



Norfolk County Council

Norfolk Minerals and Waste Local Plan

Monitoring Report - Mineral Data
Local Aggregate Assessment
for calendar year 2019

December 2020



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Executive Summary

Summary of sand and gravel conclusions	Performance in 2019	In comparison with previous year (2018 data)
Land-won sand & gravel sales (million tonnes, Mt)	1.329	 - 0.182 (1.511)
Permitted reserves of sand & gravel (Mt)	13.515	 +0.204 (13.311)
Annual production as a % of Apportionment figure	52%	 - 7% (59%)
Landbank based on 10 years sales average (years)	9.96	 +0.16 (9.8)
Landbank based on 3 years sales average (years)	9.12	 +0.7 (8.4)
Landbank based on Apportionment figure (years)	5.25	 +0.05 (5.2)
Number of allocated sites without planning permission	18 (but 5 sites are unlikely to be delivered)	19 (but 5 sites are unlikely to be delivered)
Potential yield (Mt) from allocated sites	18.85 (but 5 sites with 3.2Mt are unlikely to be delivered)	19.18 (but 5 sites with 3.2Mt are unlikely to be delivered)

E.1 There are two general mineral types which are extracted for aggregate use in Norfolk. These are sand and gravel and carstone, and key facts on the production of these minerals during the calendar year 2019 are shown below.

Sand and Gravel key facts

- Annual production was 1.329 million tonnes (mt) up to 31 December 2019. Annual production was 12% down on production in 2018 of 1.511mt
- The 10-year average of annual production was 1.356mt up to the end of 2019.
- The 10-year average for 2019 was 0.4% down on the 2018 figure of 1.361mt.
- The 3-year rolling average was 1.48mt up to 31 December 2019. The 3-year rolling average was 0.37% down on the 2018 figure of 1.58mt.
- Norfolk's apportionment of sand and gravel from sub-national guidelines is currently 2.57mt, having previously been 2.98mt until the end of 2010 and 3.4mt prior to 2003.
The annual production for 2019 (1.328 mt) was 52% of the apportionment target; this was down 7% on the annual production for 2018, which was 59% of the apportionment target.
Sand and gravel production in Norfolk has not reached the apportionment target in the last twenty years. The 20-year average of annual production is 1.822 mt.
- There were four planning permissions granted for additional sand and gravel extraction totalling 903,000 tonnes, in 2019.
- Reserves of sand and gravel at 31 December 2019 were 13,515,491 tonnes, an increase of 1.5% on the 2018 figure.
- Based on the 10-year average production figure of 1.356mt, the remaining allocated sites in the Minerals Site Specific Allocations Plan (excluding sites in Shropham and Swardeston which are no longer expected to be delivered) would provide a further 11.5 years of sand and gravel resource (15.64 Mt).

Carstone key facts

- Annual production was 39,878 tonnes up to 31 December 2019. Annual production was 62.48% down on production in 2018 of 106,278 tonnes.
- The 10-year rolling average was 75,381 tonnes up to 31 December 2019. The 10-year rolling average was 3.39% down on the 2018 figure of 78,023 tonnes.
- The 3-year rolling average was 81,245 tonnes up to 31 December 2019. The 3-year rolling average was 21.45% down on the 2018 figure of 103,431 tonnes.
- Norfolk's apportionment of carstone from sub-national guidelines is currently 200,000 tonnes, having previously been 250,000 prior to 2003. The annual production for 2019 (39,878 tonnes) was 20% of the apportionment target; this was 33% down on the 2018 figure. Carstone production in Norfolk has reached the apportionment target once in the last twenty years. The 20-year average of annual production is 115,787 tonnes.

Recycled and secondary aggregate key facts

Note: this data is for 2018 and has not been updated for 2019

Please note that the data contains inert and Construction/Demolition waste; some parts of this waste stream are unsuitable for use as recycled aggregate, however it is not possible to disaggregate these wastes from the totals.

- Annual production was approximately 494,000 tonnes up to 31 December 2018. Annual production was approximately 18% up on production in 2017 of 418,000 tonnes.
- The 10-year rolling average was 412,100 tonnes up to 31 December 2018. The 10-year rolling average was approximately 0.5% down on the 2017 figure of 413,900 tonnes.
- The 3-year rolling average was 449,000 tonnes up to 31 December 2018. The 3-year rolling average was approximately 11% up on the 2017 figure of 449,000 tonnes.

Conclusion

E.2 Norfolk's share of the sub-national guideline figures (the apportionment) for sand and gravel of 2.57 million tonnes per annum and carstone of 0.2 million tonnes per annum is higher than the 10-year, 3-year or 20-year average figures derived from local production. These higher figures were used in Core Strategy Policy CS1 as the basis for allocations to plan for the provision of a steady and adequate supply of aggregate and provide flexibility.

E.3 Average annual sales of 1.36 million tonnes for sand and gravel and 0.075 million tonnes for carstone (as at 31/12/19) have been derived from a ten-year sales-based assessment compliant with the NPPF and NPPG. The Mineral Planning Authority does not consider it prudent at this time (prior to the outcome of the Norfolk Minerals and Waste Local Plan Review) to base allocations purely on a rolling average of ten years' sales, as having regard to paragraph 11 of the NPPF, flexibility is required in allocations.

E.4 The current Minerals and Waste Local Plan Review is the most appropriate method of determining any revised target for Core Strategy Policy CS1, having regard to the

data in this LAA. The aim of any revised target will be to achieve an adequate and steady supply of aggregate over the revised plan period to 2036, recognising that Norfolk has not met the apportionment figure for many years. Minerals sales figures for Norfolk will be used to determine the most appropriate production figure for site allocations to be based on, considering the need to balance flexibility in supply to meet growth targets, while ensuring the timely completion and restoration of aggregate extraction sites.

E.5 The Initial Consultation document proposed that the 20-year average would provide the best approach as this time period includes data from at least one complete economic cycle, alternatives such as the 10-year rolling average were also included in the consultation document. The 20-year average production contained in the Initial Consultation covered the period from 1997-2016 and was 1,980,000 tonnes per annum for sand and gravel and 126,500 tonnes per annum for carstone.

E.6 The six-week Preferred Options consultation on the Minerals and Waste Local Plan Review took place during September/October 2019. More recent minerals data was available and the 20-year average production contained in the Preferred Options document covered the period from 1999-2018 and was 1,868,000 tonnes per annum for sand and gravel and 121,400 tonnes per annum for Carstone.

E.7 The Minerals Plan is up to date in relation to the supply of aggregate, and the County Council considers that sufficient sand and gravel allocations within the plan to meet the current adopted CS1 target, to 2026, are deliverable.

E.8 Norfolk County Council undertook a Single Issue Silica Sand Review of the Minerals Site Specific Allocations Plan. This was examined in March 2017 and found sound and legally compliant; and was adopted by the Council in December 2017. Silica sand is a nationally important industrial mineral and is not used for aggregate uses in Norfolk.

E.9 Secondary & Recycled Provision Allowance to 2026 – the locally derived data available on secondary and recycled aggregate is variable and not considered completely comprehensive because many operations, such as on-site recovery, are not recorded. The data contains inert and Construction/Demolition waste; some parts of this waste stream are unsuitable for use as recycled aggregate, however it is not possible to disaggregate these wastes from the totals. This makes it difficult for Norfolk County Council to reduce the level of land won aggregate provision on this basis. The work carried out to produce the aggregate apportionment figures for the period 2005-2020 took account of the capacity of facilities to provide recycled and secondary aggregates i.e. the assumptions are built into the apportionment figure. Planned aggregate provision will be reviewed as part of the current Minerals and Waste Local Plan Review but it is not proposed to make any adjustments to the forecast mineral requirement figures based on secondary and recycling aggregate provision due to the quality of the data.

E.10 Marine Sources Requirement to 2026 – the total of less than 500 tonnes of marine sourced aggregate represents such a small percentage of the total aggregates used in Norfolk it is not proposed to make any adjustments to the mineral requirement figures based on marine sourced aggregates.

1. Introduction

1.1 This document is Norfolk’s Local Aggregate Assessment. In order to provide information on all of Norfolk’s mineral extraction in one place, data on non-aggregate minerals has been included in separate sections at the end of this LAA. The non-aggregate minerals worked in Norfolk are silica sand, clay and chalk.

1.2 Annual monitoring of aggregate production and reserves in Norfolk has been carried out since 1975. In 2019 almost all the active sites produced sand and gravel, although there are three carstone (a type of sandstone) workings in West Norfolk producing fill and aggregates. In addition, there is one clay working, three active chalk workings and one major silica sand operation in the County. These existing sites are listed in this document in section 8.

1.3 The National Planning Policy Framework (NPPF) (February 2019) paragraph 207 requires Mineral Planning Authorities to plan for a steady and adequate supply of aggregates by determining their own levels of aggregate provision based on a rolling average of 10 years sales data and other relevant local information. The National Planning Practice Guidance (NPPG) contains current government guidance regarding Local Aggregate Assessments (LAA).

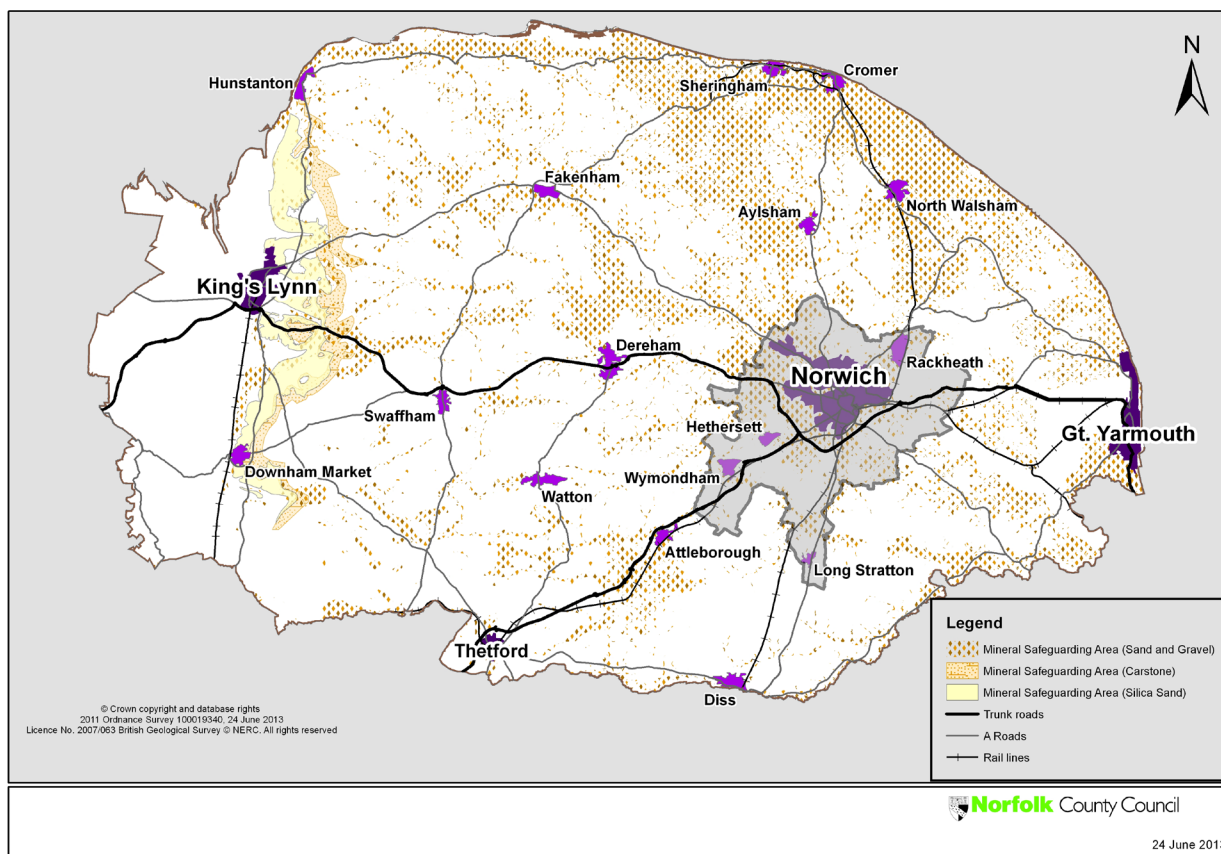
1.4 The NPPG contains similar requirements to the previous MASS guidance in relation to LAA’s and states that LAAs are a monitoring report to provide “an annual assessment of the demand for and supply of aggregates in a mineral planning authority’s area.”

1.5 LAAs should include:

- a forecast of the demand for aggregates based on both the rolling average of ten-year sales data, and other relevant local information;
- an analysis of all aggregate supply options; this analysis should be informed by planning information, the aggregate industry and other bodies such as local enterprise partnerships; and,
- An assessment of the balance between demand and supply, and the economic and environmental opportunities and constraints that might influence the situation.

1.6 The rolling average of 10-years sales data will inform the targets for mineral extraction requirements. The LAA is a part of the evidence base and will inform the Mineral and Waste Local Plan Review. It is important to note that the landbank figures included within the LAA are, as stated in the NPPG, “principally a monitoring tool to provide a Mineral Planning Authority with early warning of possible disruption to the provision of an adequate and steady supply of land-won aggregates”. As landbanks relate to the provision of aggregates, a figure below 7 years for aggregate and 10 years for crushed rock should be used as a trigger to determine whether an early review of the Local Plan is required.

Minerals in Norfolk



Map 1: Mineral resources in Norfolk

1.7 Sand and gravel is the main aggregate worked in Norfolk. Sand and gravel resources are located throughout the county (except for the Fens area in the far west and south-west of Norfolk). Sand and gravel is used in the construction of roads and buildings and is a key ingredient in the production of concrete and mortar, asphalt coating for road, as a drainage medium and in the construction of embankments and foundations.

1.8 Carstone is a type of sandstone that is quarried in relatively small quantities in West Norfolk. It has traditionally been used as a vernacular building material, although it is no longer used to any significant degree. Although classed as a 'hard rock' it is not used as a hard rock (for example road surface dressing), instead it is mainly used as a fill material, to raise levels of land prior to construction, or in the formation of embankments. Therefore, carstone is often used in the construction of roads. Crushed rock for asphalt production is imported into Norfolk mainly by rail as no indigenous material is suitable for this use.

1.9 Norfolk is a county rich in important wildlife and designated landscapes. There are 12 Special Protection Areas (SPAs), seven Special Areas of Conservation (SACs) and 162 Sites of Special Scientific Interest (SSSIs). Significant habitats include the Wash, the Broads, the Brecks and the Fens. The Norfolk Coast Area of Outstanding Natural Beauty (AONB) runs, with a few breaks, from King's Lynn in the west along the coast to Winterton in the east, and covers 450 square km. These designations often restrict the location of mineral activities.

2. Sand and Gravel

2.1 Production

2.1.1 Norfolk County Council carries out an annual survey for sand and gravel production, and the totals from this survey are included in this report. The totals for the last 10 years are shown in table 1 below:

Year	Production
2010	1,196,000
2011	1,289,000
2012	1,131,941
2013	1,114,935
2014	1,359,620
2015	1,414,959
2016	1,622,566
2017	1,604,973
2018	1,511,054
2019	1,328,907

Table 1: Sand and gravel 10-year sales 2010-2019

Source: Norfolk County Council - annual minerals survey

2.1.2 Sand and gravel is important as a construction aggregate and prior to the introduction of the NPPF and National Planning Policy Guidance it was planned using a system known as the Managed Aggregate Supply System. A key part of the MASS was an apportionment system for national need. A national requirement for sand and gravel was calculated, and this was then divided into sub-national requirements, which were in turn apportioned to individual MPAs as provision to be planned for.

2.1.3 Since the introduction of the NPPF, the MASS guidance has been cancelled and the national and sub-national requirements have become guidelines. These guidelines form part of the information relevant to the calculation of future demand in a Local Aggregate Assessment. The table below shows annual production as a proportion of the apportionment/guideline figure. It can be seen that the apportionment figure has not been met by production in the last 10 years, despite a number of workings having been mothballed during that time demonstrating that there was spare productive capacity.

Year	Apportionment/ guideline	Production	% Apportionment Produced
2010	2,980,000	1,186,000	39%
2011	2,570,000	1,289,000	50%
2012	2,570,000	1,131,941	44%
2013	2,570,000	1,114,935	43%
2014	2,570,000	1,359,620	53%
2015	2,570,000	1,414,959	55%
2016	2,570,000	1,622,566	63%
2017	2,570,000	1,604,973	62%
2018	2,570,000	1,511,054	59%
2019	2,570,000	1,328,907	52%

Table 2: Sand and Gravel production as a % of apportionment

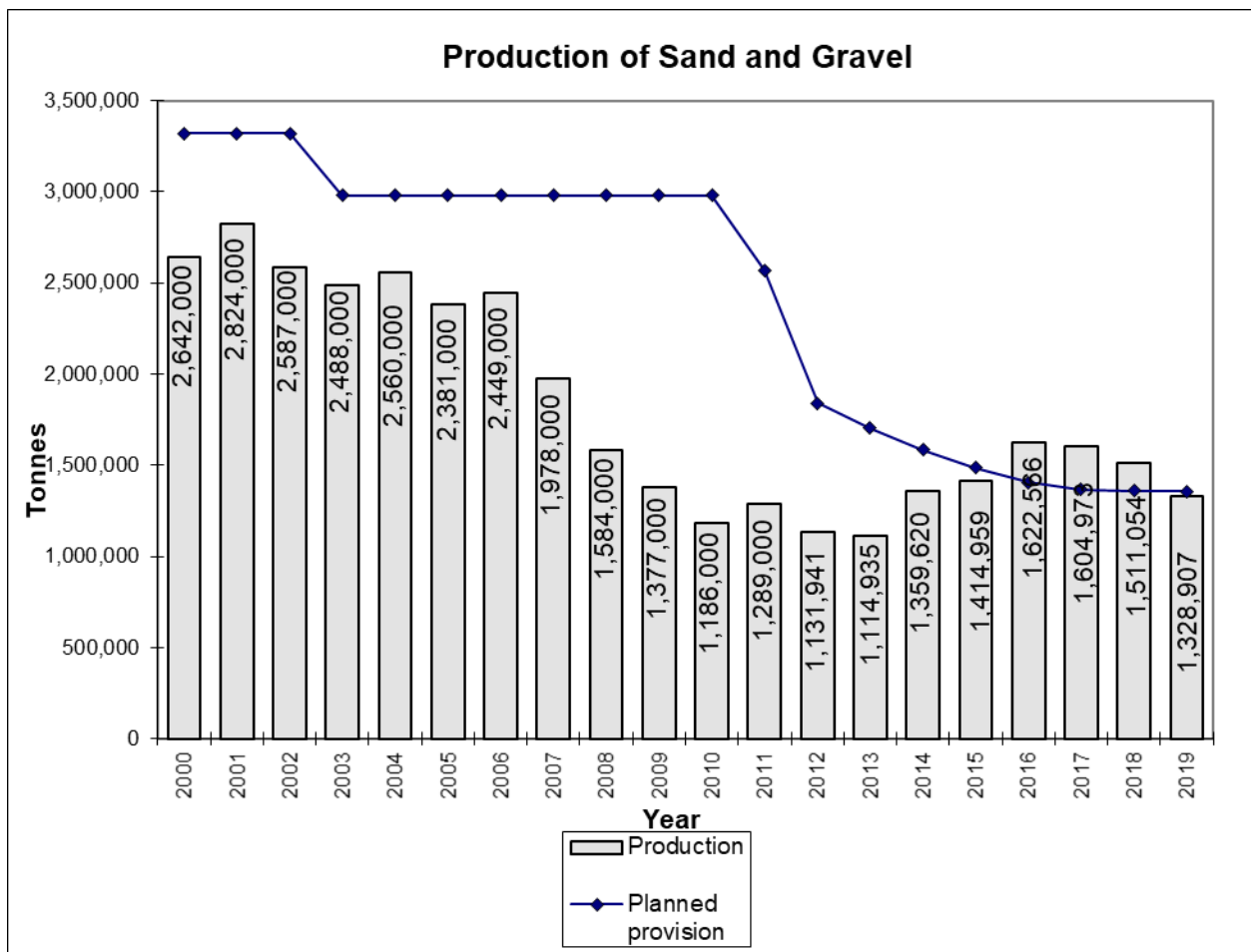


Figure 1: Sand and gravel sales 2000-2019

Source: Norfolk County Council – annual minerals survey.

2.1.4 Sand and gravel production in 2019 was 1,328,900 tonnes, representing a decrease of 12% on the 2018 figure. Production of sand and gravel continues to be below the average for the last twenty years of about 1.82 million tonnes (mt) per annum. **The average over the last 10 years was 1.356 million tonnes per annum.** The NPPG states that the 10-year rolling average is the starting point for the calculation of future demand for aggregate landbanks. The ten-year rolling average is falling, but at a decreased rate year on year, compared to the previous four reporting years.

Year	10-Year Average
2015	1.49 million tonnes
2016	1.41 million tonnes
2017	1.37 million tonnes
2018	1.36 million tonnes
2019	1.36 million tonnes

Table 3: 10-year rolling average of sand and gravel production for the last five years

2.1.5 The rolling 3-year average is 1.48 million tonnes (mt) per annum. This indicates a decrease for sand and gravel with this year's production reducing the 3-year average from 1.58 Mt to 1.48 Mt. However, it is still higher than each of the seven years from 2010 to 2016. The three-year rolling averages for the last 5 years are as follows:

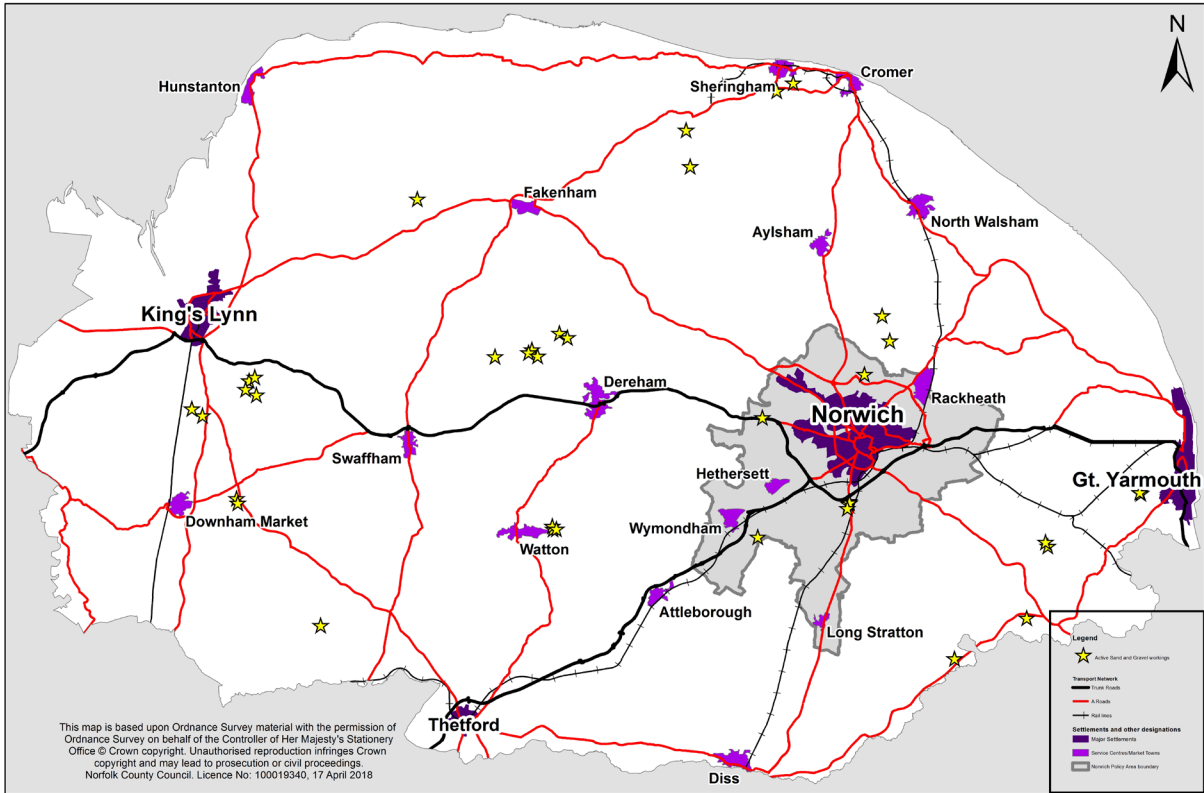
Year	3-Year Average
2015	1.29 million tonnes
2016	1.47 million tonnes
2017	1.55 million tonnes
2018	1.58 million tonnes
2019	1.48 million tonnes

Table 4: 3-year rolling average of sand and gravel production for the last five years

2.1.6 The NPPG suggests the use of 3-year average figures to indicate recent trends in sales. As can be seen from the table above, the rolling three-year average since 2015 has shown a general upward trend, with the three-year average for 2019 showing production levels above the 10-year average for 2019.

2.1.7 The NPPG suggests that the 10-year rolling average, 3-year rolling average and the sub-national guidelines should all be considered in order to establish a broad understanding of current and future mineral demand, especially during reviews of planned provision. The 20-year average annual production figure (2000-2019) was 1.822 million tonnes and covers a whole economic cycle (both growth and recession periods).

2.2 Active Sand and Gravel extraction sites in Norfolk in 2019



Map 2: Sand and Gravel extraction sites in Norfolk in 2019

Active Sand and Gravel extraction			
Parish	Operator	Address	End date of Permission
Beeston Regis	Carter Concrete	Britons Lane	22/02/2042
Burgh Castle	Folkes Plant	Butt Lane	31/12/2025
Carbrooke	Four Leaf Enterprises	Mill Lane	09/08/2027
Carbrooke	Frimstone Ltd	Summer Lane	09/08/2027
Crimplesham	Frimstone Ltd	Main Road	21/12/2022
Earsham	Earsham Gravels	Bath Hills Road	31/12/2020
East Beckham	Gresham Gravels	Holt Road	31/12/2031
East Bilney	Middleton Aggregates Ltd	Rawhall Lane	31/12/2026
East Rudham	Longwater Gravel Co Ltd	Coxford Abbey Quarry, Docking Road	20/05/2027
Feltwell	Lyndon Pallet Group	Lodge Road	22/02/2042
Horstead	Longwater Gravel Co Ltd	Grange Farm, Buxton Road, Horstead	31/12/2024
Horstead	Tarmac	Trafford Estate, Horstead	26/01/2023
Holt	Cemex	Ducks Hole Farm, Hunworth Road	31/12/2030
Kirby Cane	Lyndon Pallet Group	Leet Hill, Yarmouth Road	31/12/2025
Litcham	EAS (Plant Hire) Ltd	Punch Farm, Watery Lane	15/02/2035
Longham	McLeod Aggregates Ltd	Bittering Quarry, Reed Lane, Bittering	31/12/2032
Middleton	Middleton Aggregates Ltd	Mill Drove	26/01/2021
Middleton	William George Recycling	Mill Drove	31/12/2024
Pentney	Middleton Aggregates Ltd	Abbey Farm	31/12/2024
Raveningham / Norton Subcourse	Cemex	Loddon Road	20/02/2036
Spixworth	Tarmac	Grange Farm, Buxton Road	31/10/2020
Stody	Frimstone Ltd	Breck Farm, Melton Constable	31/03/2027
Swardeston	Tarmac	Mangreen Hall Farm	02/10/2023
Tottenhill	Frimstone Ltd	Watlington Road	31/12/2023
Wymondham	Longwater Gravel Co Ltd	Stanfield Road	30/03/2026

Table 5: Sand and Gravel extraction sites in 2019

2.3 Sand and gravel landbank of permitted mineral reserves

2.3.1 Four planning permissions were granted in 2019 for additional sand and gravel extraction: 285,000 tonnes at Tottenhill, 48,000 tonnes at Tottenhill, 440,000 tonnes at Beeston with Bittering and 130,000 tonnes at Edgefield (for the construction of an agricultural reservoir) which together add 903,000 tonnes of new permitted reserves to the landbank.

2.3.2 Reserves of sand and gravel at 31 December 2019 were 13,515,490 tonnes, an increase of 1.5% on the 2018 figure. In addition to the 0.903 million tonnes of reserve granted in planning permissions in 2019, there were also four planning applications for additional sand and gravel extraction in the process of being determined during 2019.

2.3.3 The Norfolk 'Core Strategy and Minerals and Waste Development Management Policies DPD', was adopted by the County Council in September 2011. Policy CS1 of the Core Strategy states that the sand and gravel landbank will be maintained at between 7 and 10-year's supply. An upper limit of 10 years was placed on the landbank in Norfolk to ensure the timely working and restoration of mineral workings. This is because of the nature of mineral working in Norfolk which is undertaken by fourteen operators across twenty-five sites.

2.3.4 The landbank at 31/12/2019, based on the 10-year average in the NPPF, was 9.96 years and therefore within the range for the landbank indicated in Policy CS1, and above the minimum target contained in national policy and guidance.

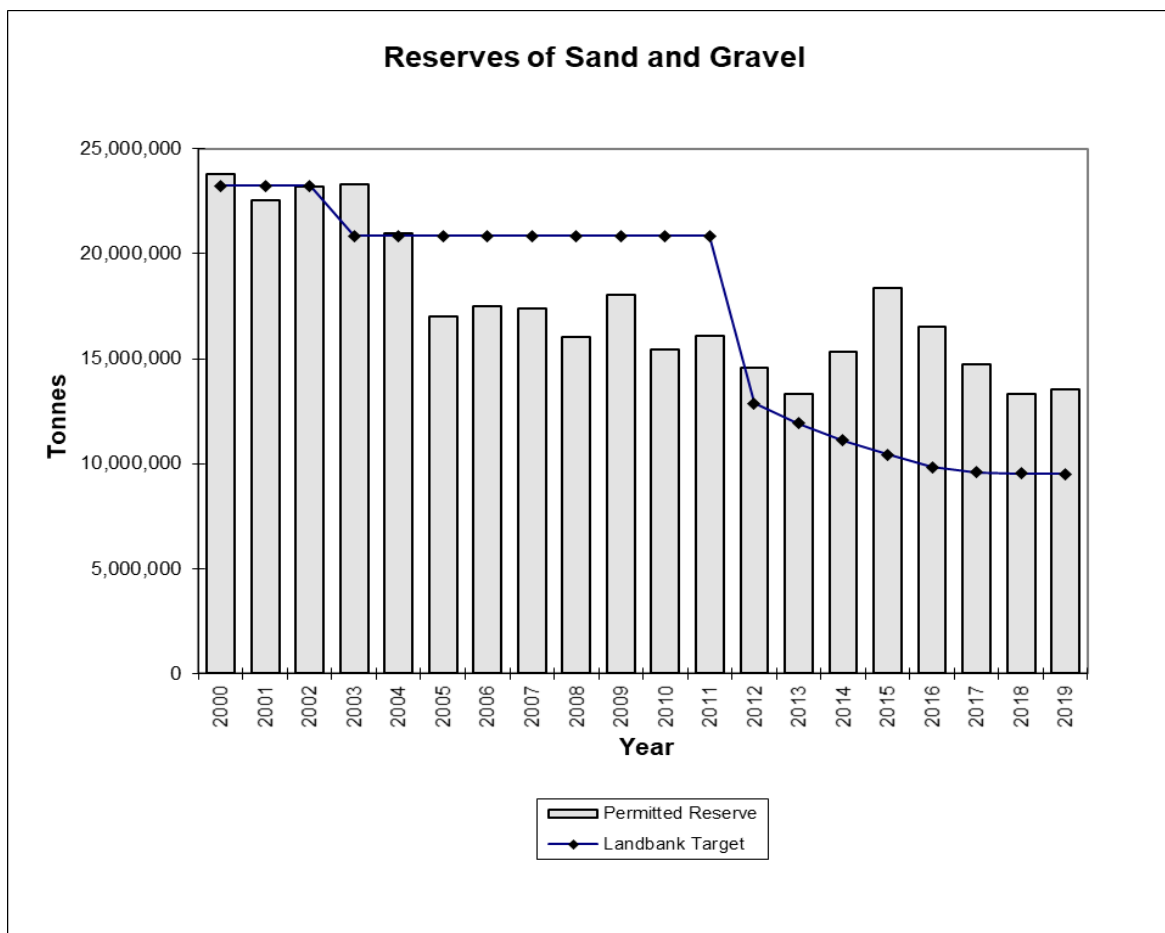


Figure 2: Sand and gravel reserves/landbank target

Source: Norfolk County Council – annual minerals survey

Permitted reserves (as at 31/12/19)	13,515,491 tonnes
10-year average sales	1,356,396 million tonnes
Resulting Landbank (years)	9.96

Table 6: Sand and gravel landbank calculation (Source: Norfolk CC – annual minerals survey)

2.3.5 Policy CS1 sought to provide for the planned provision of a steady and adequate supply of mineral, by indicating a requirement to make specific site allocations having regard to the sub-national guidelines (the apportionment), and the 10-year rolling average.

2.3.6 It is important to note that the landbank figures are, as stated in the NPPG, “principally a monitoring tool to provide a Mineral Planning Authority with early warning of possible disruption to the provision of an adequate and steady supply of land-won aggregates”. As landbanks relate to the provision of aggregates, a figure below 7 years for aggregate should be used as a trigger to determine whether a review of the Minerals and Waste Local Plan is required.

2.3.7 The Minerals Site Specific Allocations DPD allocated 26 sand and gravel sites which contained 2.5mt more than the total tonnage required in CS1, at the point of examination (March 2013). The estimated resource for the 26 sites was 27.51mt compared with a requirement based on policy CS1 of 25.04mt. Table 7 shows the status of all the sand and gravel specific site allocations in the adopted Minerals Site Specific Allocations DPD.

2.3.8 Norfolk County Council adopted the Minerals Site Specific Allocations DPD in October 2013. By the end of 2019 planning permission had been granted for 8.74Mt of sand and gravel extraction from allocated sites. Three of the allocated sites had received planning permission for only part of the site. All mineral planning applications submitted so far for allocated sites have been found suitable and granted permission.

2.3.9 This leaves an estimated further 18.851Mt of allocated sand and gravel resource which had not received planning permission at the end of 2019. However, the allocated sites in Shropham (MIN 108, MIN 109 and MIN 110) and Swardeston (MIN 79 and MIN 80) are no longer expected to be delivered; together these five sites are estimated to contain 3.21 Mt, which reduces the deliverable allocated sand and gravel resource which has not received planning permission to 15.64Mt.

2.3.10 As shown in Table 6, the permitted reserve was 13.515mt on 31/12/2019 and the sand and gravel landbank on 31/12/2019 was 9.96 years. The 10-year average sales of sand and gravel in the period to the end of 2019 were 1.356mt per annum. Based on this 10-year sales average, the remaining allocated sites (excluding those in Shropham and Swardeston) would provide 11.5 years of sand and gravel resource. This resource plus the existing permitted reserve would last 21.5 years; until 2040. Therefore, the permitted and allocated sites together would provide sufficient resources past the end of the adopted plan period (2026).

2.3.11 The Minerals and Waste Local Plan Review (M&WLPR) has commenced because five years have passed since the adoption of the Minerals SSA DPD, and the requirement for a review was specified in the adopted document. The M&WLPR will extend the Plan period to the end of 2036; this would coincide with the Plan period for all other emerging Local Plans in Norfolk. Of the remaining 19 sites allocated in the adopted Minerals Site Specific Allocations DPD, 14 were carried forward for

consideration into the review process, following confirmations of continued landowner willingness. A 'call for sites' was undertaken in 2017 and 24 additional sites for potential future sand and gravel extraction were submitted by landowners, mineral operators or agents, plus one further site submitted in response to the Initial Consultation.

2.3.12 The Initial Consultation document of the M&WLPR was subject to public consultation for six weeks in June-August 2018. In the Initial Consultation document, a total of 25 sites were proposed to be allocated as suitable for future sand and gravel extraction to meet the forecast need up to the end of 2036.

2.3.13 The Preferred Options document of the M&WLPR was subject to public consultation for six weeks in September-October 2019. In the PO document, a total of 20 sites were proposed to be allocated as suitable for future sand and gravel extraction to meet the forecast need up to the end of 2036. Two sites were withdrawn from the Local Plan process and one site received planning permission before the PO stage.

Location (parish)	Site reference	Permission granted	Allocated resources (tonnes)	31/3/2012-31/12/2019 Permitted reserve (tonnes)
Breckland				
Beetley	MIN 10	April 2015 (part of site)	2,400,000	680,000
Beetley	MIN 51		1,300,000	
Shropham	MIN 108	Sites not expected to be developed	150,000	
Shropham	MIN 109		400,000	
Shropham	MIN 110		150,000	
Snetterton	MIN 102		1,500,000	
Broadland				
Attlebridge	MIN 55		525,000	
Buxton with Lammas & Frettenham	MIN 37	Application submitted	1,450,000	
Felthorpe	MIN 48		1,900,000	
Horstead with Stanninghall	MIN 64	Nov 2012 (part of site)	950,000	350,000
Spixworth & Horsham St Faith & Newton St Faith	MIN 96		1,000,000	
King's Lynn and West Norfolk				
Pentney	MIN 19		700,000	
East Rudham	MIN 45	May 2014 (part of site)	3,600,000	1,560,000
Tottenhill	MIN 76	April 2019	285,000	285,000
Watlington	MIN 75	November 2015	335,000	335,000
North Norfolk				
Aylmerton	MIN 69	Application submitted	750,000	
East Beckham	MIN 84	August 2014	1,600,000	1,600,000
Holt	MIN 71		1,100,000	
North Walsham	MIN 115		1,100,000	
South Norfolk				
Heckingham & Norton Subcourse	MIN 83	February 2015	674,000	2,370,000
Heckingham & Norton Subcourse	MIN 91		1,146,000	
Norton Subcourse	MIN 90		511,000	
Stoke Holy Cross	MIN 81	October 2015	955,000	960,000
Stoke Holy Cross, Swainsthorpe & Swardeston	MIN 79	Sites not expected to be developed	1,750,000	
Swardeston	MIN 80		760,000	
Wymondham	MIN 118	January 2014	600,000	600,000
Total			27,591,000	8,740,000

Table 7: Status of sand and gravel site allocations Source: Norfolk County Council

3. Carstone

3.1 Production

3.1.1 Norfolk County Council carries out an annual survey for carstone production. The totals for the last 10 years are shown in table 4 below, and for the last 20 years in Figure 3 below:

Year	Production
2010	58,337
2011	62,308
2012	118,288
2013	37,193
2014	60,189
2015	67,320
2016	106,438
2017	97,578
2018	106,278
2019	39,878

Table 8: Carstone 10-year sales 2010-2019

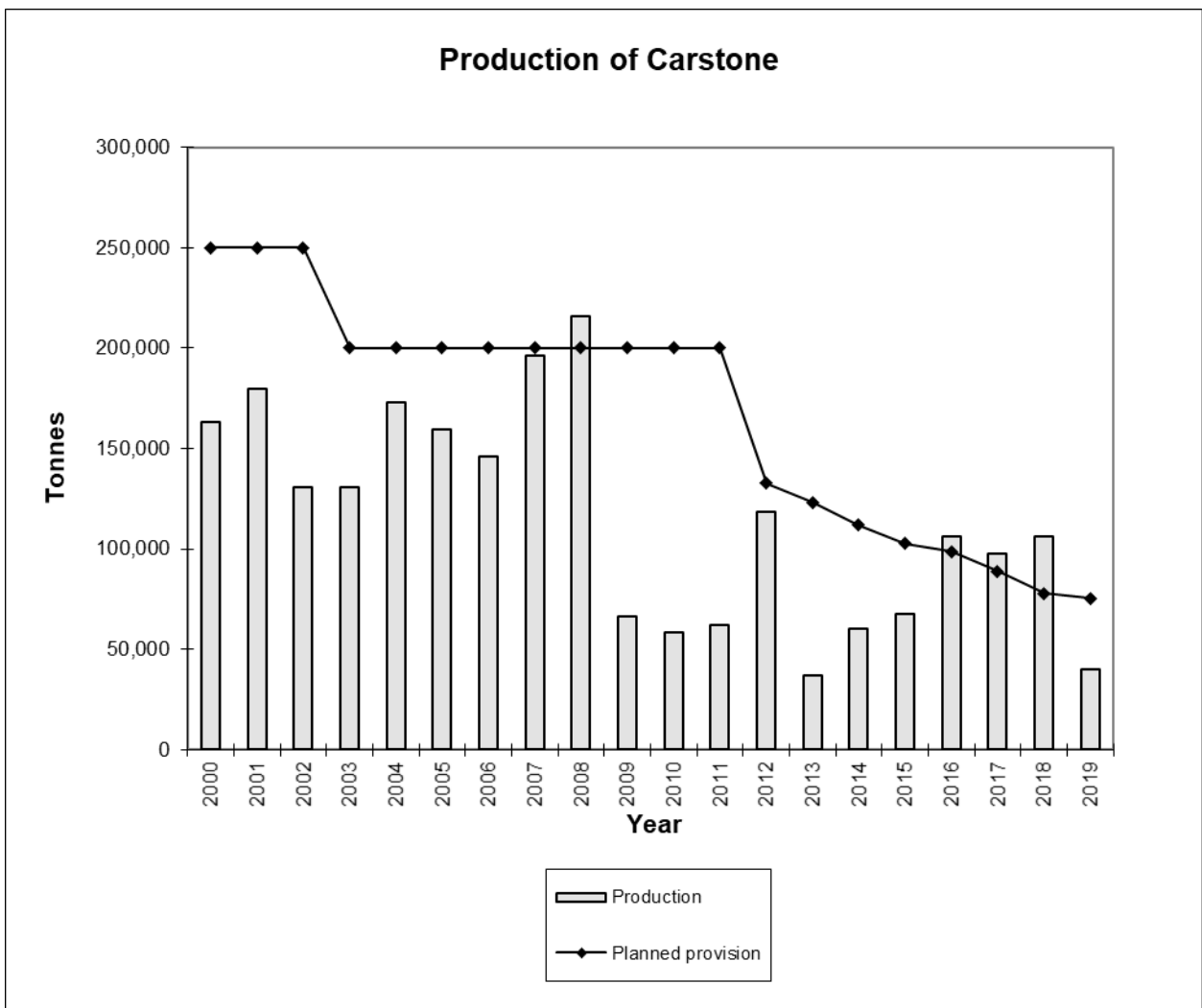


Figure 3: Carstone production 2000-2019

Source: Norfolk County Council – annual minerals survey.

3.1.2 Carstone production in 2019 was 39,878 tonnes, representing a decrease of 62.5% compared with the 2018 figure. This is below the average for the last twenty years (115,787 tonnes) and below the average for the last ten years (**75,381 tonnes**). The NPPG states that the 10-year rolling average should be used in the calculation of aggregate landbanks.

Year	10-Year Average
2015	102,801 tonnes
2016	98,839 tonnes
2017	88,958 tonnes
2018	78,023 tonnes
2019	75,381 tonnes

Table 9: 10-year rolling average of carstone production for the last five years

3.1.3 The rolling 3-year average is 81,245 tonnes per annum. The production of carstone is concentrated into relatively few workings and the production fluctuates significantly from year to year dependent on individual construction projects that require significant amounts of fill material, as can be seen in table 4 above. These fluctuations mean that the three-year rolling average can also vary significantly year to year. This means that it is of less value in helping to identify production trends for carstone compared with sand and gravel. The three-year rolling averages for the last 5 years are as follows:

Year	3-Year Average
2015	54,901 tonnes
2016	77,982 tonnes
2017	90,445 tonnes
2018	103,431 tonnes
2019	81,245 tonnes

Table 10: 3-year rolling average of carstone production for the last five years

3.1.4 The NPPG suggests that the 10-year average, 3-year average and the sub-national guidelines should all be had regard to in order to establish a broad view of mineral demand, especially during reviews of planned provision. The 20-year average annual production figure (2000-2019) was 115,787 tonnes and covers a whole economic cycle (both growth and recession periods).

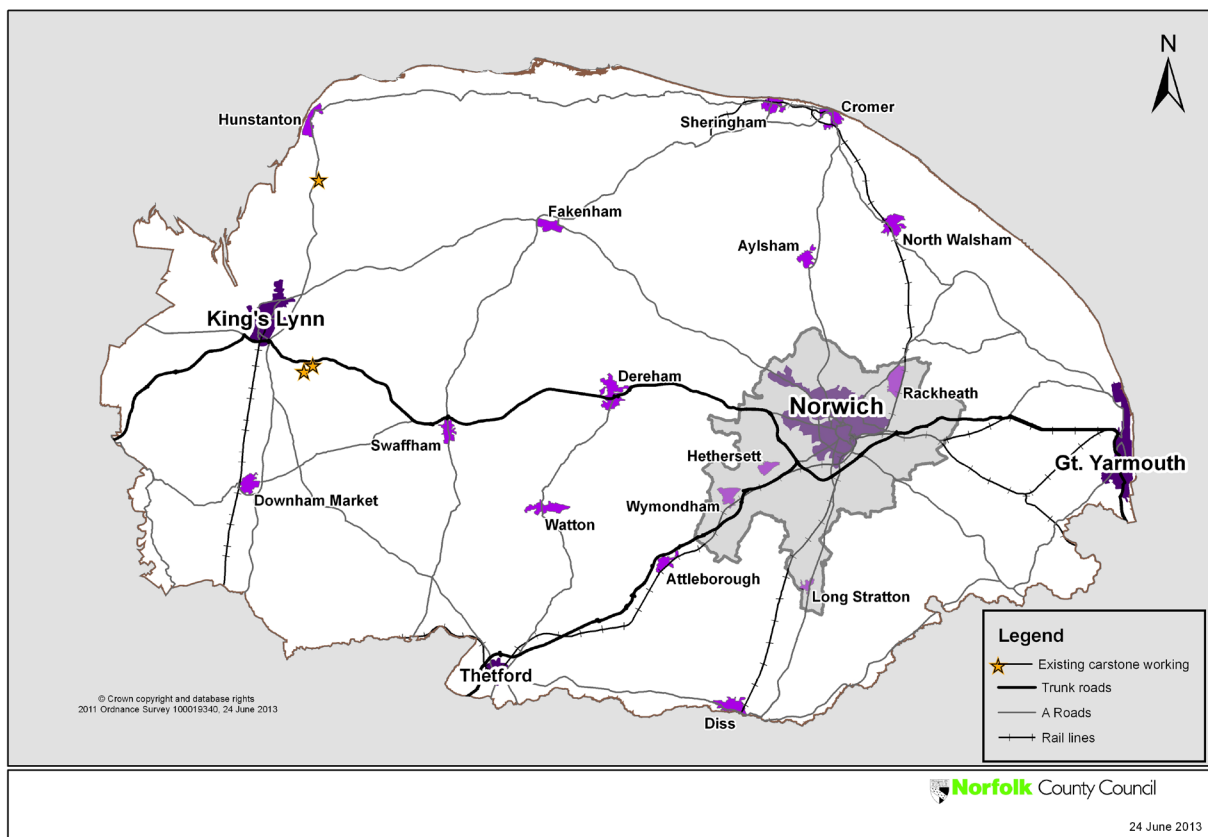
3.1.5 Carstone is mainly used as a construction aggregate, however prior to the introduction of the NPPF and National Planning Policy Guidance carstone was planned as part of the national hard rock requirement. A key part of the MASS was an apportionment system for national need. A national requirement for hard rock was calculated, and this was then divided into sub-national requirements, which were in turn apportioned to individual MPAs as provision to be planned for.

3.1.6 Since the introduction of the NPPF, the MASS guidance has been cancelled and the national and sub-national requirements have become guidelines. These guidelines form part of the information relevant to the calculation of future demand in a Local Aggregate Assessment. The table overleaf shows annual carstone production as a proportion of the apportionment/guideline figure. It can be seen that the apportionment figure has not been met by production in the last 10 years.

Year	Apportionment	Production	% Apportionment Produced
2010	200,000	58,337	29%
2011	200,000	62,308	31%
2012	200,000	118,288	59%
2013	200,000	37,193	19%
2014	200,000	60,189	30%
2015	200,000	67,320	33%
2016	200,000	106,438	53%
2017	200,000	97,578	49%
2018	200,000	106,278	53%
2019	200,000	39,878	20%

Table 11: Carstone production as a % of apportionment

3.2 Carstone extraction sites in Norfolk



Map 3: Carstone extraction sites in Norfolk in 2019

Carstone Extraction			
Parish	Operator	Address	End date of Permission
Middleton	Middleton Aggregates	West of Mill Drove	17/10/2026
Middleton	Middleton Aggregates	East of Mill Drove	22/08/2022
Snettisham	Frimstone	Norton Hill	04/09/2028

Table 12: Carstone extraction sites in Norfolk in 2019

3.3 Carstone landbank of permitted mineral reserves

3.3.1 Reserves of Carstone at 31 December 2019 were 1,721,000 tonnes which represents a decrease of 6.7% from 2018 figures. No planning applications for carstone extraction were received in the year 2019; and no new planning permissions were granted for carstone extraction.

3.3.2 The Norfolk 'Core Strategy and Minerals and Waste Development Management Policies DPD', was adopted by the County Council in September 2011. Policy CS1 of the Core Strategy states that carstone will be maintained at 10 years' supply. The landbank at 31/12/2019 calculated on the 10-year rolling average sales, as set out in the NPPF was 22.83 years, above the figure for the landbank indicated in Policy CS1, and national guidance.

3.3.3 It is important to note that the landbank figures are, as stated in the NPPG, "principally a monitoring tool to provide a Mineral Planning Authority with early warning of possible disruption to the provision of an adequate and steady supply of land-won aggregates". As landbanks relate to the provision of aggregates, a figure below 10 years for crushed rock should be used as a trigger to determine whether a review of the Minerals and Waste Local Plan is required.

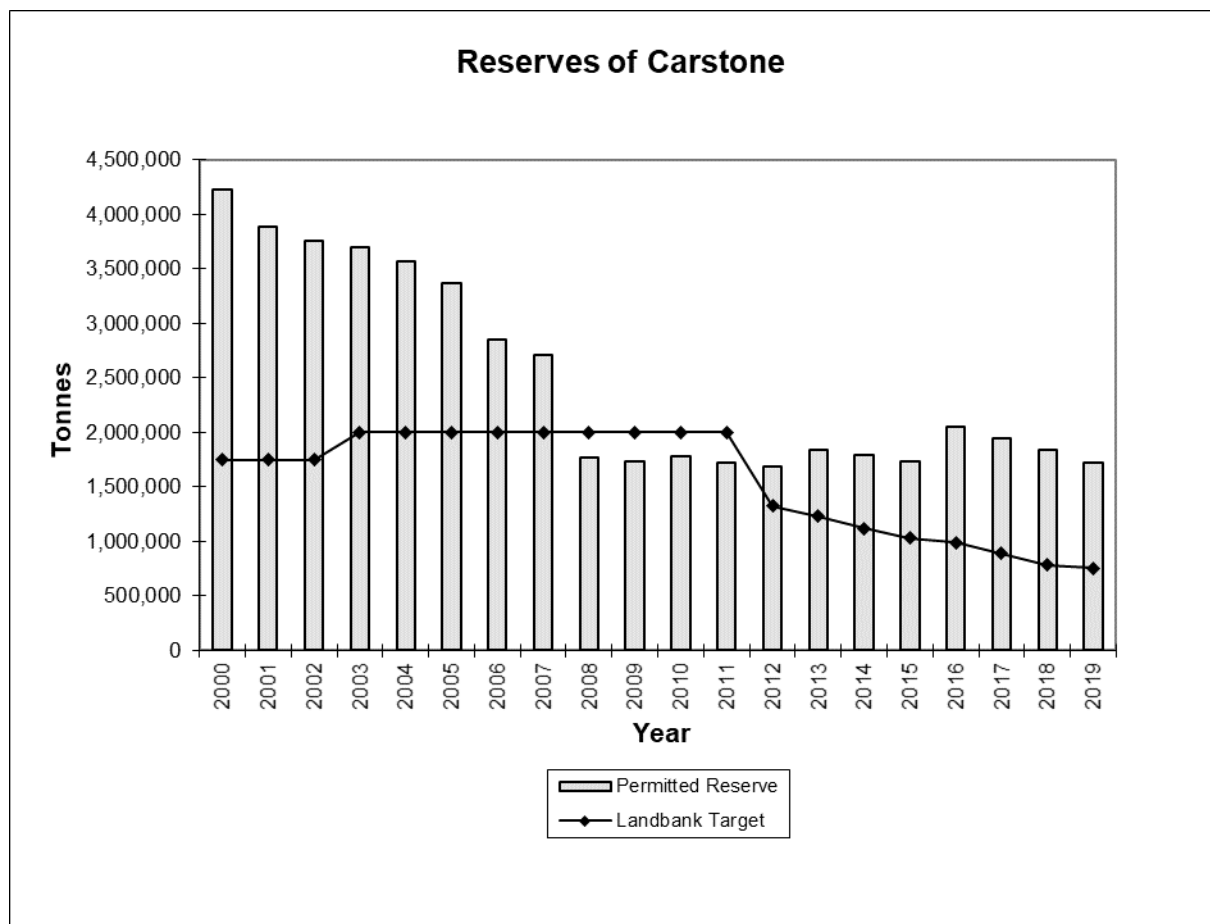


Figure 4: Carstone reserves/landbank target 2000-2019
Source: Norfolk County Council – annual minerals survey.

	Carstone
Permitted reserves (as at 31/12/19)	1,721,000 tonnes
10-year average	75,381 tonnes
Landbank (years)	22.83

Table 13: Carstone Landbank calculation

Source: Norfolk County Council – annual minerals survey.

3.3.4 The Minerals Site Specific Allocations DPD allocated one carstone site which contained 0.14mt more than the total tonnage required in CS1, at the point of examination (March 2013). The estimated resource for the site was 1.42mt compared with a requirement based on policy CS1 of 1.28mt.

3.3.5 Norfolk County Council adopted the Minerals Site Specific Allocations DPD in October 2013. By the end of 2019 no planning application had been submitted for the extraction of carstone at the allocated site.

3.3.6 Therefore, 1.42 mt of allocated carstone resource remains at the end of 2019. No planning applications were in the process of being determined for allocated carstone resources.

3.3.7 As shown in Table 14, the permitted reserve was 1.721mt on 31/12/2019 and the carstone landbank on 31/12/2019 was 22.83 years. The 10-year average sales of carstone in the period to the end of 2019 was 75,381 tonnes per annum. Based on this 10-year sales average, the remaining allocated site would provide 18.8 years of carstone resource. This resource plus the existing permitted reserve would last until 2060. Therefore, the permitted and allocated sites together would provide sufficient resources past the end of the plan period (2026).

3.3.8 The Minerals and Waste Local Plan Review has commenced because five years have passed since the adoption of the Minerals SSA DPD, and the requirement for a review was specified in the adopted document. The Mineral and Waste Local Plan Review will extend the Plan Period to the end of 2036; this would coincide with the Plan period for all other emerging Local Plans in Norfolk. The site allocated in the adopted plan, has been carried forward into the review following a confirmation of continued landowner willingness. A 'call for sites' was also undertaken in 2017 however no additional sites for potential future carstone extraction were submitted by landowners, mineral operators or agents.

3.3.9 The Initial Consultation document of the Minerals and Waste Local Plan Review was subject to public consultation for six weeks during June-August 2018, the site allocated in the current adopted plan was proposed to be allocated as suitable for future carstone extraction to meet the forecast need up to the end of 2036.

3.3.10 The six-week Preferred Options Consultation took place during September-October 2019 and the site allocated in the current adopted plan continues to be considered suitable to allocate for future carstone extraction to meet the forecast need up to the end of 2036.

4. Secondary and recycled aggregate

Note: the data in this section is for 2018 and has not been updated for 2019

In addition to its resources of land won aggregates, secondary and recycled aggregates are also sourced within Norfolk:

Secondary aggregates are by-product wastes e.g. power station ash and colliery spoil that can be used for industrial and low-grade aggregate purposes, either solely or when mixed with primary aggregates.

Recycled aggregates are aggregates produced from recycled construction waste such as crushed concrete, planings from road surfacing etc. Secondary and recycled aggregates can replace primary materials for many uses.

Data for the production of recycled and secondary aggregates is limited, and less reliable than that for other types of aggregate. This part of the assessment reviews the recent reported levels of recycled and secondary aggregate production and the reliability of data to establish whether it would be feasible to reduce the amount of land won mineral required.

4.1 Overall inert and Construction/Demolition waste management figures in Norfolk

4.1.1 It is estimated that in 2018/19 over 494,000 tonnes of the inert and construction/demolition waste, received at transfer stations and recycling centres, was recovered. This is an increase of 76,000 tonnes on the 2017/2018 figure of 418,000 tonnes and was due to an increase in material being used for quarry restoration. This figure includes waste recovered at quarries, and sold as recycled aggregates, as well as waste management facilities.

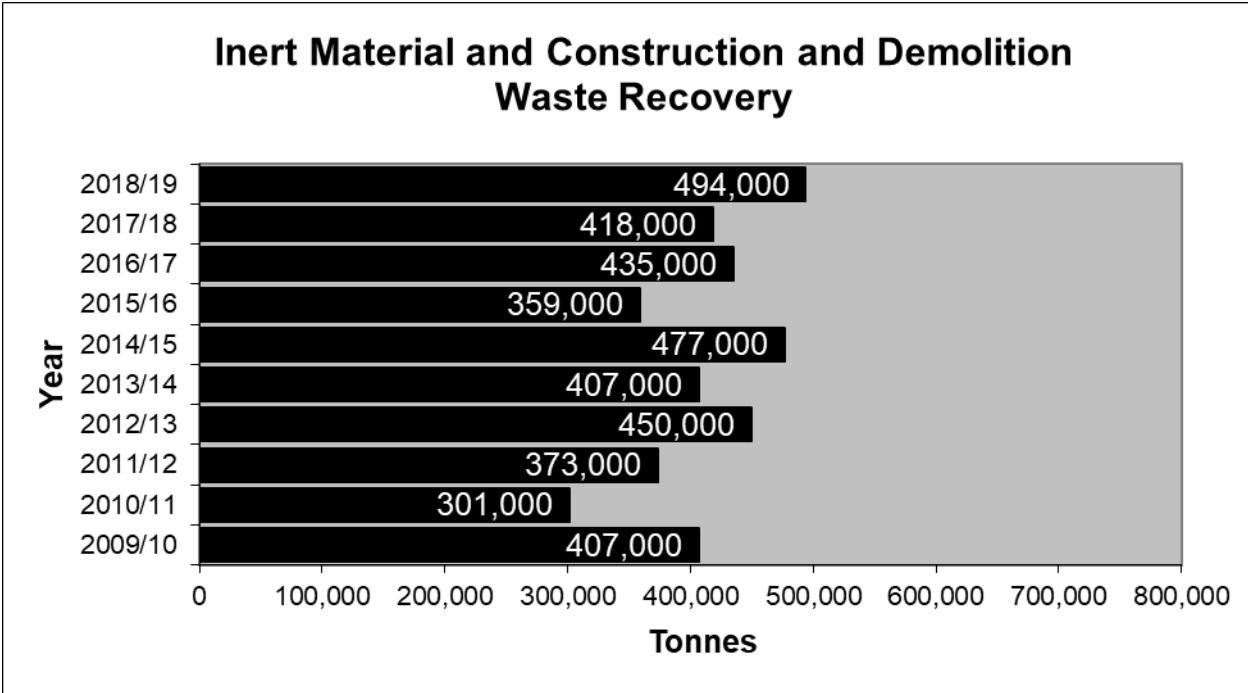


Figure 5: Inert Material and Construction/Demolition Waste Recovery
Source: Norfolk County Council – annual waste survey/ Environment Agency returns.

4.1.2 The 10-year average figure for inert material and construction/demolition waste recovery is **412,100 tonnes per annum**. This was a small decrease on the ten-year rolling average for 2017/2018 of 413,900 tonnes per annum. This small decrease is as a result of another high year from the previous housing boom being removed, although this is the last of the boom years preceding the recession. The rolling 3-year average for 2018/2019 is approximately **449,000 tonnes per annum**. This is an increase on the 3-year average for the previous year, which was 404,000 tonnes per annum. It should be noted that the quantity of inert material and C&D waste reported through waste management facilities excludes that which is used directly on site in place of aggregate. The quantity of inert and C&D waste used directly on site is unreported and therefore cannot be included in the data on secondary and recycled aggregates.

4.1.3 It is difficult to establish the percentage of the recovered material that can be sold as recycled aggregate. Construction Demolition Excavations Waste (CDEW) comprises a range of materials, of which the “hard” elements (e.g. concrete, bricks, stone, road planings, rail ballast and glass) can be recycled for use as aggregates. Other elements of CDEW; due to their “soft” and/or organic nature; (e.g. soil, timber and plasterboard) are unsuitable for aggregate use. There is also a risk for double counting with some of the figures where waste is handled at more than one facility. It is estimated that there are approximately 450,000 tonnes of capacity for inert recycling at permitted waste management facilities; there is also additional capacity at mineral workings as ancillary operations.

4.2 Recycling Aggregate at Mineral Workings

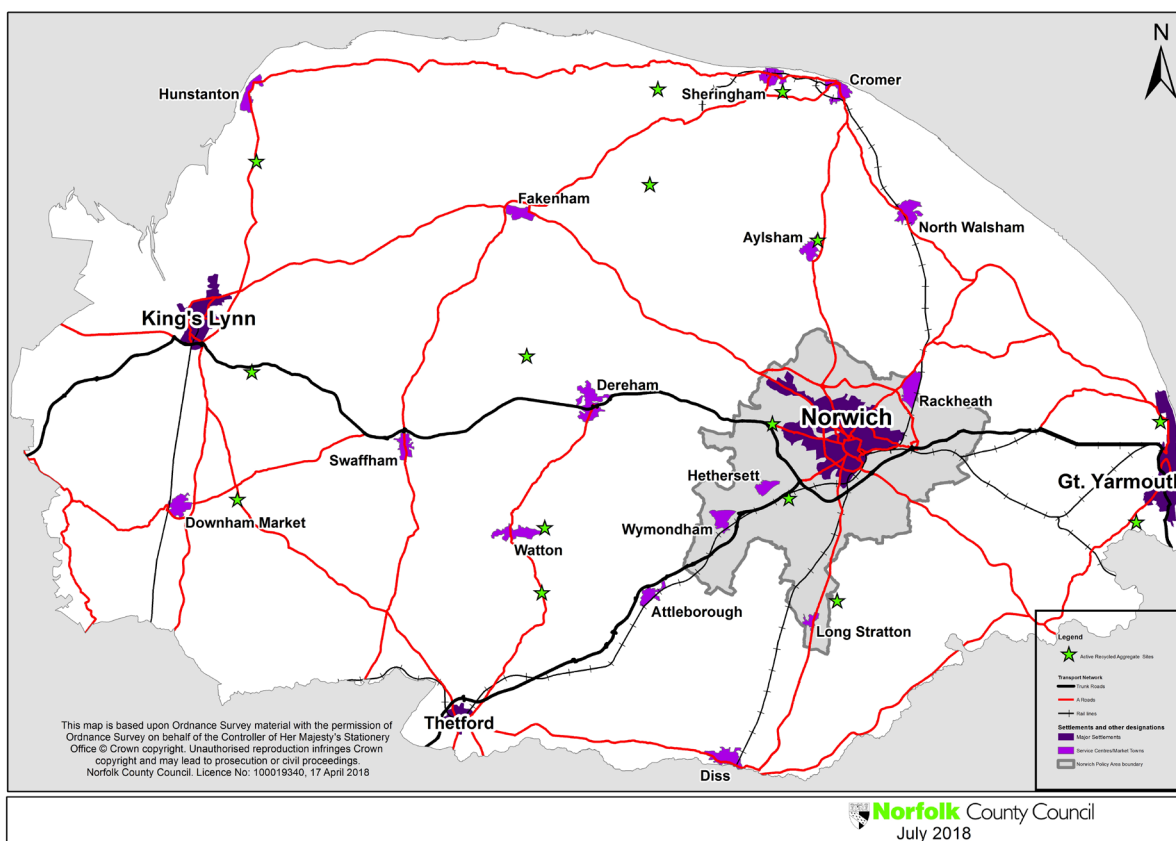
4.2.1 Information about the amount of material from recycling aggregate as an ancillary operation at minerals workings is variable. The figure which has been included in the overall quantities of material recovered includes sales figure of recycled material leaving the quarry site, and material used in quarry restoration. This is the eleventh year (2018) that this figure has been reported, however, there does not seem to be any positive correlation shown in the data between recycled aggregate quantities and construction activity. It may be that the quantities of recycled aggregate are more dependent on both the type of site developed and construction activity, rather than just the amount of construction activity. It is estimated that there is approximately 500,000 tonnes of capacity for recycled aggregate at mineral workings as an ancillary operation.

4.3 Secondary and Recycled Aggregate Sources

4.3.1 The table below only includes sites that deal with inert waste / secondary and recycled aggregates. Sites which accept both inert and non-inert wastes are not included in the table, although waste received at those sites is included in the figures of recycled and secondary aggregates.

Company	Location
Aylsham Plant Hire Ltd	Aylsham
Richardson Recycling Ltd	Morningthorpe
Carter Concrete	Beeston Regis
Childerhouse, Mr R	Breckles
E E Green & Son	Great Yarmouth
Frimstone Ltd	Snettisham
Frimstone Ltd	Carbrooke
Frimstone Ltd	West Dereham
Frimstone Ltd	Buxton
Frimstone Ltd	Crimplesham
Glaven Pits Ltd	Letheringsett
Highways Contractors	West Caister
Longwater Gravel Co Ltd	Coxford Abbey Quarry, East Rudham
Middleton Aggregates Ltd	Middleton
Middleton Aggregates Ltd	Ketteringham
Middleton Aggregates Ltd	Beetley
Morrissey Builders	Melton Constable
Mr Rounce	Aylmerton
R & C Bettinson	Heywood
R G Carter	Costessey
T Farrow Construction	Bergh Apton

Table 14: Secondary and Recycled Aggregate Sources in 2018-2019



Map 4: Secondary and recycled aggregate sources in Norfolk over 20,000 tonnes per annum

5. Materials sourced outside the County

5.1 Imports and exports

5.1.1 Quantifying intra county imports and exports has been a longstanding issue. However, the 2014 Aggregate Minerals Survey (AM2014), undertaken jointly between the Department for Communities and Local Government (DCLG) and the British Geological Survey (BGS) provided broad land-won sand and gravel import and export figures for MPAs/ regions. The data within the AM 2014 along with additional information obtained through direct correspondence with the BGS has enabled the County Council to achieve a better understanding of the situation regarding imports and exports. Norfolk is a net importer of crushed rock, and a net exporter of sand and gravel.

5.2 Crushed Rock

5.2.1 Norfolk, due its geology, relies on importation for the majority of its crushed rock (carstone is the only indigenous source and is not suitable for asphalt production, due to its composition). A significant proportion of this material is imported by rail into Norwich. Other railheads are located at Snetterton and Brandon although these are significantly smaller in scale and volumes than those in Norwich. There are also landings of crushed rock at the Great Yarmouth Outer Harbour. Just under 785,000 tonnes of crushed rock was imported via railheads and wharves into Norfolk in 2019.

5.2.2 The Collation of the Results of the 2014 Aggregate Minerals Survey for England and Wales the (AM2014) indicated that the East of England (4.7 Mt) is one of the main importing regions and that the East Midlands and South West have the largest export figures representing 58 per cent (16.4 Mt), 27 per cent (5.6 Mt) of their respective total crushed rock sales.

5.2.3 Of the total crushed rock consumed in Norfolk (308,000 tonnes) (Table of primary aggregates by sub-region in AM2014):

- 60-70% came from quarries within Leicestershire.
- 10-20% came from Norfolk (carstone).
- 10-20% came from Shropshire.
- Cornwall, Cambridgeshire, Derbyshire, Peak District National Park, Yorkshire Dales National Park, Northumberland National Park, and Powys each supplied less than 1%.

Source: Table of primary aggregates by sub-region from the 2014 aggregate minerals survey for England and Wales & British Geological Survey (BGS).

5.3 Sand and Gravel

5.3.1 Norfolk, due to its geology, has considerable sand and gravel resources. The relative weight and value of sand and gravel means that this mineral does not normally travel significant distances, and a number of cross-boundary movements are likely to be as a result of the proximity of mineral workings to the market and therefore transport costs, regardless of their relationship to any administrative boundary, or lack of potential supply in another area. Neighbouring Mineral Planning Authorities plan to supply the demand in their own areas, by allocating sites, and therefore Norfolk does not need to make planned provision to supply additional aggregates.

5.3.2 Imports of sand and gravel

Of the total 1,341,000 tonnes of land-won sand and gravel consumed in Norfolk (Table of primary aggregates by sub-region in AM2014):

- 80-90% came from quarries within Norfolk.
- Suffolk supplied between 1-10%.
- Cambridgeshire supplied between 1-10%.
- Devon, Central Bedfordshire, Peterborough, Lincolnshire and Staffordshire each supplied less than 1%.

5.3.3 Exports of sand and gravel

Of the total sales of 1,148,000 tonnes sand and gravel produced in Norfolk (Table 2 in AM2014):

- 20-30% of Norfolk's production was exported somewhere in the East of England.
- 10-20% of Norfolk's production was exported to Suffolk.
- Less than 1% of Norfolk's production was exported to Cambridgeshire and Peterborough, Essex, Southend and Thurrock, Derbyshire and Peak National Park, Leicestershire and Rutland, Lincolnshire, Northamptonshire, Cumbria and Lake District National park.

It is considered that there is a degree of double counting regarding these figures and that it seems likely that some of the amount attributed to being consumed somewhere in the East of England was consumed in Norfolk and not exported.

Source: Table of primary aggregates by sub-region of the 2014 aggregate minerals survey for England and Wales

5.4 Marine sources

5.4.1 The last estimate of the total marine sand and gravel consumed in Norfolk was less than 500 tonnes (Table 2 in AM2014):

- This represents much less than 1% of total sand and gravel (both land-won and MSG) for Norfolk

Source: Table 2 of the 2014 aggregate minerals survey for England and Wales & British Geological Survey (BGS).

6. Supply and Demand Assessment

6.1 Supply

6.1.1 The NPPF paragraph 145 states that “...minerals planning authorities should plan for a steady and adequate supply of aggregates,” based on a rolling average of 10 years sales data, other relevant local data and an assessment of all supply options. The sand & gravel and carstone quarries in the Norfolk and the recycling sites have been listed in the previous section of the report. The total sales of aggregates in Norfolk are shown in table 7 below.

Year	Sand & Gravel	Carstone	Inert and Construction Demolition Waste recovered ¹	Imports		Marine
				Crushed Rock	Sand and Gravel	
2010	1,186,000	58,337	301,000	No available information		
2011	1,289,000	62,308	373,000	439,000	100,000	1,000
2012	1,132,000	118,288	450,000	No available Information		
2013	1,114,000	37,193	407,000	No available Information		
2014	1,359,620	60,189	477,000	271,000	193,000	Less than 500
2015	1,414,959	67,320	359,000	No available Information		
2016	1,622,566	106,438	435,000	No available Information		
2017	1,604,973	97,578	418,000	No available Information		
2018	1,511,054	106,278	494,000	No available Information		
2019	1,328,907	39,878	not updated	No available Information		
Average 2010-19	1,356,308	75,381	not updated	No available Information		

Table 15: Total aggregate sales in Norfolk

Source: Norfolk County Council – annual surveys/Environment Agency returns/ BGS AM2014 (rounded).

1 – This figure contains a proportion of material which will be suitable for reuse as secondary and recycled aggregate

Sand and gravel supply

6.1.2 The data in section 2.3 shows that the sand and gravel landbank of permitted reserves equates to 9.96 years at the end of 2019, which is above the 7-year minimum target for permitted reserves required by the NPPF. Norfolk County Council has also allocated sufficient land in the adopted Minerals Site Specific Allocations DPD to ensure provision of a steady and adequate supply of aggregate for the county up to the end of 2026. The Minerals and Waste Local Plan Review which has commenced will, on adoption, ensure a steady and adequate supply of sand and gravel for Norfolk up to the end of 2036. Imports of sand and gravel into Norfolk are significantly less than exports.

Carstone supply

6.1.3 The data in section 3.3 shows that the carstone landbank of permitted reserves equates to 22.83 years which is above the 10-year target for permitted reserves required by the NPPF. Norfolk County Council has also allocated sufficient sites in the Minerals Site Specific Allocations DPD to meet the provision of a steady and adequate supply of carstone required for the county up to the end of 2026.

6.1.4 The Minerals and Waste Local Plan Review which has commenced will, on adoption, ensure a steady and adequate supply of carstone for Norfolk up to the end of 2036.

6.1.5 There are significant imports of crushed rock into Norfolk due to the unsuitability of Norfolk's carstone for more demanding uses.

6.1.6 The Council is therefore satisfied that an adequate and steady supply of minerals covered by this Local Aggregate Assessment will be met by the permitted reserves up to the end of the adopted Plan period in 2026. Any potential increase in demand would be met by the adopted Minerals Site Specific Allocations.

Minerals and Waste Local Plan Review

6.1.7 Norfolk County Council commenced the planned review of the Minerals and Waste Local Plan in 2017. The review will extend the Plan period to 2036, and as part of the process consideration will be given to the need for new allocations to provide an adequate and steady supply of minerals up to the end of 2036. A 'call for sites' was undertaken in 2017 and 24 additional sites for potential future sand and gravel extraction were submitted by landowners, mineral operators or agents, plus one further site submitted in response to the Initial Consultation.

6.1.8 The Initial Consultation document of the Minerals and Waste Local Plan Review was subject to public consultation for six weeks during June-August 2018, a total of 25 sites were proposed to be allocated as suitable for future sand and gravel extraction, and one site is proposed to be allocated as suitable for future carstone extraction to meet the forecast need up to the end of 2036.

6.1.9 The six-week Preferred Options consultation on the Minerals and Waste Local Plan Review took place during September/October 2019, a total of 20 sites were proposed to be allocated as suitable for future sand and gravel extraction, and one site is proposed to be allocated as suitable for future carstone extraction to meet the forecast need up to the end of 2036.

6.2 Demand

Population & housing growth

6.2.1 Forecasts produced by Office of National Statistics indicate that the Norfolk's population is likely to grow from 903,680 in 2018 to 1,001,226 in 2036 an increase of 10.8%. Accommodating this forecast population increase will be achieved through development planned for by Norfolk's Local Planning Authorities. The Planning Authorities in Norfolk have agreed that adopted Plan reviews will extend the end dates of future Plans to at least 2036.

6.2.2 The Greater Norwich Growth Board (GNGB) is the body through which Broadland District Council, Norwich City Council, South Norfolk Council, Norfolk County Council, and the Broads Authority are working together to manage the delivery of growth. In the period between 2001 and 2026 the area is planning for 42,000 new dwellings (there have been 30,085 completions up to 2019) and 27,000 new jobs in the period between 2008 and 2026. The quantities to be planned for are contained in the adopted Joint Core Strategy for Broadland, Norwich and South Norfolk 2011 (with amendments adopted in 2014).

6.2.3 Broadland District Council, Norwich City Council and South Norfolk Council are currently producing a new Greater Norwich Local Plan and a Draft Strategy and Sites Plan was published for public consultation in February/March 2020. The Greater Norwich Local Plan will cover the period from 2018 to 2038 and the Draft Strategy is proposing to deliver 44,343 new dwellings during the plan period.

6.2.4 Breckland District Council is planning for no less than 15,298 new homes in the period between 2011 and 2036 (3,493 completions have already taken place between

April 2011 and March 2018). The quantities to be planned for are contained in the adopted Breckland Council Local Plan 2019.

6.2.5 Great Yarmouth Borough Council's strategy is planning for 7,140 dwellings over the period between 2013 and 2030. The quantities to be planned for are contained in the adopted Great Yarmouth BC Core Strategy 2015. Great Yarmouth Borough Council is currently producing its Local Plan Part 2 which was submitted for independent examination in July 2020. The Local Plan Part 2 is planning for a lower housing need of 5,303 new homes over the period from 2013 and 2030. There have already been 1,310 dwelling completions between 2013 and 2019.

6.2.6 The Borough Council of King's Lynn and West Norfolk is planning for 16,533 dwellings (there have been 9,705 completions up to 2018) in the period between 2001 and 2026 and 5,000 jobs (2001-21). The quantities to be planning for are contained in the adopted KL&WN BC Core Strategy 2011. The Borough Council is currently producing a new Local Plan and a draft was published for public consultation in March/April 2019. This draft Local Plan was proposing to deliver 12,765 dwellings over the plan period from 2016-2036. There have already been 779 dwelling completions between 01/04/2016 and 30/03/2018.

6.2.7 North Norfolk District Council is planning for 8,000 dwellings and 4,000 jobs in the period between 2001 and 2021 (there were 6,931 dwelling completions between 2001 and 2019). The quantities to be planned for are contained in the adopted North Norfolk Core Strategy 2008. North Norfolk District Council is currently producing a new Local Plan for the period 2016-2038 and consulted on a first draft in May / June 2019. In the First Draft the new Local Plan was proposing to deliver between 10,500-11,000 new homes over the plan period. There have already been 1,200 dwelling completions between 01/04/2016 and 30/01/2019.

6.2.8 The completion rates and new planned housing numbers contained in more recent Local Plans show that there remains a number of new dwellings to be built between now and the end of the plan period. These new dwellings will all require aggregate materials for their construction, although modern methods of construction use considerably less aggregate than methods used in previous decades, and this decline in the intensity of aggregate use has been a continuing trend over a number of years.

6.2.9 Housing development is key to meeting the growth requirement in plans and is generally accompanied by other types of development such as roads, drainage, schools, health facilities, employment and retail. In addition, housing and related developments involving the use of alternative aggregates as well as primary aggregates.

Exports of Sand and Gravel

6.2.9 Norfolk is a net exporter of sand and gravel, although it is considered that a significant number of these exports are likely to be as a result of transport costs, due to the proximity of a sand and gravel working in Norfolk compared with one in the neighbouring county. However, as neighbouring Mineral Planning Authorities plan to supply the demand in their areas suitable resources are allocated within these areas to meet this demand, and it does not need to be planned for in Norfolk.

Infrastructure projects

6.2.10 There are a number of key infrastructure projects planned in the County to support the anticipated level of growth. These projects are contained in the Norfolk Strategic Infrastructure Delivery Plan and include:

Project type	Project name
Roads	Great Yarmouth Third River Crossing
	Broadland Growth Triangle Link Road
	Attleborough Link Road
	A10 West Winch Housing Access Road
	A140 Long Stratton Bypass
	Fakenham A148 roundabout enhancement
	Norwich Western Link
	A11 Thetford bypass junctions
	A47 Wisbech bypass junctions
	A47 Tilney to East Winch dualling
	A47 Acle Straight dualling
	A47 Thickthorn and Great Yarmouth junction improvements
	A47 dualling Blofield to North Burlingham
	A47 dualling Easton to North Tuddenham
Utilities	Thetford energy supply
	Attleborough energy supply
	Snetterton Heath energy supply
	Sprowston Primary and Peachman Way Primary substations
	Earlham sub-stations
	Cringleford Primary Substation
	Broadland Growth Triangle trunks sewer
	Wymondham water supply connections
	King's Lynn sewerage improvements
	Thetford Water Supply
	Thetford sewerage scheme
Easton, Hethersett and Cringleford sewerage upgrade	
Rail	Broadland Business Park Rail Station
	Great Yarmouth Rail Station
	Norwich to London Rail
Schools	Broadland Growth Triangle Secondary School
	Three primary schools at Thetford
	Two primary schools at Rackheath
	Three primary schools within North Norwich Growth Triangle
	Two primary schools at Attleborough
	Two primary schools at West Winch
Regeneration	East Norwich Regeneration Area
	Great Yarmouth Operations & Maintenance Campus
	Anglia Square, Norwich

Table 16: Infrastructure projects planned in Norfolk

6.3 Conclusion

6.3.1 Norfolk's share of the sub-national guideline figures (the apportionment) for sand and gravel of 2.57 million tonnes per annum and carstone of 0.2 million tonnes per annum represent higher figures than the locally derived figures. These higher figures were used in Core Strategy Policy CS1 as the basis for allocations to plan for the provision of a steady and adequate supply of aggregate and provide flexibility.

6.3.2 Average annual 10-year sales of 1.36 million tonnes for sand and gravel and 75,381 tonnes for carstone (as at 31/12/19) have been derived from a sales-based assessment compliant with the NPPF and NPPG. The Mineral Planning Authority does not consider it prudent at this time (prior to the outcome of the Norfolk Minerals and Waste Local Plan Review) to base allocations purely on a rolling average of ten years sales, as having regard to paragraph 11 of the revised NPPF, flexibility is required in allocations.

6.3.3 The current Minerals and Waste Local Plan Review is the most appropriate method of determining any revised target for Core Strategy Policy CS1, having regard to the data in this LAA. The aim of any revised target will be to achieve an adequate and steady supply of aggregate over the revised plan period to 2036, recognising that Norfolk has not met the apportionment figure for many years. Minerals sales figures for Norfolk will be used to determine the most appropriate production figure for site allocations to be based on, considering the need to balance flexibility in supply to meet growth targets, while ensuring the timely completion and restoration of aggregate extraction sites.

6.3.4 The Initial Consultation document proposed that the 20-year average would provide the best approach as this time period includes data from at least one complete economic cycle, alternatives such as the 10-year rolling average were also included in the consultation document. The data available at the Initial Consultation stage was the 20-year average for the period 1997-2016; this was 1,980,000 tonnes per annum for sand and gravel and 126,500 tpa for Carstone.

6.3.5 The Preferred Options consultation on the Minerals and Waste Local Plan Review took place during September/October 2019. It also proposed forecasting the need for minerals using the 20-year average production. The data available at the Preferred Options stage was the 20-year average for the period 1999-2018; this was 1,868,000 tonnes per annum for sand and gravel and 121,400 tpa for carstone. The Pre-Submission Publication stage is planned to take place in 2020.

6.3.6 The adopted Minerals Plan is up to date in relation to the supply of aggregate, and the County Council considers that sufficient sand and gravel allocations within the plan to meet the current adopted CS1 target, to 2026, are deliverable.

6.3.7 Norfolk County Council undertook a Single Issue Silica Sand Review of the Minerals Site Specific Allocations Plan. This was examined in March 2017 and found sound and legally compliant; and was adopted by the Council in December 2017. Silica sand is a nationally important industrial mineral and is not used for aggregate uses in Norfolk.

6.3.8 The figure for aggregate need, in the current plan, was apportioned to MPAs by the East of England Regional Aggregates Working Party (EoEAWP) based on national guidelines. The EoEAWP has a valuable role in co-ordinating mineral provision. The EoEAWP's previous position was that all MPAs in the East of England should work with the 2009 EoEAWP apportionment figure in planning for future provision. However, the EoEAWP's position regarding apportionment was reviewed at its November 2016 meeting. It was decided that the lack of an updated national guidelines rendered the current apportionment increasingly obsolete. It was agreed that MPAs within the EoEAWP would plan for future need based on Paragraph 145 (now paragraph 207) of the revised NPPF. Paragraph 207 states that, these figures should still be taken into account, as a guideline, as part of the process for determining future demand for, and supply of, aggregates.

6.3.9 The 2005-2020 apportionment figures were based on a sound and thorough assessment of national need, and detailed debate at the time. The methodology underlying the assessment of national need (2005-2020) was based on an assumption

of continued growth especially in housing construction throughout the period, this has been significantly affected by the recession. Norfolk County Council is considering future mineral need as part of the Plan review and has analysed past production across a range of time periods to determine the most appropriate level of mineral extraction to plan for.

6.3.10 Secondary & Recycled Provision Allowance to 2026 – the locally derived data available on secondary and recycled aggregate is variable and not considered completely comprehensive because many operations, such as on-site recovery, are not recorded. The data contains inert and construction/demolition waste; some parts of this waste stream are unsuitable for use as recycled aggregate, however it is not possible to disaggregate these wastes from the totals. This makes it difficult for Norfolk County Council to reduce the level of land won aggregate provision on this basis. The government carries out studies on secondary and recycled aggregate arisings in England, the most recent being in 2005 by DCLG. The work carried out to produce the aggregate apportionment figures for the period 2005-2020 took account of the capacity of facilities to provide recycled and secondary aggregates i.e. the assumptions are built into the apportionment figure. This enabled the apportionment figures to be set at a lower level than they otherwise would have been. Despite this, aggregate production in Norfolk has not met this apportionment figure for many years. Planned aggregate provision will be reviewed as part of the current Minerals and Waste Local Plan Review, but it is not proposed to make any adjustments to the forecast mineral requirement figures based on secondary and recycled aggregate provision due to the quality of the data.

6.3.11 Marine Sources Requirement to 2026 – the total of less than 500 tonnes of marine sourced aggregate represents such a small percentage of the total aggregates used in Norfolk it is not proposed to make any adjustments to the mineral requirement figures due to marine sourced aggregates.

7. Silica Sand

7.1 Silica Sand is a nationally important industrial mineral, deposits of which are nationally scarce. Silica sand is extracted in West Norfolk and processed at a plant at Leziate, prior to being transported to industrial facilities, principally by train from the dedicated railhead at the processing plant. The high-quality silica sand extracted in Norfolk is not used as an aggregate, it is an essential raw material for many industrial processes, including the manufacture of glass. Norfolk is one of the most important sources of silica sand in Britain, accounting for 18 per cent of total output and a much larger proportion of glass sand production.

7.2 A Single Issue Silica Sand Review of the Minerals Local Plan was undertaken between 2015 and 2017 to address a predicted shortfall in sites for silica sand extraction. The Silica Sand Review was adopted in December 2017, following an Examination in Public carried out by an independent Planning Inspector.

7.3 A review of the entire Minerals and Waste Local Plan commenced in 2017, with a 'call for sites'. This resulted in insufficient potential sites for silica sand extraction being submitted. Therefore, it was proposed to continue to include the 'Areas of Search' for potential future silica sand exploration, that were adopted in the Silica Sand Review. An Initial public consultation stage took place during June-August 2018, and a Preferred Options public consultation took place during September-October 2019. The next stage will be the Pre-submission Publication which will take place in 2021.

7.4 The 10-year average production for the Leziate site for 2010-2019 was 780,706 tonnes. This is an increase of 8% on the previous 10-year average (2009-2019) which was 721,117 tonnes. The ten-year average is shown on the graph below and the data has been provided by Sibelco UK Ltd. However, it is unlikely that the 10-year average figure for 2014 is correct because it is not consistent with the 10-year average figures for 2013 and 2015.

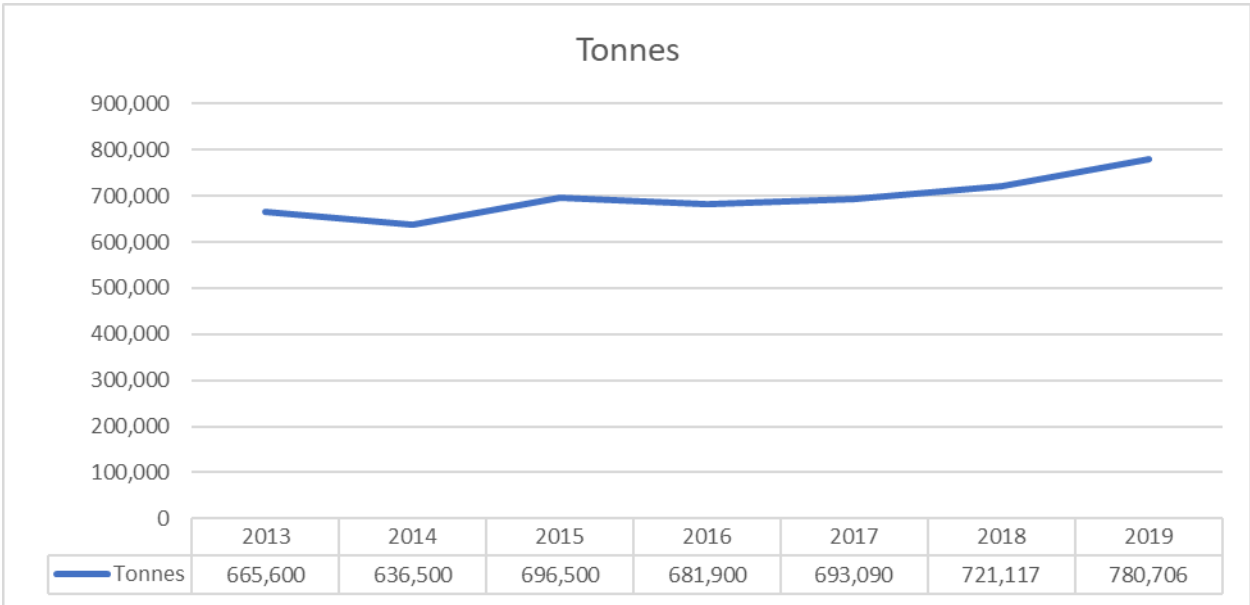


Table 17: 10 year rolling average of silica sand production

7.5 The three-year average of silica sand extraction in Norfolk from 2017-2019 was 854,092 tonnes. This is a 6% increase on the previous three-year average (from 2016-2018) which was 803,587 tonnes.

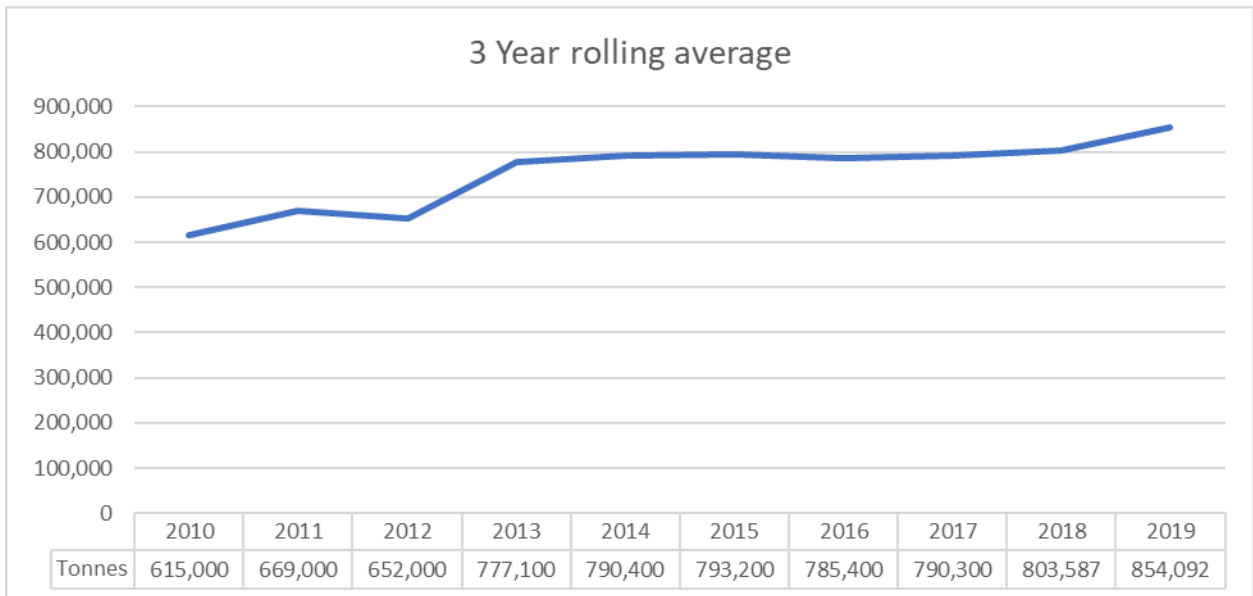


Table 18: 3 year rolling average of silica sand production

7.6 The silica sand reserve at 31/12/2019 was estimated at 3.181 million tonnes. This represents a landbank of 4.1 years based on the 10-year average figure, this is less than the “at least” 10 years for individual silica sand sites required in the NPPF. One planning application was submitted for silica sand extraction in 2018 on allocated site MIN 40 at East Winch; this site contains an estimated resource of three million tonnes. At the end of 2019 the application had not yet been determined. If the application for site MIN 40 was granted, the permitted reserve would increase to 6.181 million tonnes which would represent a landbank of 7.9 years. This would still represent a shortfall based on the amount planned for in Core Strategy Policy CS1 which was based on a forecast production volume of 750,000 tonnes per annum.



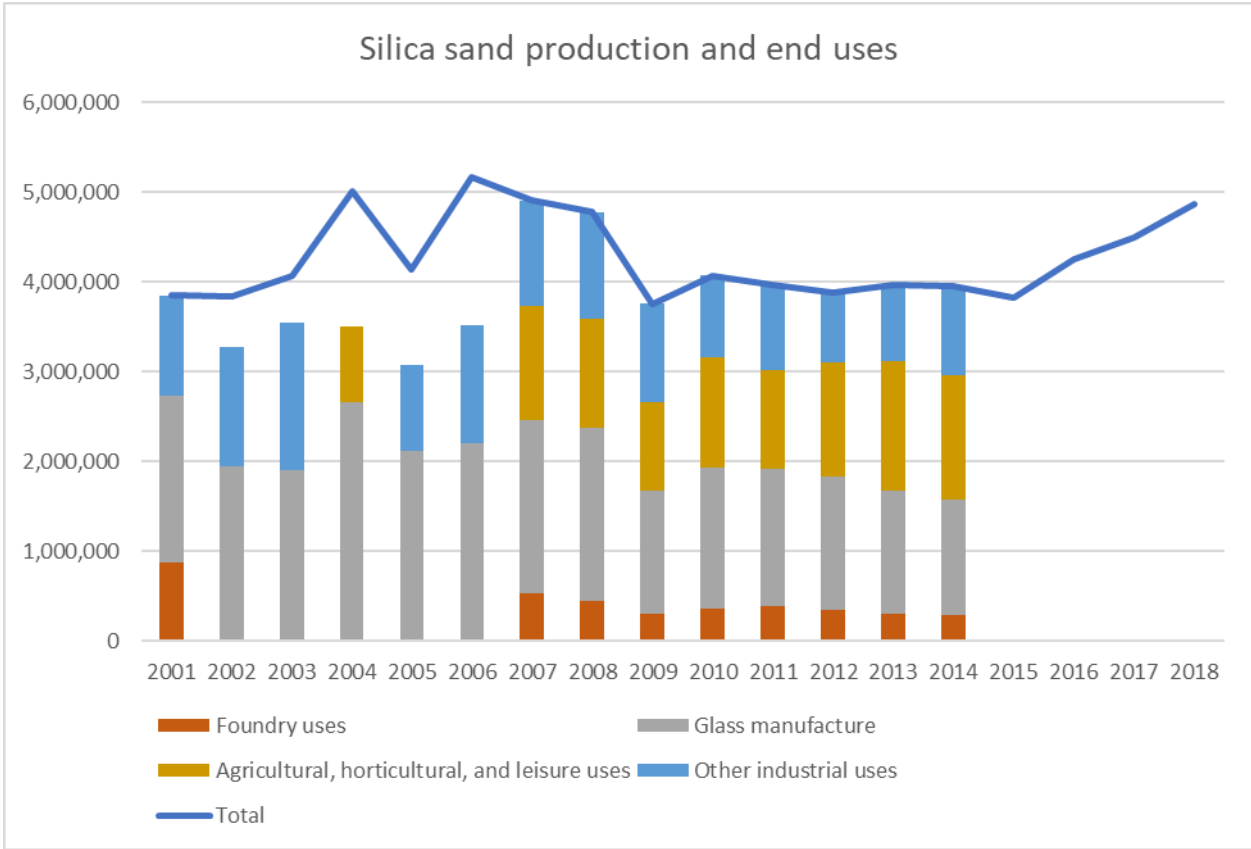
7.7 The table below provides a national picture of silica sand production by end use over the most recent 18 years for which data is available. Where it is listed that figures are not available this is because the information is considered confidential by the BGS,

due to a small number of extraction companies involved in that market. The total includes all end use sectors.

Table 19. Great Britain production of silica sand by end use

Year	Foundry uses	Glass manufacture	Other industrial uses	Agricultural, horticultural and leisure uses	Total
2018	...	...	...	...	4,863,240
2017	...	...	...	...	4,490,367
2016	...	...	...	...	4,251,219
2015	...	...	...	...	3,822,107
2014	>284,000	<1,288,000	982,000	1,394,000	3,948,000
2013	>302,000	<1,374,000	837,000	1,448,000	3,961,000
2012	340,000	1,489,000	782,000	1,277,000	3,888,000
2011	382,000	1,528,000	956,000	1,104,000	3,969,000
2010	353,000	1,582,000	913,000	1,222,000	4,070,000
2009	>297,000	<1,374,000	1,096,000	988,000	3,755,000
2008	443,000	1,932,000	1,186,000	1,216,000	4,777,000
2007	527,000	1,930,000	1,178,000	1,274,000	4,909,000
2006	...	2,206,000	1,306,000	...	5,174,000
2005	...	2,120,000	954,000	...	4,146,000
2004	...	2,663,000	...	838,000	5,011,000
2003	...	1,896,000	1,645,000	...	4,073,000
2002	...	1,940,000	1,331,000	...	3,833,000
2001	880,000	1,853,000	1,115,000	...	3,848,000

... Figures not available Source: BGS UK Minerals Yearbooks



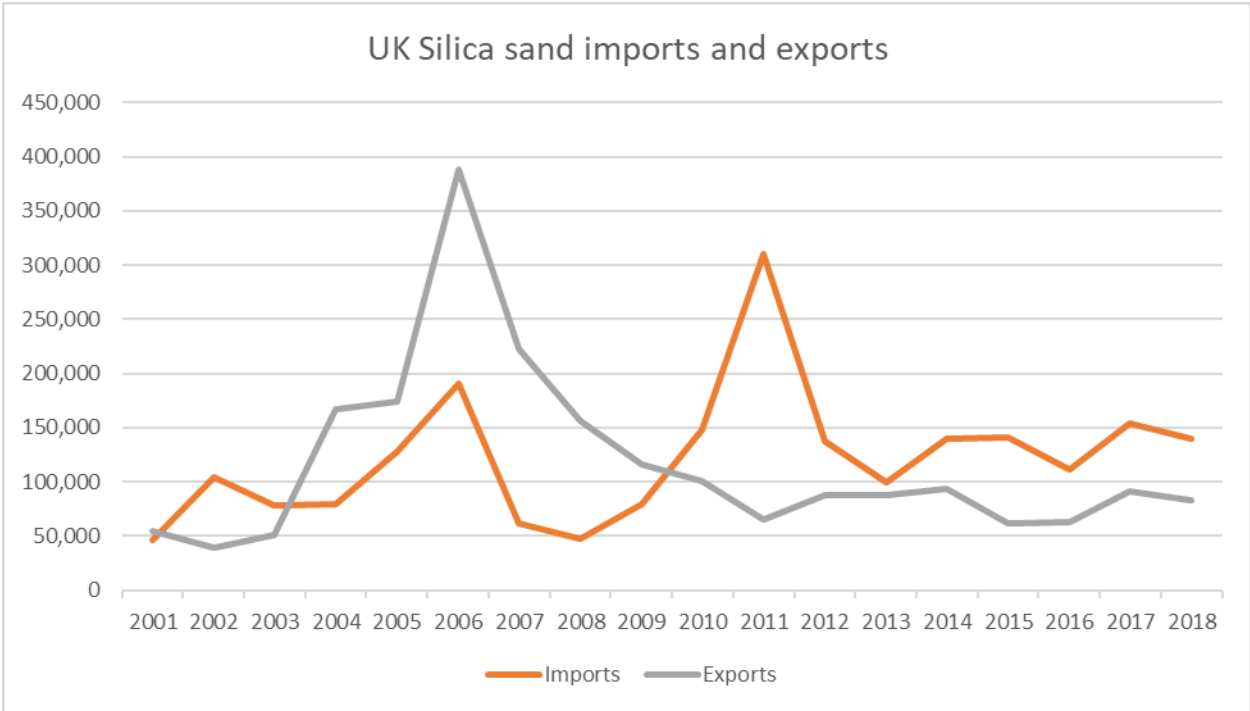
7.8 As stated above, the three-year average of silica sand extraction in Norfolk in 2016-2018 was 803,587 tonnes. This is approximately 18% of all silica sand production in Great Britain in the same period.

7.9 Imports and Exports

The British Geological Survey records the imports and exports of mineral from the United Kingdom. This data is presented in the Minerals Yearbook. The table and graph below show the imports and exports since 2001.

Year	Imports	Exports
2018	139,980	83,315
2017	154,051	91,001
2016	111,060	63,227
2015	140,865	61,234
2014	139,874	93,849
2013	100,057	87,289
2012	137,761	88,376
2011	310,715	64,924
2010	148,619	100,773
2009	79,629	115,746
2008	48,112	156,451
2007	61,454	222,581
2006	190,813	388,440
2005	127,992	174,236
2004	79,829	166,899
2003	78,944	51,095
2002	104,232	39,816
2001	46,500	54,419

Table 20: Imports and exports of UK silica sand (source: BGS Minerals Yearbook)



8. Other minerals worked in Norfolk

7.1 Several other minerals besides sand and gravel, and carstone, are worked on a minor scale in Norfolk. Demand for these minerals is such that they are not included in the planned provision of the Minerals and Waste Core Strategy, instead being dealt with on a case by case basis through the planning application process.

The table below gives details of the other mineral workings in Norfolk.

Clay Workings		
Parish	Operator	Address
Middleton	Middleton Aggregates	Setch Road

Chalk Extraction		
Parish	Operator	Address
Caistor St Edmund	Needham Chalks Ltd	Norwich Road
Hillington	West Norfolk Lime Ltd	Grimston Road
Castle Acre	Needham Chalks Ltd	Dunham Road

Table 21: Other minerals worked in Norfolk in 2019

9. Glossary

Aggregate Minerals: hard, granular materials which are suitable for use either on their own or with the addition of cement, lime or a bituminous binder in construction.

Apportionment (Minerals): The splitting of national supply guidelines for minerals demand between Minerals Planning Authorities or sub regions.

Area of Outstanding Natural Beauty: designated under the National Parks and Access to the Countryside Act 1949 for the purposes of preserving and enhancing their natural beauty.

British Geological Survey (BGS): A partly publicly funded body whose purpose is the advancement of geoscientific knowledge of the UK landmass and its continental shelf through survey, research and monitoring.

Core Strategy (for Minerals and Waste): This planning policy document contains the vision, objectives and strategic planning policies for minerals and waste development in Norfolk until 2026. The Minerals and Waste Core Strategy also includes Development Management policies which are used in the determination of planning applications to ensure that minerals extraction and associated development and waste management facilities can happen in a sustainable way.

Development Management: The process through which the Council determines whether a proposal for development should be granted planning permission, taking into account the development plan and any other material considerations.

Development Plan: This includes adopted Local Plans and neighbourhood plans and is defined in section 38 of the Planning and Compulsory Purchase Act 2004 (as amended) that set out the planning policies and proposals for the development and use of land. Decisions on planning applications must conform to the Development Plan, unless material considerations indicate otherwise.

East of England Aggregate Working Party: Established in the 1970's to identify and consider problems in the supply of aggregates. They provide technical advice in relation to the supply of, and demand for, aggregates in the East of England (including sand, gravel and crushed rock) to the Secretary of State, local government and mineral planning authorities.

Examination: Local Plans are subject to an independent examination by an independent planning inspector. The recommendations in the Inspector's report will inform the final adopted version of the Local Plan.

Industrial Minerals: Minerals which are worked for their commercial value, which are not fuel (fuel minerals or mineral fuels) and are not sources of metals (metallic minerals). These minerals are used in industries based on their physical and/or chemical properties. In Norfolk, silica sand is the only industrial mineral currently extracted.

Landbank: A stock of mineral reserves with planning permission for their extraction.

Local Plan: The plan for the future development of the local area, drawn up by the local planning authority in consultation with the community. In law this is described as the development plan documents adopted under the Planning and Compulsory Purchase Act 2004 (as amended). Current core strategies or other planning policies, which under the regulations would be considered to be development plan documents, form part of the Local Plan. The term includes old policies which have been saved under the 2004 Act.

Managed Aggregate Supply System (MASS): guidance which firstly set out future national needs and targets for aggregate minerals for a period of years and then subdivided this into regional needs and targets. Regional Aggregate Working Parties then apportioned the regional targets to individual Mineral Planning Authorities for incorporation into Minerals Local Plans. Secondly MASS guidance also set out how items such as landbanks should be calculated and used in the determination of planning applications for minerals. The policy and guidance was cancelled by the publication of the NPPF in 2012.

Mineral Planning Authority: An organisation with statutory planning powers relating to minerals development, in most areas the County or Unitary Council.

Mineral Resources: Natural concentrations of minerals in or on the Earth's crust that are or may become of economic interest because they are present in such a form, quality and quantity that there is potential for eventual economic extraction.

National Planning Policy Framework: This document sets out the Government's planning policies for England and the most recent version was published in February 2019. The NPPF must be taken into account in the preparation of Local and neighbourhood Plans and is a material consideration in planning decisions. It states that in order to be considered sound a Local Plan should be consistent with national planning policy.

National Planning Practice Guidance: A web-based resource published by the Ministry for Housing, Communities and Local Government (MHCLG) and updated as needed. It is available at: www.gov.uk/government/collections/planning-practice-guidance

Permitted reserves: Saleable minerals in the ground with planning permission for extraction. Usually expressed in million tonnes.

Restoration: Operations designed to return an area to an acceptable environmental state, whether for the resumption of the former land use or for a new use following mineral working. Involves the reinstatement of land by contouring, the spreading of soils or soil making materials etc.

Specific Sites (for mineral extraction): where viable resources are known to exist, landowners are supportive of minerals development and the proposal is likely to be acceptable in planning terms. Such sites may also include essential operations associated with mineral extraction. This is the preferred way to plan for the steady and adequate supply of minerals as it provides the necessary certainty on when and where development may take place.

Site of Specific Scientific Interest (SSSI): Sites designated by Natural England under the Wildlife and Countryside Act 1981 on account of their flora, fauna, geological or physiographical features.

Special Area of Conservation (SAC): An SSSI of international importance designated under the EC Directive on the Conservation of Natural Habitats and Wild Fauna and Flora.

Special Protection Area (SPA): An SSSI of international importance for the breeding, feeding, wintering or the migration of rare and vulnerable species of birds found in European Union countries. They are European designated sites, classified under the EC Directive on the Conservation of Wild Birds.