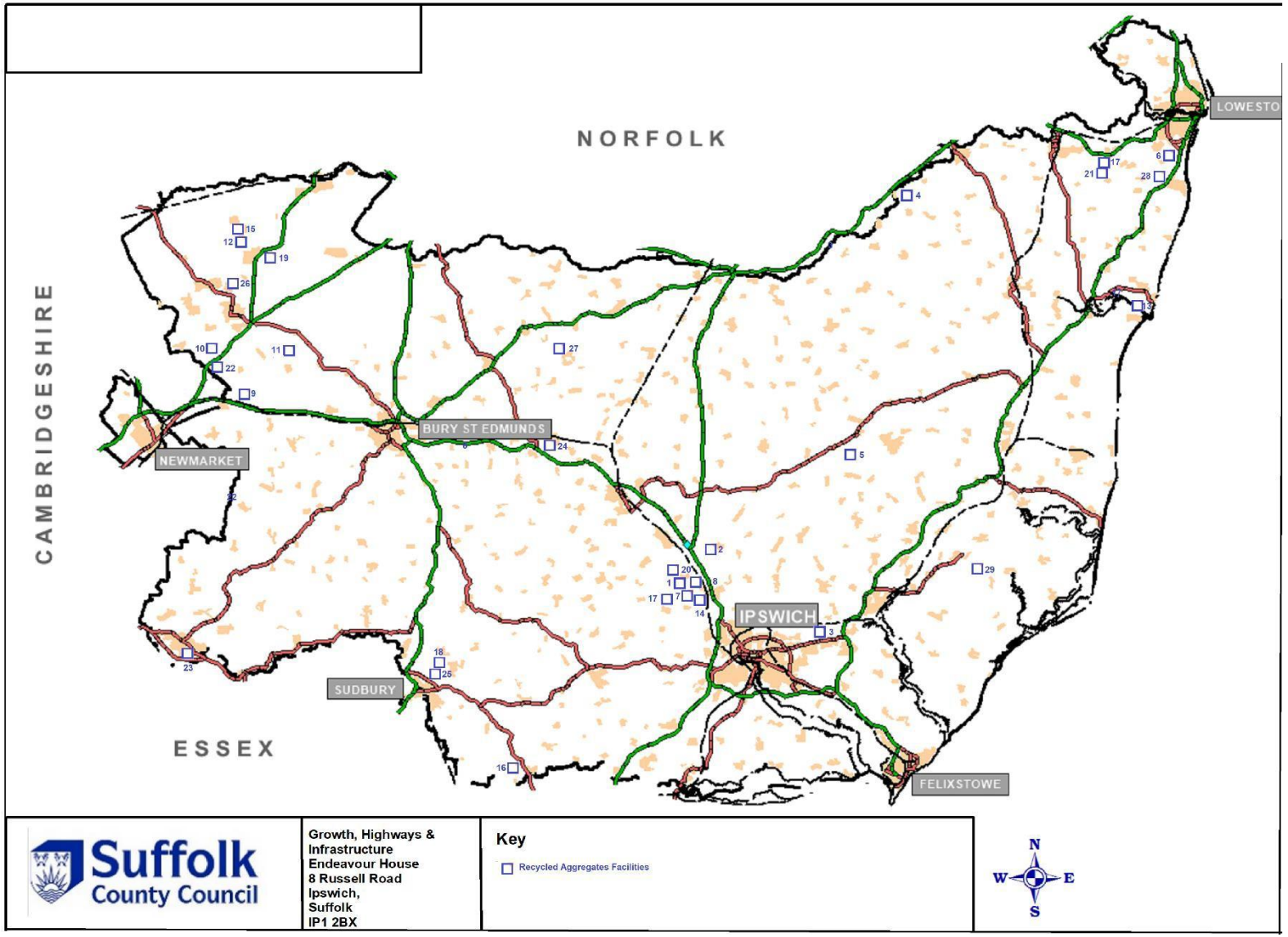
10. Appendices

Appendix 1: Recycled aggregates facilities in Suffolk

Site No.	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

Site No.	Site Name	Operator	Grid Ref	
			Easting	Northing
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
28	Solar Farm, Church Road, Gisleham	Ley Plant	652488	288370
29	The Control Tower (Recycling) Bentwaters	John Kemble	634136	252681

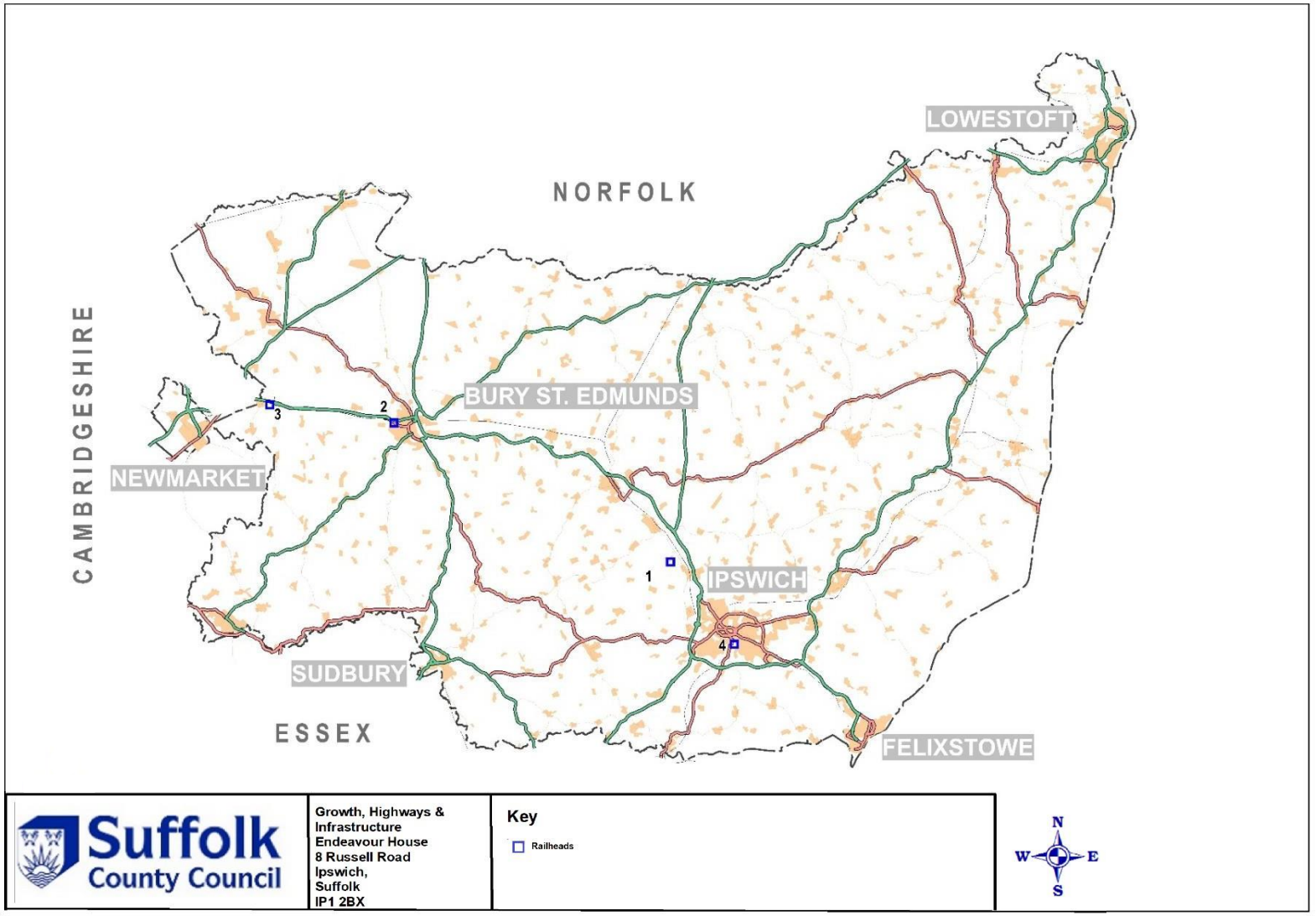
Location of recycled aggregates facilities in Suffolk



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 (Inactive)	Tarmac	585115	265164
3	Gazeley Railhead (Kentford/Higham)	Tarmac	571872	266987
4	West Bank Terminal, Ipswich	Brett Aggregates	616735	243191

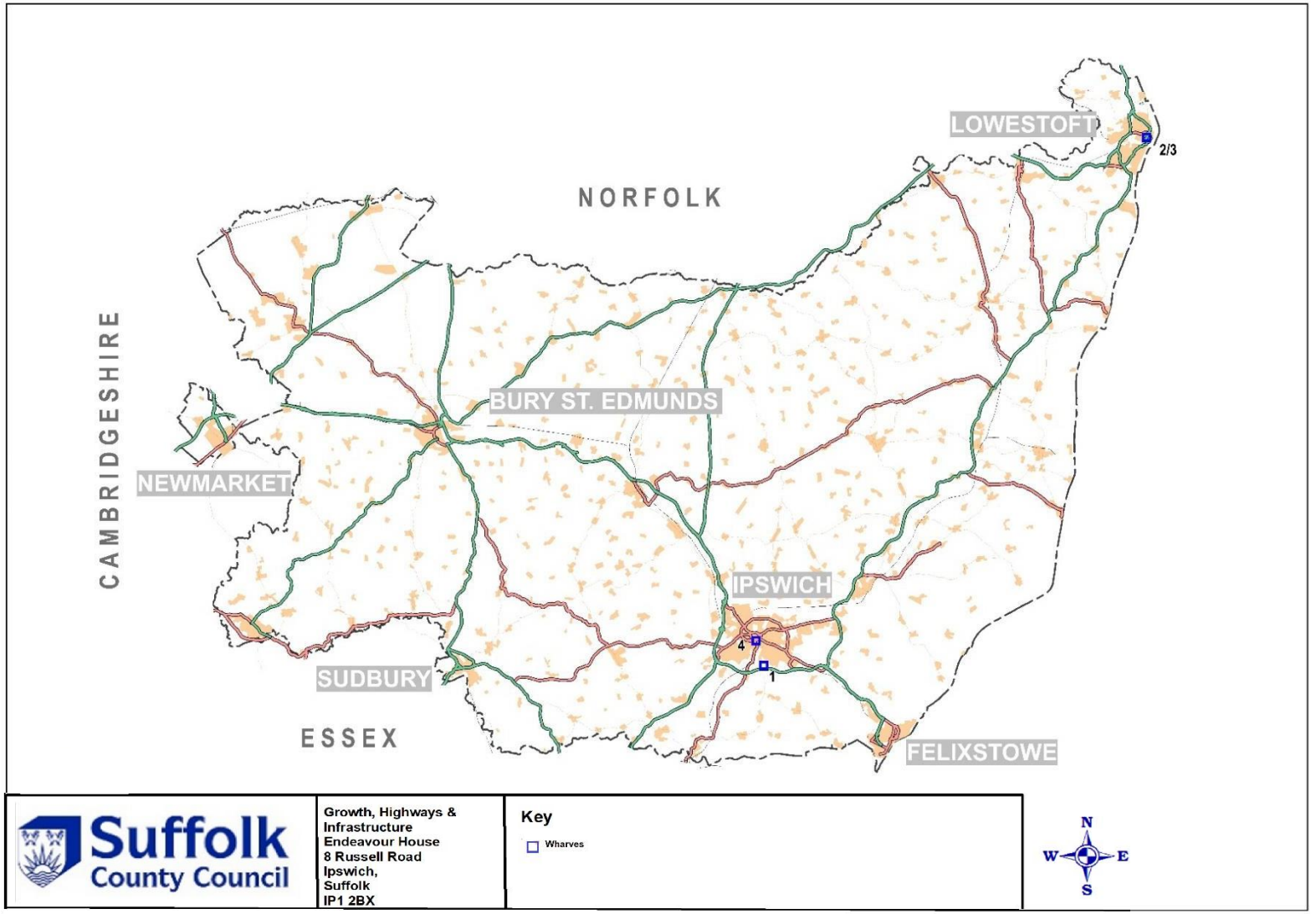
Location of railheads in Suffolk



Appendix 3 Aggregates Wharves In Suffolk

Wharves				
Site Number	Site Name	Operator	Grid Ref	
			Easting	Northing
1	Cliff Quay (East Bank), 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 aggregates wharves in Suffolk



Appendix 4 Quarries In Suffolk

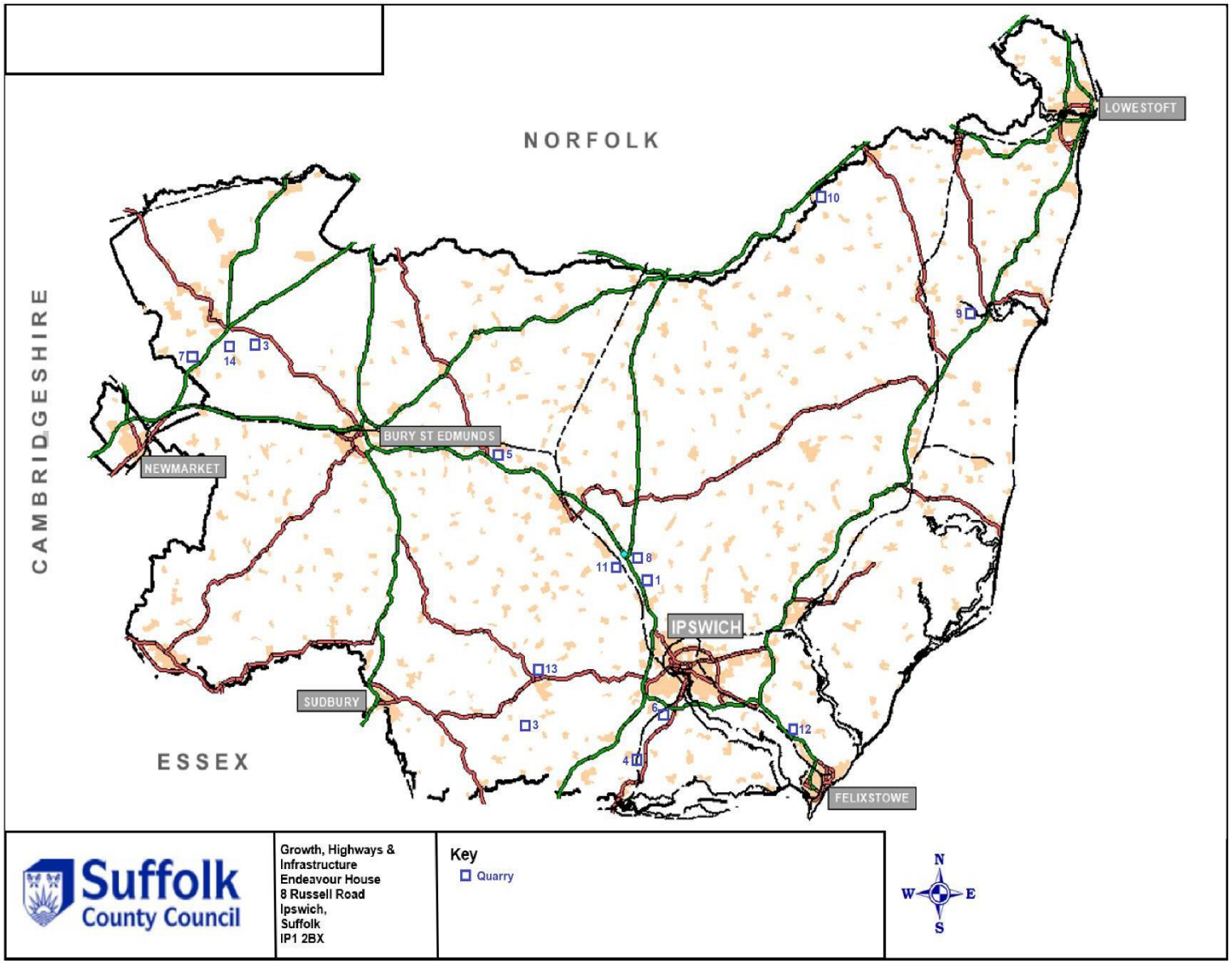
Aggregate Quarries

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 (Folly Farm)	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
3	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