



# Waste Treatment Capacity in Ireland

Final Report (Rev 4)

for



1<sup>st</sup> November 2022

SLR ref: 501.064720.00001

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# 1. BACKGROUND, SCOPE AND METHODOLOGY

SLR was commissioned by the Irish Waste Management Association (IWMA) to review the throughput and capacity of the main facilities that are transferring and treating Municipal Solid Waste (MSW) in Ireland. It is expected that this report will be shared with the relevant authorities in the context of waste management planning and policy in Ireland.

The capacity of the facilities detailed in this report is based on the regulated capacity (planning and permit/licence), their operational status and in some cases includes operational capacity constraints where facilities are not capable of accepting the full regulated capacity for a variety of reasons. Utilised and spare capacity generally refer to a percentage of total capacity in this report, but in some cases we recognise that some spare capacity is not available for MSW, so a lower spare capacity is known to be available for MSW. It was not possible to fully compare MSW utilised versus MSW capacity at all facilities as there is significant cross-over between MSW and non-MSW (e.g. C&D) capacity at many sites.

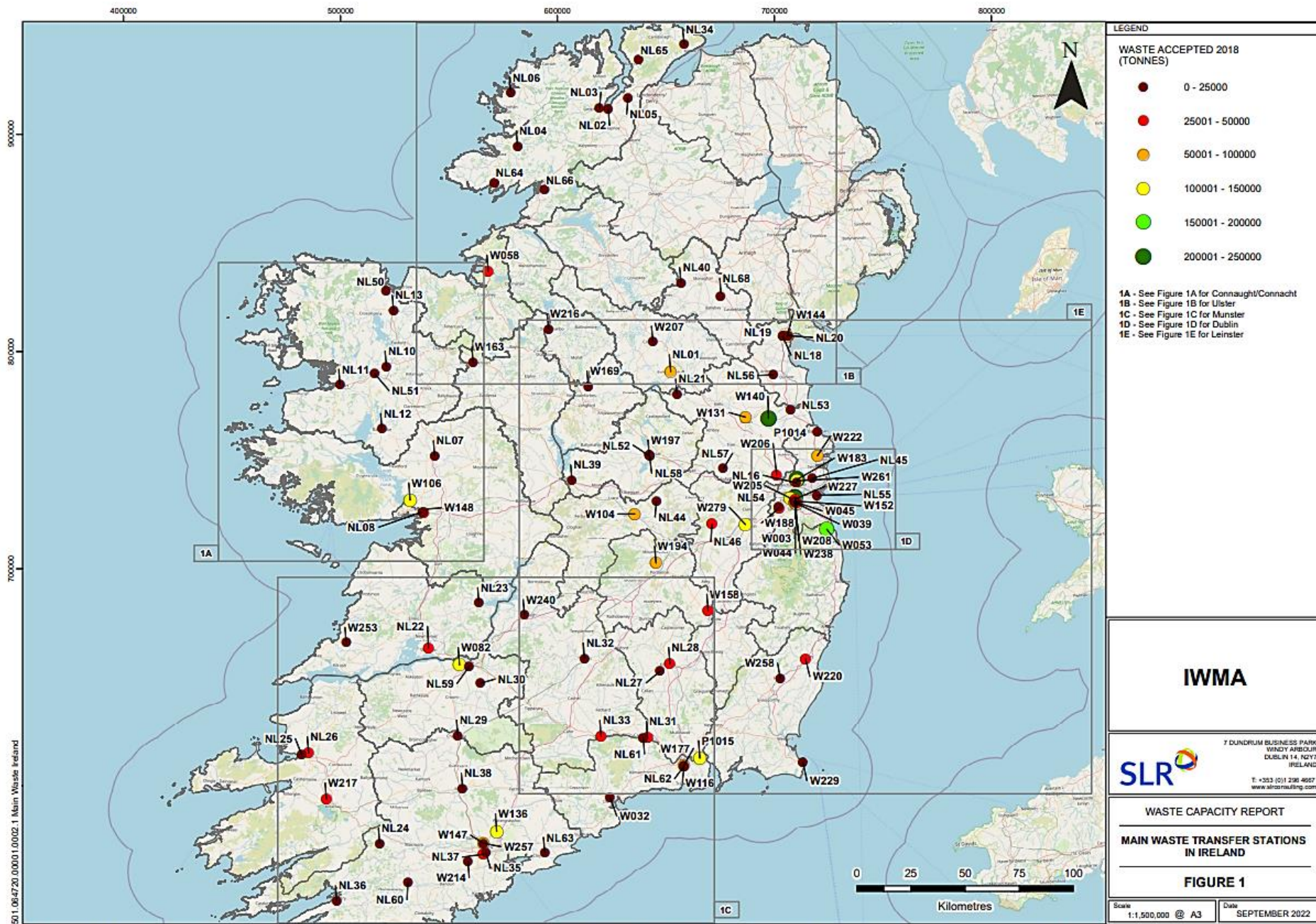
The waste throughput data was sourced from datasets published by the EPA and the National Waste Collection Permit Office (NWCPO) as well as the Annual Environmental Reports prepared by the site operators and submitted to the relevant authorities. It was decided to focus on 2018 and 2019 calendar years, as 2020 and 2021 were impacted by COVID-19.

The work involved the preparation of the following datasets:

- ❑ An inventory of licensed and permitted facilities in Ireland that transfer/process MSW and skip waste, excluding specialised facilities such as metal recycling, WEEE, ATFs, paper, plastics, etc.
- ❑ A Separate Review of Materials Recovery Facilities (MRFs) where mixed dry recyclables are processed.
- ❑ A Separate Review of biological treatment facilities where organic waste and/or MSW fines are processed.
- ❑ A Separate Review of final treatment facilities such as landfills and Waste to Energy (WtE) plants.
- ❑ The provision of Maps showing the locations of the facilities included in the analysis.

The main dataset is presented by province, with a separate table for Dublin. This should help with an understanding of regional capacity issues.



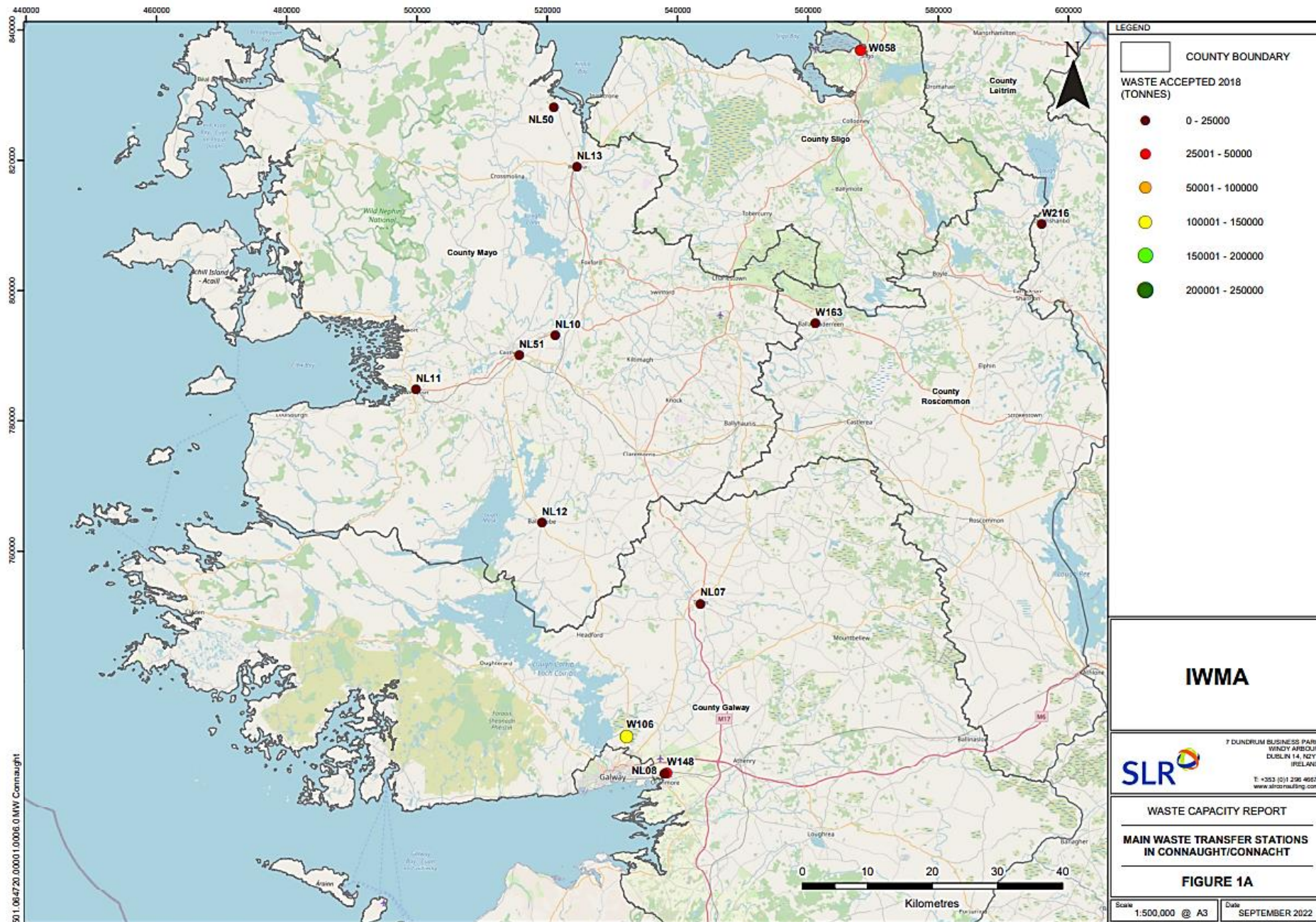


## 2. TRANSFER AND PRE-TREATMENT FACILITIES

### 2.1 Location of Main Waste Transfer Stations in Ireland







## 2. TRANSFER AND PRE-TREATMENT FACILITIES

### 2.2 Connacht

#### 2.2.1 Location of Main Waste Transfer Stations in Connacht



## 2. TRANSFER AND PRE-TREATMENT FACILITIES

### 2.2.2 Connacht Data



SLR Code	Authority Ref:	Name	Location	County	MSW Capacity	Licensed or Permitted Capacity	Operational Capacity (inc. planning restrictions)	Waste In Total 2018	Waste in Total 2019	Spare Capacity 2018 Licence / Permit	Spare Capacity 2019 Licence / Permit	Actual Spare Capacity 2018	Actual Spare Capacity 2019
				Column Ref:	A	B	C	D	E	F (B - D)	G (B - E)	H (C - D)	I (C - E)
W106	W0106-02	Barna Waste	Carrowbrowne	Galway	96,000	166,000	166,000	111,072	133,611	54,928	32,389	54,928	32,389
W148	W0148-01	The City Bin Co Ltd	Carrowmoneash	Galway	50,000	130,000	50,000	38,225	36,299	91,775	93,701	11,775	13,701
NL08	WFP-G-14-0001-01	Walsh Waste	Oranmore	Galway	30,000	50,000	50,000	22,713	26,984	27,287	23,016	27,287	23,016
W058	W0058-01	Greenstar / Panda	Deepwater Quay	Sligo	91,000	100,000	35,000	26,815	25,085	73,185	74,915	8,185	9,915
W163	W0163-01	Bergin (Barna)	Ballaghaderreen	Roscommon	18,600	19,700	19,700	19,645	19,253	55	447	55	447
W216	W0216-01	Barna Waste	Ardcolum	Leitrim	21,000	25,000	25,000	20,072	19,017	4,928	5,983	4,928	5,983
NL11	WFP-MO-19-0044-01	Bourke Waste Removals	Westport	Mayo	20,000	25,000	25,000	17,036	18,626	7,964	6,374	7,964	6,374
NL10	WFP-MO-13-0030-02	McGrath Industrial Waste	Castlebar (Moneenbradagh)	Mayo	24,000	100,000	24,000	16,068	17,645	83,932	82,355	7,932	6,355
NL07	WFP-G-20-0010-01	WERS Waste	Tuam	Galway	4,650	5,000	5,000	9,791	6,759	-4,791	-1,759	-4,791	-1,759
NL13	WFP-MO-15-0037-01	G&N Loftus Recycling	Ballina	Mayo	8,000	8,000	8,000	6,750	6,572	1,250	1,428	1,250	1,428
NL12	WFP-MO-12-0024-02	Ballinrobe Waste	Ballinrobe	Mayo	10,000	10,000	10,000	6,013	5,977	3,987	4,023	3,987	4,023
NL50	WFP-MO-17-0040-01	McGrath Industrial Waste	Killala	Mayo	20,000	20,000	20,000	1,231	1,414	18,769	18,586	18,769	18,586
NL51	WFP-MO-11-0019-03	Feoil Freight (Sweeney Recycling)	Castlebar	Mayo	12,100	12,100	12,100	1,199	1,098	10,901	11,002	10,901	11,002
					<b>405,350</b>	<b>670,800</b>	<b>449,800</b>	<b>296,630</b>	<b>318,341</b>	<b>374,170</b>	<b>352,459</b>	<b>153,170</b>	<b>131,459</b>
									<b>Spare =</b>	56%	53%	<b>34%</b>	<b>29%</b>
									<b>Utilised =</b>	44%	47%	<b>66%</b>	<b>71%</b>

**Note:** All Figures are in tonnes per annum

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## 2. TRANSFER AND PRE-TREATMENT FACILITIES

### 2.2.3 Connacht Data Discussion

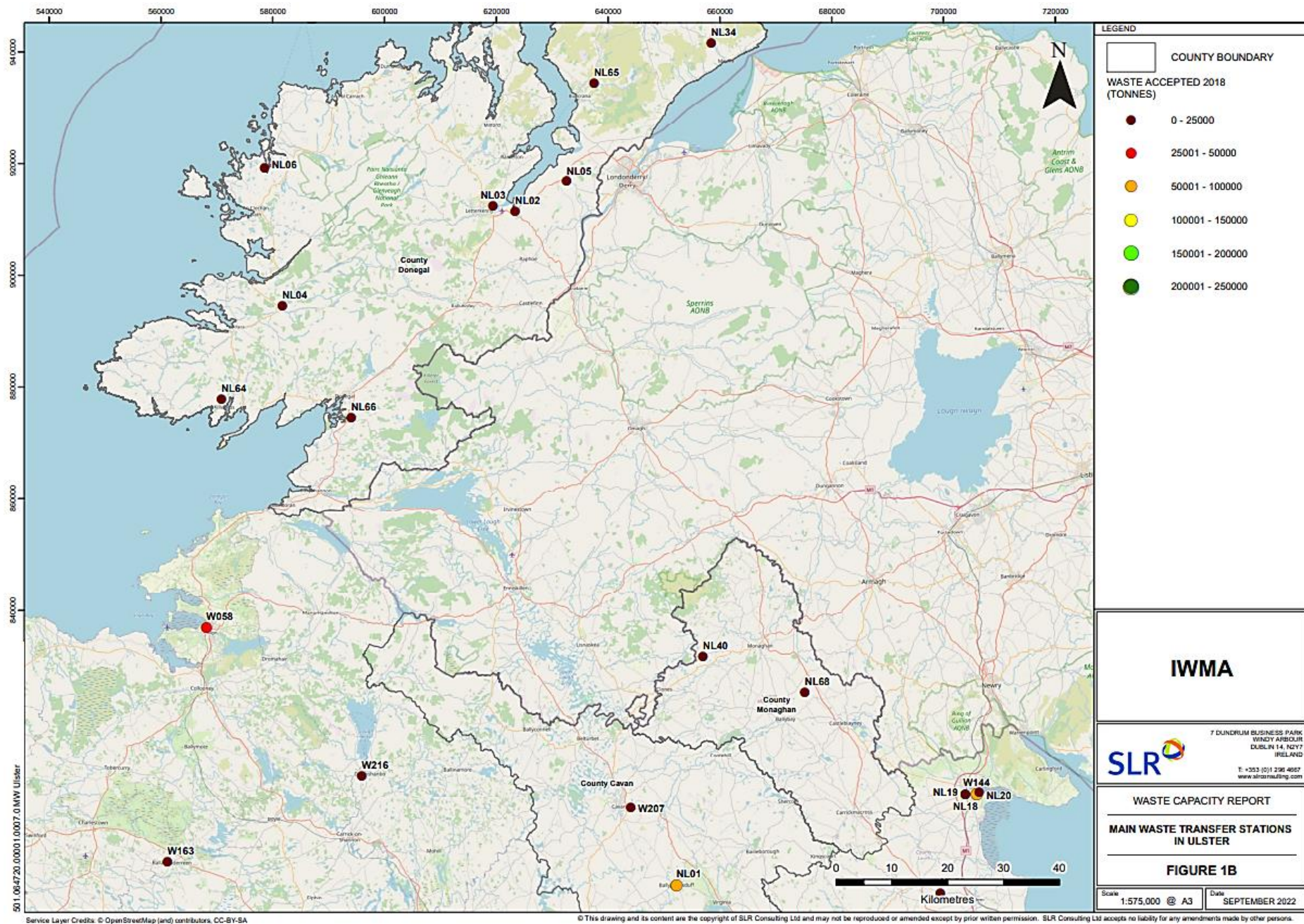
The Data presented in the Table above suggests that utilised operational capacity in Connacht increased from 66% in 2018 to **71%** in 2019. The operational capacity is significantly lower than the licensed/permitted capacity, based on the following observations:

- ❑ The City Bin Co facility at Carrowmoneash near Oranmore on the eastern outskirts of Galway City is limited to 50,000 t/a MSW and we note that in 2018 and 2019, the facility almost exclusively handled MSW, with minimal C&D waste, so the additional 80,000 t/a available for handling C&D waste is not available for MSW and is therefore not included in our analysis.
- ❑ We are informed by Beuparc (Panda) that its facility at Deepwater Quay in Sligo is only able to handle about 35Kt/a with its current operational set-up. More infrastructure is needed to achieve the full licensed capacity.
- ❑ McGrath Industrial Waste's facility in Castlebar has a permit for 100,000 t/a, but a decision by An Bord Pleanála limits the planning permission to 24,000 t/a due to the absence of EIA.
- ❑ Note that other facilities may have reduced operational capacity, but it was beyond the scope of this report to discuss these details with every facility operator in the country. Hence, the 71% utilised operational capacity should be seen as a minimum level of utilisation with a maximum spare capacity of 29% in 2019. The spare capacity is spread across the province with higher spare capacity apparent close to Galway City, which is by far the largest city in Connacht.



Beuparc's Sligo Facility

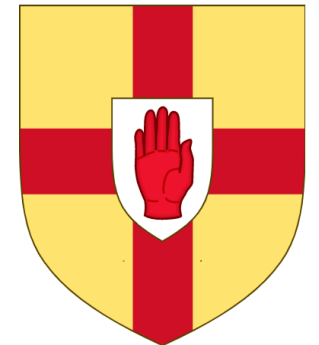




## 2. TRANSFER AND PRE-TREATMENT FACILITIES

### 2.3 Ulster

#### 2.3.1 Location of Main Waste Transfer Stations in Ulster (Rol only)



## 2. TRANSFER AND PRE-TREATMENT FACILITIES

### 2.3.2 Ulster Data (Republic of Ireland only)



SLR Code	Authority Ref:	Name	Location	County	MSW Capacity	Licensed or Permitted Capacity	Operational Capacity (inc. planning restrictions)	Waste In Total 2018	Waste In Total 2019	Spare Capacity 2018 Licence / Permit	Spare Capacity 2019 Licence / Permit	Actual Spare Capacity 2018	Actual Spare Capacity 2019
				Column Ref:	A	B	C	D	E	F (B - D)	G (B - E)	H (C - D)	I (C - E)
NL01	WFP-CN-20-0001-01	Wilton	Ballyjamesduff	Cavan	50,000	50,000	50,000	56,895	49,319	-6,895	681	-6,895	681
NL02	WFP-DL-20-006-04	Sidney McDaid / Letterkenny Skip Hire	Letterkenny	Donegal	25,000	23,515	23,515	18,205	23,406	5,310	109	5,310	109
NL05	WFP-DL-19-0114-03	Patrick Logan & Sons	Newtowncunningham	Donegal	19,000	19,000	19,000	15,526	20,481	3,474	-1,481	3,474	-1,481
W207	W0207-01	Cavan Waste (Oxigen)	Killygarry Ind Park	Cavan	17,990	24,990	24,990	23,939	23,505	1,051	1,485	1,051	1,485
NL03	WFP-DL-11-0019-01	D&M Environmental Services	Letterkenny	Donegal	7,500	7,500	7,500	10,605	11,227	-3,105	-3,727	-3,105	-3,727
NL04	WFP-DL-16-009-04	Shaun Molloy & Sons (Donegal Waste)	Glenties	Donegal	7,500	7,500	7,500	8,628	10,462	-1,128	-2,962	-1,128	-2,962
NL68	WFP-MN-20-0004-01	Exomex (McElvaney's / Panda)	Scotch Corner	Monaghan	24,500	24,500	24,500	9,080	8,894	15,420	15,606	15,420	15,606
NL06	WFP-DL-09-029-01	Sharkey Waste Recycling	Letterkenny	Donegal	9,315	11,000	11,000	6,630	6,987	4,370	4,013	4,370	4,013
NL40	WFP-MN-11-0009-08	Blue Dolphin Environmental	Smithborough	Monaghan	25,000	25,000	25,000	4,419	5,662	20,581	19,338	20,581	19,338
NL64	WFP-DL-15-027-01	Pauric Meehan	Killybegs	Donegal	7,500	7,500	7,500	826	1,012	6,674	6,488	6,674	6,488
NL65	WFP-DL-14-015-01	Hubert McLaughlin & Sons Ltd	Buncrana	Donegal	7,500	7,500	7,500	707	967	6,793	6,533	6,793	6,533
NL66	WFP-DL-15-002-01	Laghey Waste Ltd.	Laghey	Donegal	7,500	7,500	7,500	631	551	6,869	6,949	6,869	6,949
NL34	WFP-DL-14-0115-01	Davey Transport Ltd	Moville	Donegal	7,500	7,500	7,500	3,201	343	4,299	7,157	4,299	7,157
				<b>Total =</b>	<b>215,805</b>	<b>223,005</b>	<b>223,005</b>	<b>159,292</b>	<b>155,663</b>	<b>63,713</b>	<b>60,189</b>	<b>63,713</b>	<b>60,189</b>
									<b>Spare =</b>	<b>29%</b>	<b>27%</b>	<b>29%</b>	<b>27%</b>
									<b>Utilised =</b>	<b>71%</b>	<b>73%</b>	<b>71%</b>	<b>73%</b>

**Note:** All Figures are in tonnes per annum



## 2. TRANSFER AND PRE-TREATMENT FACILITIES

### 2.3.3 Ulster Data Discussion

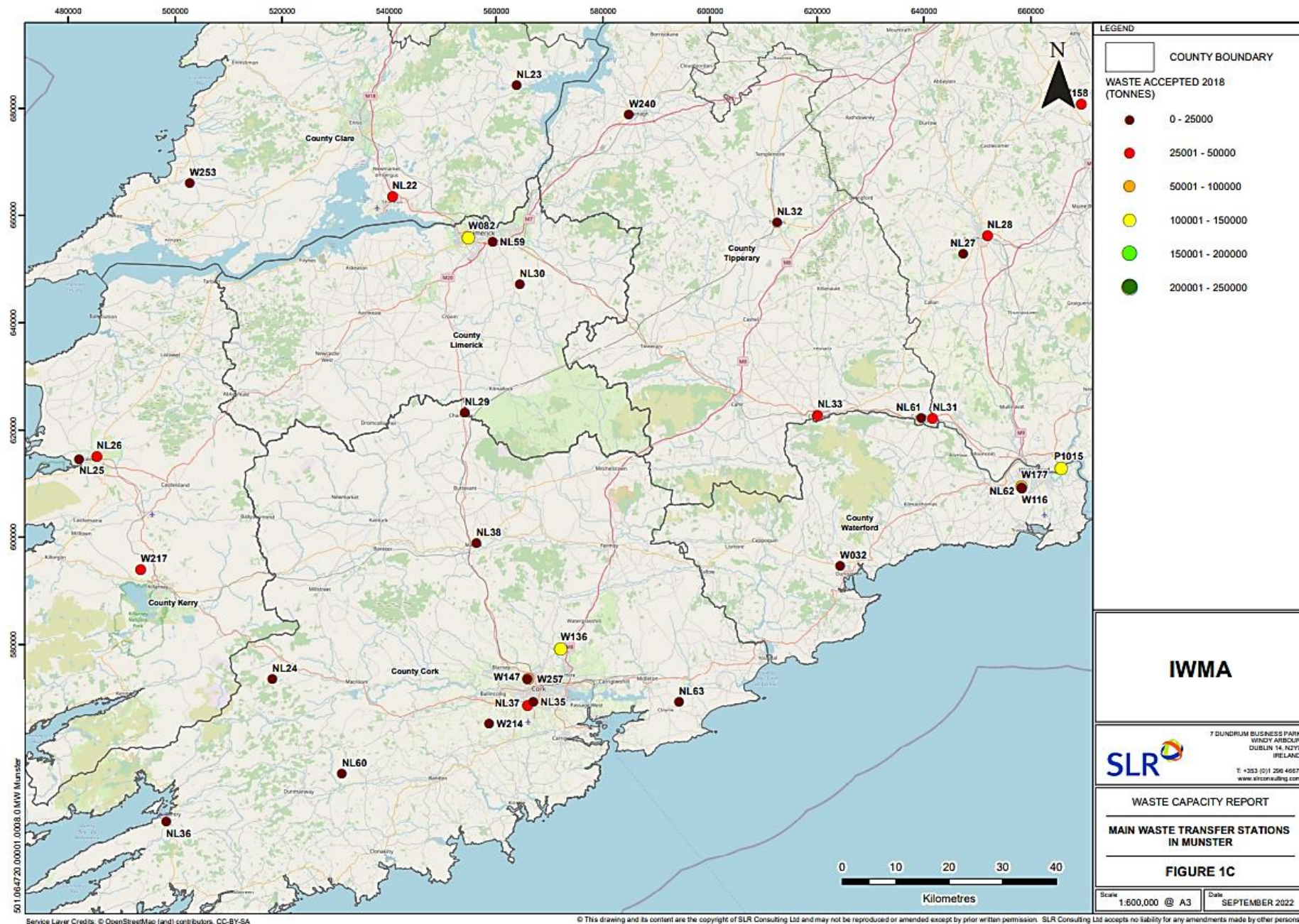
The Data presented in the Table above suggests that utilised operational capacity in Ulster increased from 71% in 2018 to **73%** in 2019. The operational capacity appears to be consistent with the licensed/permitted capacity, but feedback from operators has been quite limited. We observe the following from the data:

- ❑ The Ulster counties in the Republic of Ireland are spread over quite a large geographical distance, so while there appears to be capacity available at Smithborough and Scotch Corner in Monaghan, this is of little relevance to waste generated in County Donegal, due to the travel distances and the limitations of the road network in this part of the country.
- ❑ If the two Monaghan facilities are removed from the dataset, the utilised capacity increases to 84% in 2018 and 85% in 2019, so there are clear pinch points in parts of Ulster.
- ❑ Note that some facilities may have reduced operational capacity, but it was beyond the scope of this report to discuss these details with every facility operator in the country. Hence, the 73% utilised operational capacity should be seen as a minimum level of utilisation with a maximum spare capacity of 27% in 2019. Noting also that the spare capacity may not be available where it might be needed as contingency.



McElvaney's Scotch Corner Facility in Monaghan





## 2. TRANSFER AND PRE-TREATMENT FACILITIES

### 2.4 Munster

#### 2.4.1 Location of Main Waste Transfer Stations in Munster



## 2. TRANSFER AND PRE-TREATMENT FACILITIES

### 2.4.2 Munster Data (Page 1 of 2)



SLR Code	Authority Ref:	Name	Location	County	MSW Capacity	Licensed or Permitted Capacity	Operational Capacity (inc. planning restrictions)	Waste In Total 2018	Waste In Total 2019	Spare Capacity 2018 Licence / Permit	Spare Capacity 2019 Licence / Permit	Actual Spare Capacity 2018	Actual Spare Capacity 2019
				Column Ref:	A	B	C	D	E	F (B - D)	G (B - E)	H (C - D)	I (C - E)
W082	W082-03	Panda/Greenstar	Dock Road	Limerick	130,000	130,000	130,000	116,697	126,690	13,303	3,310	13,303	3,310
W136	W136-03	Greenstar / Panda	Sarsfieldcourt	Cork	164,990	200,000	130,000	109,918	123,500	90,082	76,500	20,082	6,500
W257	W257-01	Country Clean	ChurchfieldIndEst	Cork	87,000	100,000	100,000	97,882	88,059	2,118	11,941	2,118	11,941
W177	W177-03	Greenstar / Panda	Carrignard	Waterford City	75,000	80,000	58,000	53,488	52,978	26,512	27,022	4,512	5,022
NL26	WFP-KY-10-001-05	Dillon Recycling	The Kerries, Tralee	Kerry	50,000	50,000	50,000	49,405	53,934	595	-3,934	595	-3,934
NL31	WFP-TS-12-0002-05	Quality Recycling (Wiser)	Carrickon Suir	Tipperary	48,000	48,000	48,000	47,813	46,852	187	1,147	187	1,147
W217	W0217-02	Killarney WD	Aughacurreen	Kerry	51,500	59,000	59,000	44,599	53,059	14,401	5,941	14,401	5,941
NL33	WFP-T-11-0001-04	Clonmel Waste	Clonmel	Tipperary	49,475	49,983	49,983	35,364	39,736	14,619	10,247	14,619	10,247
NL22	WFP-CE-08-0003-03	Clean Ireland	Shannon	Clare	45,000	49,500	49,500	34,861	44,389	14,639	5,111	14,639	5,111
NL37	WFP-CC-31-2020	Cork Recycling Company	Togher	Cork	26,000	29,000	29,000	25,478	31,347	3,522	-2,347	3,522	-2,347
W240	W0240-01	AES	Nenagh	Tipperary	23,259	24,750	24,750	23,904	24,732	846	18	846	18
NL35	WFP-CC-35-2020	CND Recycling	Tramore Road	Cork	25,000	25,000	25,000	22,267	33,430	2,733	-8,430	2,733	-8,430
W147	W0147-01	Ashgrove Recycling	ChurchfieldIndEst	Cork	25,000	50,000	37,000	20,941	20,709	29,059	29,291	16,059	16,291
NL24	WFP-CK-20-0207-01	Midleton Skip Hire	Midleton	Cork	21,000	21,000	21,000	19,027	20,106	1,973	894	1,973	894
NL32	WFP-T-17-0001-03	Ryan Brothers	Thurles	Tipperary	18,500	19,500	19,500	18,225	18,648	1,275	852	1,275	852
W214	W0214-01	Ted O'Donoghue	Knockpogue	Cork	15,486	23,000	23,000	16,876	15,471	6,124	7,529	6,124	7,529
NL36	WFP-CK-12-0120-02	Bantry Skip Hire	Bantry	Cork	16,000	16,000	16,000	14,343	13,424	1,657	2,576	1,657	2,576

**Note:** All Figures are in tonnes per annum

## 2. TRANSFER AND PRE-TREATMENT FACILITIES

### 2.4.2 Munster Data (Page 2 of 2)



SLR Code	Authority Ref:	Name	Location	County	MSW Capacity	Licensed or Permitted Capacity	Operational Capacity (inc. planning restrictions)	Waste In Total 2018	Waste In Total 2019	Spare Capacity 2018 Licence / Permit	Spare Capacity 2019 Licence / Permit	Actual Spare Capacity 2018	Actual Spare Capacity 2019
				Column Ref:	A	B	C	D	E	F (B - D)	G (B - E)	H (C - D)	I (C - E)
W253	W0253-01	Clean Ireland	Ballynagun West	Clare	44,500	62,000	62,000	12,093	9,629	49,907	52,371	49,907	52,371
NL30	WFP-L-2021-170-R5	Sheahan Waste Recycling	Galvone Ind Est	Limerick	22,215	24,500	24,500	11,936	5,824	12,564	18,676	12,564	18,676
W200	W0200-01	Tipperary County Council	Cashel	Tipperary	21,100	21,100	21,100	11,327	8,977	9,773	12,123	9,773	12,123
NL29	WFP/L/2021/17D/R5	Derry White Skiphire	Charleville	Limerick	13,500	13,500	13,500	10,452	12,785	3,048	715	3,048	715
NL59	WFP/L/2019/11/002/01/R2	William Fitzgerald	Rathbane North	Limerick	4,000	17,500	17,500	9,989	9,172	7,511	8,328	7,511	8,328
NL25	WFP-KY-18-0001-01	Higgins Recycling	Tralee	Kerry	9,450	15,000	15,000	9,070	8,699	5,930	6,301	5,930	6,301
NL60	WFP-CK-10-0054-03	Donal Murphy (Ballineen Skip Hire)	Ballineen	Cork	6,000	6,000	6,000	6,706	4,358	-706	1,642	-706	1,642
NL61	WFP-T-12-0001-03	Phelan Skip Hire and Waste Management Ltd.	Carrickon Suir	Tipperary	5,300	11,000	11,000	5,801	11,334.56	5,199	-335	5,199	-335
NL62	WFP-WCCC-18-0006-01	Friends of the Earth (Skip & Fuels) Ltd	Six Cross Roads	Waterford	3,650	12,550	9,230	5,736	5,580.34	6,814	6,970	3,494	3,650
NL38	WFP-CK-09-0032-04	Abbeyross Manufacturing (Munster Waste Management)	Mallow	Cork	6,800	6,800	6,800	5,612	6,032	1,188	768	1,188	768
W032	W0032-03	Waterford CC Dungarvan	Ballynamuck Middle	Waterford	11,520	11,520	11,520	4,397	4,043	7,123	7,477	7,123	7,477
NL63	WFP-CK-11-0094-04	O'Brien Skip Hire Limited	Midleton	Cork	4,000	4,000	4,000	3,805	3,849	195	151	195	151
NL23	WFP-CE-08-0002-03	Clare Waste & Recycling Co. Ltd	Tuamgraney	Clare	13,000	13,000	13,000	3,745	5,005	9,255	7,995	9,255	7,995
NL67	WFP-KY-21-0006-01	Dillon Recycling	Monavalley Ind Est	Kerry	24,990	24,990	24,990	0	0	24,990	24,990	24,990	24,990
					<b>1,061,235</b>	<b>1,218,193</b>	<b>1,109,873</b>	<b>851,757</b>	<b>902,354</b>	<b>366,436</b>	<b>315,839</b>	<b>258,116</b>	<b>207,520</b>
									<b>Spare =</b>	30%	26%	<b>23%</b>	<b>19%</b>
									<b>Utilised =</b>	70%	74%	<b>77%</b>	<b>81%</b>

Note: All Figures are in tonnes per annum

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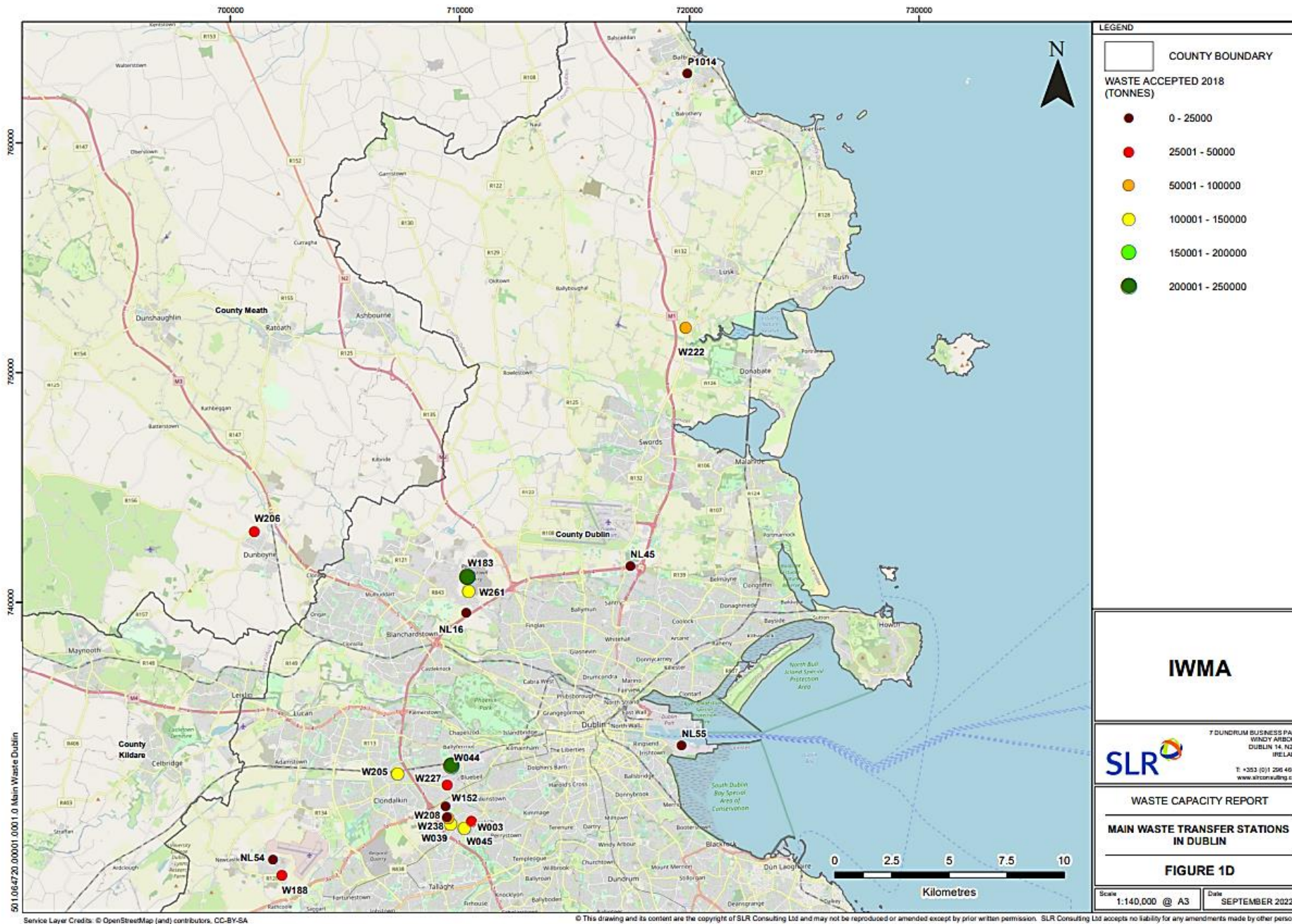
## 2. TRANSFER AND PRE-TREATMENT FACILITIES

### 2.4.3 Munster Data Discussion

The Data presented in the Table above suggests that utilised operational capacity in Munster increased from 77% in 2018 to **81%** in 2019. The operational capacity is lower than the licensed/permitted capacity, based on the following observations:

- ❑ We are informed by Beauparc (Panda/Greenstar) that their facility at Sarsfield Court near Glanmire to the NE of Cork City is only able to handle a maximum of 130Kt/a with its current operational set-up. More infrastructure is needed to achieve the full licensed capacity.
- ❑ We are also informed by Beauparc that their facility at Carrignard on the southern boundary of Waterford City has currently no spare capacity due to the operational set-up. We note that the maximum quantity handled at that facility in recent years was c.58Kt/a (2016), so we set that figure as the operational upper limit.
- ❑ We spoke to Ashgrove Recycling about their facility on the northern boundary of Cork City. We note that their capacity for MSW is limited in their licence to 25Kt/a, so we consider the spare capacity for MSW to be the gap between current MSW run rates and that limit. Other spare capacity is available for C&D waste only.
- ❑ Similarly, the Friends of the Earth Facility to the south of Waterford City has limited capacity for MSW, so we have estimated the MSW spare capacity without C&D spare capacity being included.
- ❑ Note that some other facilities may have reduced operational capacity, but it was beyond the scope of this report to discuss these details with every facility operator in the country. Hence, the 81% utilised operational capacity should be seen as a minimum level of utilisation with a maximum spare capacity of 19% in 2019.
- ❑ It is also notable that much of the spare capacity in Munster is not located in areas where it is likely to be most needed for contingency. For example, if we remove counties Clare and Kerry from the dataset, the (minimum) utilisation rate increases to 87% in 2019 and if we just look at Cork City and County, the (minimum) utilisation rate in 2019 was 91%. With growing waste volumes, that level of utilisation is not sustainable and is a major concern in terms of contingency. Some operators in Cork suggest that there is practically no spare capacity currently in transfer and pre-treatment facilities in the County. This is not inconsistent with our findings as our data presents minimum utilisation levels and maximum spare capacity rather than absolute numbers. Also, our data is now 3 years old, so spare capacity is likely to have reduced further.





## 2. TRANSFER AND PRE-TREATMENT FACILITIES

### 2.5 Dublin

#### 2.5.1 Location of Main Waste Transfer Stations in Dublin



## 2. TRANSFER AND PRE-TREATMENT FACILITIES

### 2.5.2 Dublin Data



SLR Code	Authority Ref:	Name	Location	County	MSW Capacity	Licensed or Permitted Capacity	Operational Capacity (inc. planning restrictions)	Waste In Total 2018	Waste In Total 2019	Spare Capacity 2018 Licence / Permit	Spare Capacity 2019 Licence / Permit	Actual Spare Capacity 2018	Actual Spare Capacity 2019
				Column Ref:	A	B	C	D	E	F (B - D)	G (B - E)	H (C - D)	I (C - E)
W044	W0044-02	Thorntons	Killeen Road	Dublin 10	219,000	250,000	250,000	248,664	248,448	1,336	1,552	1,336	1,552
W183	W0183-01	Panda/ Greenstar	Millennium Park	Dublin 11	225,000	270,000	270,000	227,060	217,613	42,940	52,387	42,940	52,387
W205	W0205-01	Greyhound	Crag Avenue	Dublin 22	244,000	250,000	250,000	149,446	162,961	100,554	87,039	100,554	87,039
W261	W0261-02	Panda	Cappagh Road	Dublin 11	199,000	250,000	250,000	143,832	249,943	106,168	57	106,168	57
W039	W0039-02	Panda	Ballymount Cross	Dublin 24	150,000	150,000	150,000	143,584	133,989	6,416	16,011	6,416	16,011
W003	W0003	Ballymount Baling Stn / Panda	Ballymount Road	Dublin 12	324,480	324,480	190,000	123,096	162,848	201,384	161,632	66,904	27,152
W222	W0222-01	AES	Blakes Cross, Lusk	Dublin	66,000	95,000	95,000	93,234	94,999	1,766	1	1,766	1
W045	W0045-01	Keywaste	Greenhills Road	Dublin	100,000	300,000	100,000	48,459	61,641	251,541	238,359	51,541	38,359
W188	W0188-01	Greenstar / Panda	Greenogue	Dublin	90,000	95,000	95,000	36,673	44,912	58,327	50,088	58,327	50,088
W227	W0227-01	Access Skip Hire (Thorntons)	JFK Ind Est	Dublin 12	75,000	95,000	95,000	30,991	27,411	64,009	67,589	64,009	67,589
NL16	WFP-FG-17-0001-04	Thorntons recycling	Ballycoolin	Dublin	24,500	49,500	49,500	24,484	39,604	25,016	9,896	25,016	9,896
NL45	WFP-FG-15-0001-03	Brian Redmond (M50 skips)	Cloghran	Dublin	24,500	24,500	24,500	18,208	20,490	6,292	4,010	6,292	4,010
W152	W0152-03	Oxigen	Robinhood Ind Est	Dublin 22	160,000	160,000	160,000	17,487	36,245	142,513	123,755	142,513	123,755
P1014	P1014-01	Pac-on (Thorntons)	Balbriggan	Dublin	50,000	50,000	50,000	11,570	14,226	38,430	35,774	38,430	35,774
NL54	WFP-DS-11-0002-06	Arneg Gate Limited (SkipTrans)	Greenogue	Dublin	2,654	7,054	7,054	7,802	8,019	-748	-965	-748	-965
NL55	WFP-DC-10-0020-02	Everyday Waste & Skip hire (All Away)	Ringsend	Dublin	3,700	20,000	13,500	7,693	9,529	12,307	10,471	5,807	3,971
W208	W0208-01	Oxigen	Merrywell Ind Est	Dublin 22	140,000	250,000	5,000	4,131	1,985	245,869	248,015	869	3,015
					<b>2,097,834</b>	<b>2,640,534</b>	<b>2,054,554</b>	<b>1,336,414</b>	<b>1,534,863</b>	<b>1,304,120</b>	<b>1,105,671</b>	<b>718,140</b>	<b>519,691</b>
									<b>Spare =</b>	49%	42%	<b>35%</b>	<b>25%</b>
									<b>Utilised =</b>	51%	58%	<b>65%</b>	<b>75%</b>

**Note:** All Figures are in tonnes per annum

global **environmental** and **advisory** solutions





## 2. TRANSFER AND PRE-TREATMENT FACILITIES

### 2.5.3 Dublin Data Discussion

The Data presented in the Table above suggests that utilised operational capacity in Dublin increased from 65% in 2018 to **75%** in 2019. We have also looked at throughput at the Dublin facilities in 2021 and can see that utilisation has increased to more than **82%**. Panda's facilities at Slane (Rathdrinagh) and Bray (Fassaroe) also serve the Dublin market and if these are added to the Dublin analysis, the utilisation rate increases to greater than **84%** in 2021. We consider this to be a critical situation that requires attention in the National Waste Management Plan. The operational capacity is significantly lower than the licensed/permitted capacity, based on the following observations:

- ❑ We are informed by Beauparc (Panda) that Ballymount Baling Station is limited to 190Kt/a by agreement with the owners of the site (South Dublin Co.). A higher quantity was accepted in 2021 as an emergency measure in response to a fire at Thorntons site in Killeen Road, but that extra capacity is not considered to be generally available.
- ❑ The Keywaste facility in Greenhills Road is limited in size and has never been capable of handling its full licensed capacity. Historically, it handled more than 100 Kt/a but that comprised mostly C&D waste, which is heavier than MSW. We estimate an upper operational limit of 100 Kt/a MSW for that site.
- ❑ The Oxigen facility at Merrywell in Ballymount is only operating as a civic amenity site after the main structures were destroyed in a fire. We understand that new planning permission is required to rebuild, so it currently has no capacity apart from the operation of the CA site.
- ❑ The Everyday (All Away) site in Ringsend is primarily focused on C&D waste and has very little capacity for MSW.
- ❑ Whilst there is currently some spare capacity at a few facilities in Dublin, they are not all suitable for residual MSW. Some capacity is only available for bulky waste or other non-odorous wastes, so operators have suggested that there is practically no spare capacity for handling of residual MSW and other potentially odorous wastes.

In addition, there is major concern in the waste industry over the re-zoning of the Ballymount area from 'Enterprise & Employment' to 'Regeneration' with residential led mixed development. Ballymount has been the main centre for waste management facilities in Dublin for decades and waste transfer stations are not very compatible with residential developments.

If all the waste facilities in the 'Regeneration' zone were removed from our analysis, Dublin would be over-utilised to a level of 111%, based on 2021 throughput. It is therefore critical for waste management in Dublin that these facilities continue to operate, despite the change in zoning. We recognize that non-conforming facilities can continue to operate in this new zoning, so we are not suggesting that they will be removed, but some of these facilities are outside the control of the operators and some may need expansion in the future.





## 2. TRANSFER AND PRE-TREATMENT FACILITIES

### 2.6.2 Rest of Leinster Data (Page 1 of 2)



SLR Code	Authority Ref:	Name	Location	County	MSW Capacity	Licensed or Permitted Capacity	Operational Capacity (inc. planning restrictions)	Waste In Total 2018	Waste In Total 2019	Spare Capacity 2018 Licence / Permit	Spare Capacity 2019 Licence / Permit	Actual Spare Capacity 2018	Actual Spare Capacity 2019
				Column Ref:	A	B	C	D	E	F (B - D)	G (B - E)	H (C - D)	I (C - E)
W140	W0140-05	Panda	Rathdrinagh	Meath	120,000	250,000	250,000	249,662	211,187	338	38,813	338	38,813
W053	W0053-03	Panda/ Greenstar	Fassaroe	Wicklow	143,560	200,000	200,000	184,953	188,022	15,047	11,978	15,047	11,978
P1015	P1015-03	Glanway	Port of Waterford	Kilkenny	193,500	193,500	193,500	106,404	115,587	87,096	77,913	87,096	77,913
W131	W0131-02	Midland (AES)	Clonmagaddan	Meath	71,250	95,000	95,000	56,858	73,228	38,142	21,772	38,142	21,772
W194	W0194-02	AES	Kyletalesha	Laois	80,000	99,000	99,000	56,830	45,764	42,170	53,236	42,170	53,236
W144	W0144-01	Oxigen	Coes Road	Louth	70,000	90,000	90,000	50,697	51,470	39,303	38,530	39,303	38,530
W206	W0206-01	Thorntons	Dunboyne Ind Est	Meath	21,500	50,000	50,000	49,969	49,645	31	355	31	355
W158	W0158-01	Ray Whelan	Cappanaboe	Laois	65,000	70,000	70,000	37,692	40,675	32,308	29,325	32,308	29,325
W220	W0220-01	Greenstar / Panda	Ramstown	Wexford	30,000	30,000	30,000	29,827	29,955	173	45	173	45
NL28	WFP-KK-19-0003-03	Greenstar / Panda	Hebron Ind Est	Kilkenny	25,000	25,000	25,000	26,540	28,387	-1,540	-3,387	-1,540	-3,387
W169	W0169-01	Mulleady	Cloonagh	Longford	68,970	95,000	95,000	24,168	26,459	70,832	68,541	70,832	68,541
NL21	WFP-WH-2022-0002-00	Allied Recycling	Oldcastle	Westmeath	6,500	7,240	7,240	23,818	24,084	-16,578	-16,844	-16,578	-16,844
NL39	WFP-WM-2016-0004-01	Barna Waste	Athlone	Westmeath	24,000	24,000	24,000	23,500	27,202	500	-3,202	500	-3,202
NL19	WFP-LH-16-0001-01	Exomex (McElvaneys / Panda)	Dundalk	Louth	25,000	25,000	25,000	23,412	24,840	26,588	25,160	1,588	160

**Note:** All Figures are in tonnes per annum



## 2. TRANSFER AND PRE-TREATMENT FACILITIES

### 2.6.2 Leinster Data (Page 2 of 2)



SLR Code	Authority Ref:	Name	Location	County	MSW Capacity	Licensed or Permitted Capacity	Operational Capacity (inc. planning restrictions)	Waste In Total 2018	Waste In Total 2019	Spare Capacity 2018 Licence / Permit	Spare Capacity 2019 Licence / Permit	Actual Spare Capacity 2018	Actual Spare Capacity 2019
				Column Ref:	A	B	C	D	E	F (B - D)	G (B - E)	H (C - D)	I (C - E)
W197	W0197-02	Mulleady	Mullingar Bus Pk	Westmeath	40,000	50,000	50,000	23,199	31,081	26,801	18,919	26,801	18,919
W229	W0229-01	Goff Recycling (AES)	Ballygillane Big	Wexford	19,000	23,000	23,000	22,716	20,469	284	2,531	284	2,531
NL18	WFP-KE-21-0106-01	Allied Recycling	Naas	Kildare	25,000	25,000	20,000	22,260	18,256	2,740	6,744	-2,260	1,744
W258	W0258	Murray Waste	Ferns	Wexford	19,460	24,500	24,500	19,336	25,015	5,164	-515	5,164	-515
NL27	WFP-KK-21-0004-04	Doheny Wheelie Bins & Recycling	Castle Inch	Kilkenny	15,000	15,000	15,000	13,238	13,464	1,762	1,536	1,762	1,536
W284	W0284-01	O'Toole Composting Ltd.	Ballintrane	Carlow	20,000	20,000	20,000	12,396	7,955	7,604	12,045	7,604	12,045
NL52	WFP-WH-2021-0005-01	Chris Lynch Waste Management Ltd	Mullingar	Westmeath	9,834	24,560	24,560	11,172	19,661	13,388	4,899	13,388	4,899
NL20	WFP-LH-14-0004-03	Ecological Waste Management (McElvaney's / Panda)	Dundalk	Louth	25,000	25,000	25,000	9,769	17,936	15,231	7,064	15,231	7,064
NL53	WFP-LH-08-0002-03	Gotvista Ltd (Orange Skips)	Drogheda	Louth	18,000	18,000	18,000	9,721	8,248	8,279	9,752	8,279	9,752
NL56	WFP-LH-15-0001-02	Express Mini Mix & Skip Hire Ltd	Ardee	Louth	25,000	25,000	25,000	3,353	4,744	21,647	20,256	21,647	20,256
NL57	WFP-MH-09-0008-04	OMD Waste Recycling Ltd.	Rathcore	Meath	10,000	20,000	20,000	3,280	2,933	16,720	17,067	16,720	17,067
NL58	WFP-WH-2017-0100-00	Athcast Ltd	Mullingar	Westmeath	18,400	23,900	23,900	916	1,965	22,984	21,935	22,984	21,935
					<b>1,168,974</b>	<b>1,527,700</b>	<b>1,522,700</b>	<b>1,083,290</b>	<b>1,100,277</b>	<b>452,014</b>	<b>439,468</b>	<b>447,014</b>	<b>434,468</b>
									<b>Spare =</b>	29%	28%	<b>29%</b>	<b>28%</b>
									<b>Utilised =</b>	71%	72%	<b>71%</b>	<b>72%</b>

**Note:** All Figures are in tonnes per annum

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## 2. TRANSFER AND PRE-TREATMENT FACILITIES

### 2.6.3 Leinster Data Discussion

- ❑ The Data presented in the Table above suggests that utilised operational capacity in Leinster increased from 71% in 2018 to **72%** in 2019.
- ❑ The operational capacity is only slightly lower than the licensed/permitted capacity, due to a planning restriction on the Allied Recycling facility in Naas.
- ❑ The Glanway facility in Belview Port (part of Port of Waterford) is licensed for a larger throughput (231,500t/a), but we only included the non-hazardous licensed tonnage in our calculations.
- ❑ It is notable that Leinster is a large province, so available capacity in some parts of the province is of little relevance to waste arisings at the other end of the province. However, the data does suggest some spare capacity in north Leinster and South Leinster.



Thornton's Dunboyne Facility

## 2. TRANSFER AND PRE-TREATMENT FACILITIES

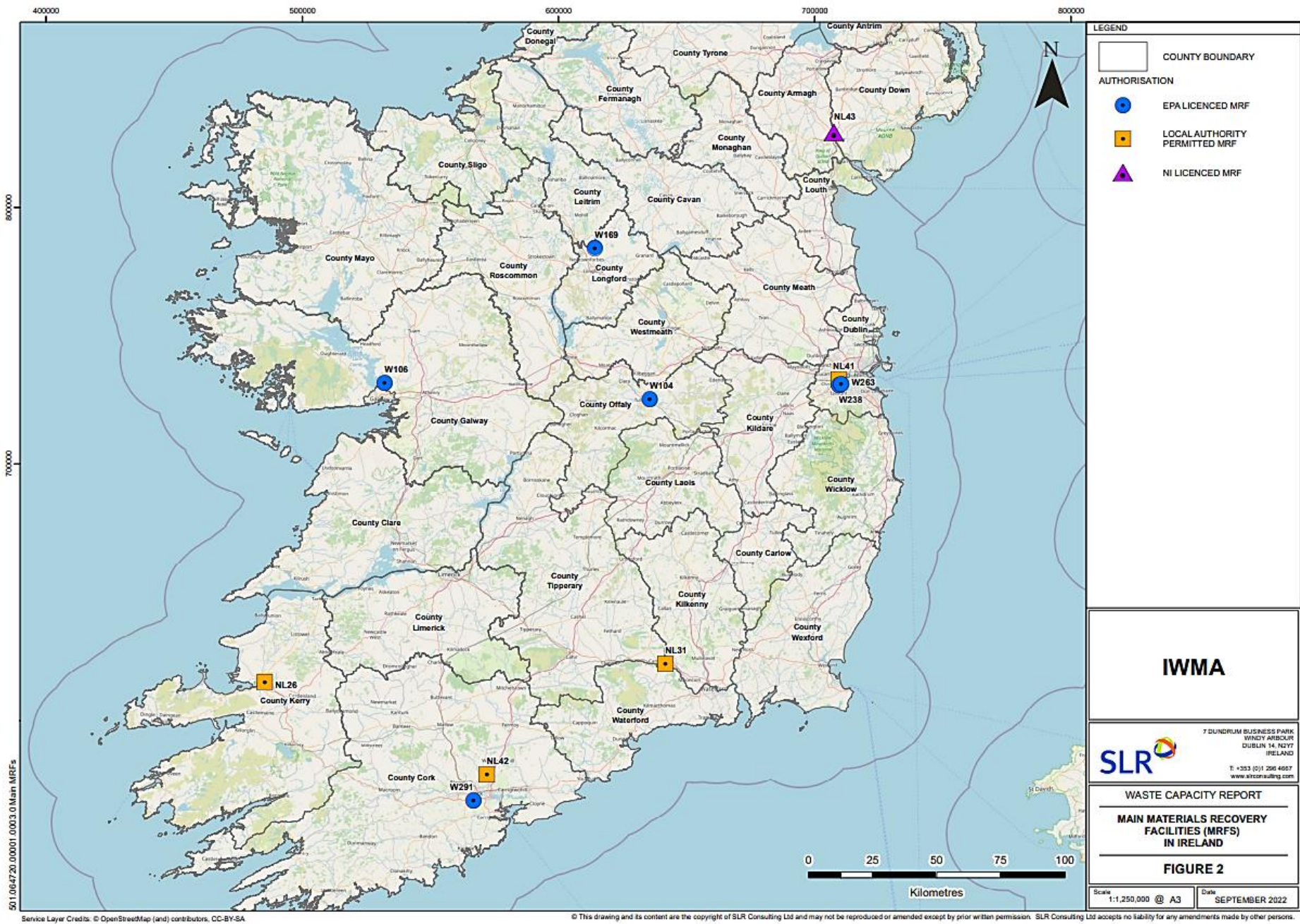


### 2.7 Conclusions on Transfer & Pre-Treatment

The Data presented in this Chapter of the report suggests the following:

- ❑ The maximum operational capacity for MSW transfer and pre-treatment facilities in Ireland is approximately 5.36 million tonnes per annum (Mt/a), which is roughly 0.92 Mt/a lower than the licensed/permitted capacity of these facilities. This capacity includes some C&D and other waste types. We estimate that 4.95 Mt/a of this capacity is available for transfer and pre-treatment of MSW.
- ❑ We estimate that these facilities accepted 3.73 Mt of total waste in 2018 and 4.02 Mt in 2019, suggesting utilisation rates of 70% in 2018 and **75%** in **2019** (based on full capacity, not just MSW capacity).
- ❑ This overall level of utilisation is high and rising quite rapidly due to growth in the economy, including the construction sector and the need to recycle and recover more materials, which can result in wastes being handled at more than one transfer/pre-treatment facility. Some areas are under more pressure than others, so we attempt to identify the most critical areas, as follows:
  - ❑ Cork City and County was estimated at more than 91% utilisation in 2019 and is very close to full saturation now in 2022.
  - ❑ Dublin City was more than 84% utilised in 2021 when the Bray and Slane facilities are included in the dataset. There is also major concern over the threat to waste management infrastructure in Dublin from the re-zoning of the Ballymount Area as part of the City Edge Project. It is important that the facilities in and around Ballymount are protected. Removal of any of the large facilities in Ballymount is likely to lead to a waste management crisis in Dublin.
  - ❑ Ulster and Munster appear to have higher utilisation rates than Connacht and Leinster (excluding Dublin), but each province appears to have a utilisation rate higher than 70% in 2019, which we expect to be significantly higher in 2022 as there has been very few new transfer and pre-treatment facilities developed in the last 3 years.
- ❑ It is clear from the evidence presented in this Chapter of the report that the National Waste Management Plan should support the development of new waste transfer and pre-treatment capacity throughout Ireland and particularly in Cork and Dublin. The evidence suggests that existing capacity is reaching critical levels, particularly in Cork and Dublin and will not cope with future waste management needs without the development of further capacity.





### 3. MATERIALS RECOVERY FACILITIES (MRFs)

#### 3.1 Location of Main MRFs in Ireland

### 3. MATERIALS RECOVERY FACILITIES (MRFS)

#### 3.2 MRF Data



SLR Code	Authority Ref:	Name	Location	County	MSW Capacity	Licensed or Permitted Capacity	Capacity for Mixed Dry Recyclables Processing	Waste In Total 2018	Waste In Total 2019	Spare Capacity 2018 Licence / Permit	Spare Capacity 2019 Licence / Permit
				Column Ref:	A	B	C	D	E	F (B - D)	G (B - E)
W106	W0106-02	Barna Waste	Carrowbrowne	Galway	96,000	166,000	20,000	111,072	133,611	54,928	32,389
W291	W0291-02	Forge Hill Recycling MRF	Forge Hill	Cork	100,000	100,000	100,000	89,185	91,404	10,815	8,596
W238	W0238-01	Dublin City MRF (Panda)	Merrywell Ind Est	Dublin 12	100,000	100,000	100,000	77,823	90,784	22,177	9,216
W104	W0104	AES	Tullamore	Offaly	55,200	60,000	60,000	58,725	60,503	1,275	-504
NL31	WFP-TS-12-0002-04	Quality Recycling (Wiser)	Carrick on Suir	Tipperary	50,000	50,000	50,000	47,813	46,853	2,187	3,147
NL41	WFP-DC-10-0021-03	Thorntons MRF	Parkwest	Dublin	50,000	50,000	50,000	47,744	49,582	2,256	418
W169	W0169	Mulleady	Cloonagh	Longford	68,970	95,000	20,000	24,168	5,867	70,832	89,133
NL26	WFP-KY-10-001-03	Dillon	Tralee	Kerry	50,000	50,000	50,000	49,405	53,934	595	-3,934
W263	W0263-01	Irish Packaging Recycling / Panda	Ballymount Road	Dublin 12	100,000	150,000	150,000	105,462	111,550	44,538	38,450
NL42	WFP-CK-10-0047-03	Starrus Glyntown Commercial MRF	Glanmire	Cork	24,500	24,500	24,500	30,446	4,493	-5,946	20,007
				<b>Total =</b>	<b>694,670</b>	<b>845,500</b>	<b>624,500</b>	<b>641,843</b>	<b>648,582</b>	<b>203,657</b>	<b>196,918</b>
									<b>Spare =</b>	<b>24%</b>	<b>23%</b>
									<b>Utilised =</b>	<b>76%</b>	<b>77%</b>

**Note:** All Figures are in tonnes per annum



### 3. MATERIALS RECOVERY FACILITIES (MRFS)

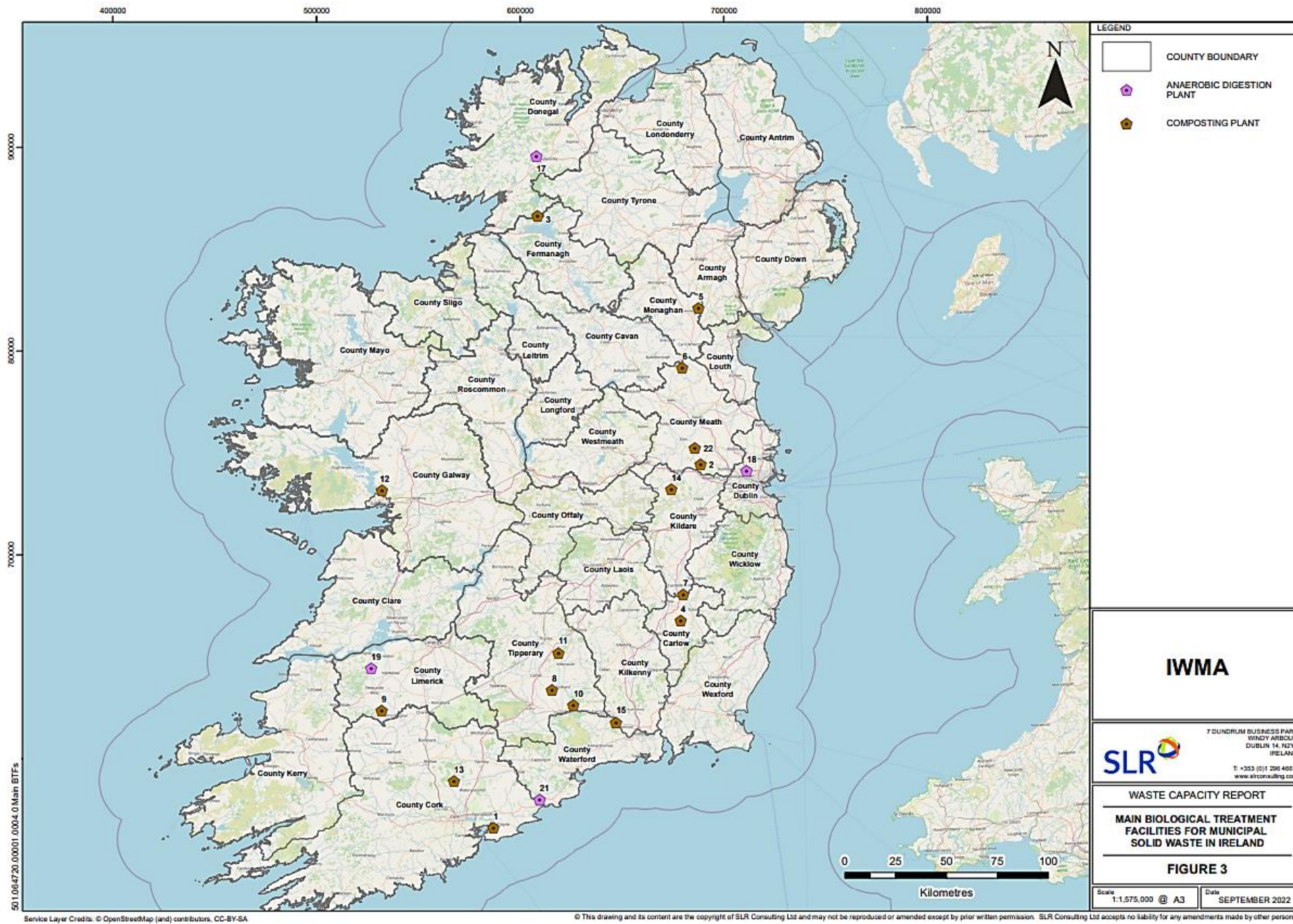
#### 3.3 Discussion and Conclusions on MRF Capacity

- ❑ The Data presented in the Table above suggests that utilised operational capacity in the MRFs in Ireland increased from 76% in 2018 to **77%** in 2019.
- ❑ The capacity calculations are complicated by the fact that some of the MRFs form part of larger facilities. For example, for Barna Waste, we have considered the spare capacity for the full facility, but it should be noted that the MRF is a small part of the operations at that site.
- ❑ Similarly, the Mulleady's site in Longford has a lot of spare capacity, but not necessarily for MRF Operations.
- ❑ The Irish Packaging and Glyntown sites (bottom two rows) process commercial dry recyclables only.
- ❑ If we remove the spare capacity at Barna, Mulleady's and the two commercial waste MRFs (in Dublin & Cork), utilisation rises to **96%** based on 2019 throughputs. This demonstrates that there is urgent need for more MRF capacity proximal to the largest urban centres across Ireland, particularly in the context of increased capture of dry recyclables in future years.
- ❑ The re-zoning of the Ballymount area from 'Enterprise & Employment' to 'Regeneration' with residential led mixed development is also of major concern in the context of National and Dublin MRF Capacity. The Dublin City Council MRF, operated by Panda is clearly critical infrastructure in this context and must be protected in the National Waste Management Plan as re-purposing of this site would have a devastating impact on household waste recycling in Ireland.



Forge Hill Recycling MRF in Cork





## 4. BIOLOGICAL TREATMENT FACILITIES

### 4.1 Location of Main Biological Treatment Facilities in Ireland

## 4. BIOLOGICAL TREATMENT FACILITIES

### 4.2 Biological Treatment Facilities Data (1 of 2)

SLR Code	Authority Ref:	Name	Location	County	Operational Biological Treatment Capacity	Biological Treatment waste In Total 2018	Biological Treatment waste In Total 2019	Spare Capacity 2018	Spare Capacity 2019
				Column Ref:	A	B	C	D (A – B)	E (A – C)
1	WFP-CK-09-0018-04	CTO Env. Solutions	Midleton	Cork	7,500	6,609	6,078	891	1,422
2	P1013-01	Enrich Environmental	Kilcock, Co.	Meath	50,000	49,951	49,879	49	121
3	WFP-DL-17-004-05	Enviro Grind Ltd.	Pettigo	Donegal	10,000	10,742	12,835	-742	-2,835
4	W0284-01	O'Toole Composting Ltd.	Ballintrane	Carlow	30,000	18,288	20,635	11,712	9,365
5	WFP-MN-11-0004-03	Terralift Ireland Ltd.	Castleblayney	Monaghan	9,000	0	0	9,000	9,000
6	W0195-02	Thorntons Recycling	Kilmainhamwood	Meath	40,000	34,027	38,312	5,973	1,688
7	P1009-01	Waddock Composting	Killamaster	Carlow	24,900	15,000	11,609	9,900	13,291
8	W0270-02	Milltown Composting Ltd	Cashel	Tipperary	50,000	37,306	47,614	12,694	2,386
9	WFP/L/2019/23A/R10	Cremin Farm Compost	Charleville, Co.	Limerick	10,000	12,534	12,384	-2,534	-2,384
10	WFP-TS-10-0002-06	OD Agri Ltd	Clonmel	Tipperary	23,400	23,478	23,397	-78	3
11	W249-01	Acorn Recycling (Panda)	Littleton	Tipperary	45,000	46,872	44,793	-1,872	207
12	W0106-02	Barna Waste & Recycling	Carrowbrowne	Galway	20,000	16,289	16,847	3,711	3,153

**Note:** All Figures are in tonnes per annum

## 4. BIOLOGICAL TREATMENT FACILITIES

### 4.2 Biological Treatment Facilities Data (2 of 2)

SLR Code	Authority Ref:	Name	Location	County	Operational Biological Treatment Capacity	Biological Treatment waste In Total 2018	Biological Treatment waste In Total 2019	Spare Capacity 2018	Spare Capacity 2019
				Column Ref:	A	B	C	D (A – B)	E (A – C)
13	W0180-01	McGill Environmental	Glenville, Co.	Cork	20,800	16,977	19,160	3,823	1,640
14	W0201-03	Bord Na Mona	Drehid, Co.	Kildare	25,000	24,828	24,987	172	13
15	W0287-01	Ormonde Organics	Portlaw	Waterford	40,000	39,959	38,052	41	1,948
17	P1004-02	Glenmore Biogas	Ballybofey	Donegal	90,000	37,510	52,121	52,490	37,879
18	P0993-02	Huntstown Bioenergy Ltd	Huntstown	North Dublin	99,000	0	327	99,000	98,673
19	WFP/L/2022/50/R5/T1	Green Gas Ltd	Shanagolden, Co.	Limerick	24,000	14,086	13,974	9,914	10,026
20	W0245-01	McGill Environmental (Molaisín)	Cappoquin	Waterford	12,000	3,965	7,200	8,035	4,800
21	W0211-02	ERAS Eco	Youghal	Cork	40,000	17,238	24,115	22,762	15,885
22	WFP/MH/17/0001/01	Windtown Galtrim Limited	Summerhill	Meath	17,000	0	10,182	17,000	6,818
					<b>687,600</b>	<b>425,659</b>	<b>474,501</b>	<b>261,941</b>	<b>213,099</b>
							<b>Spare =</b>	<b>37%</b>	<b>30%</b>
							<b>Utilised =</b>	<b>63%</b>	<b>70%</b>

**Note:** All Figures are in tonnes per annum



## 4. BIOLOGICAL TREATMENT FACILITIES

### 4.3 Discussion and Conclusions on Biological Treatment Facilities

The Data presented in the Table above suggests that utilised operational capacity in the Biological Treatment Plants in Ireland increased from 63% in 2018 to **70%** in 2019. Two facilities appear to have significant volumes of spare capacity, but there are some issues with these facilities, as follows:

- ❑ The Huntstown Bioenergy Plant in Dublin has been slow to reach its fully operational stage and has an extended commissioning period. We expect this to be resolved in time.
- ❑ Glenmore Biogas in Donegal was also slow to reach operational stage and we are unsure if it is fully operational now. It accepts agricultural and agri-industry waste as well as MSW biowaste. It's location in Donegal is well removed from the major urban centres in Ireland where generation of food waste is concentrated.
- ❑ If we remove the spare capacity at Huntstown and Glenmore from our dataset, utilisation rises to **90%** based on 2019 throughputs.
- ❑ Biowaste is growing rapidly as is evident from the difference between 2018 and 2019 throughputs. This demonstrates that there is urgent need for more Biological Treatment capacity proximal to the largest urban centres across Ireland, as we need to:
  - ❑ increase capture of additional biowaste in future years and
  - ❑ increase processing of the biodegradable fraction of MSW to capture recyclables and to reduce biodegradability, both required by EU Directives.

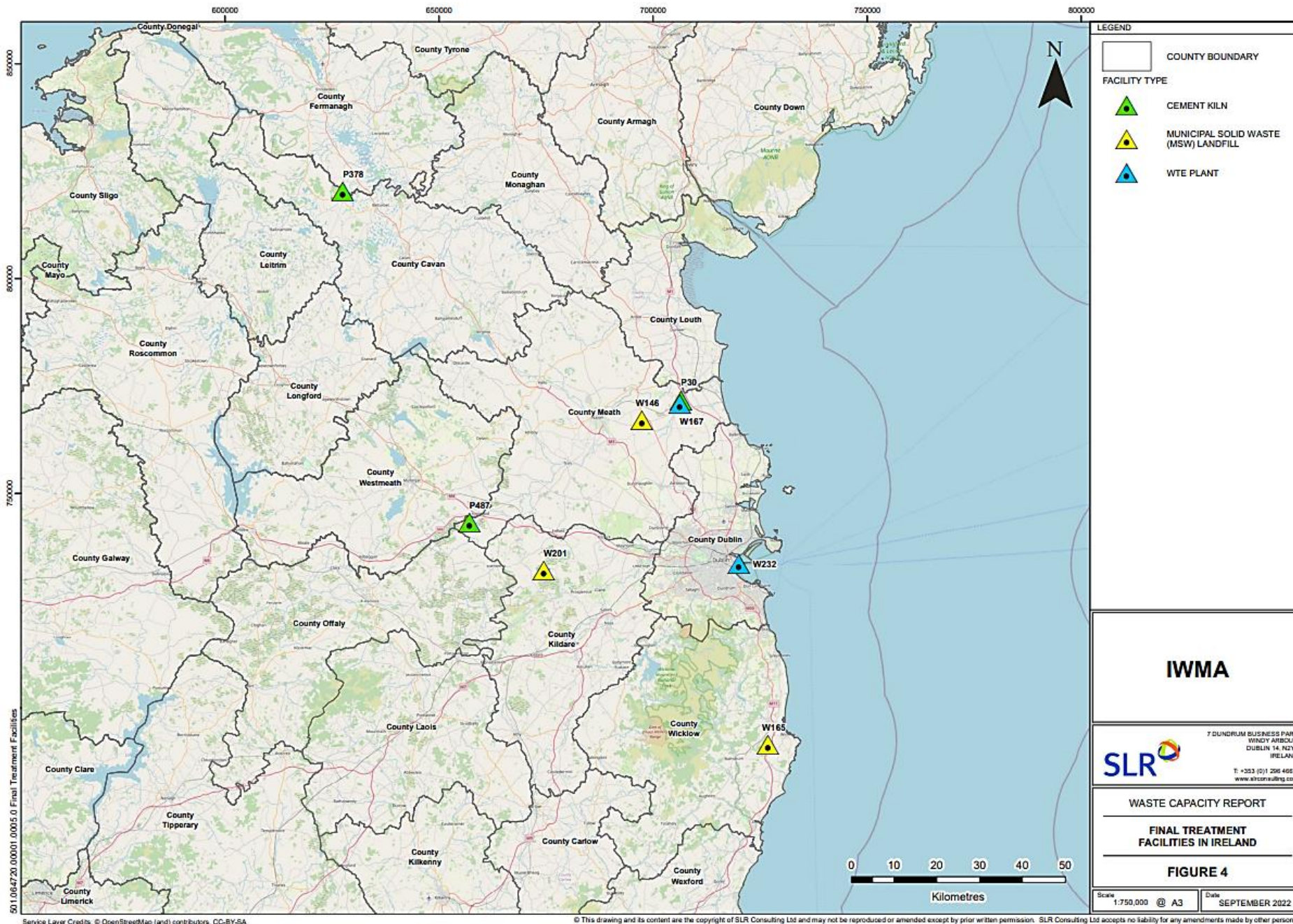


Model of Huntstown Bioenergy Plant in Dublin



## 5. FINAL TREATMENT FACILITIES

### 5.1 Location of Main Final Treatment Facilities in Ireland



## 5. FINAL TREATMENT FACILITIES

### 5.2 Final Treatment Facilities Data

SLR Code	Authority Ref:	Name	Location	County	Facility Type	Capacity (t/a)
W201	W0201-03	Bord Na Mona (AES)	Drehid	Kildare	Landfill	120,000
W165	W0065-02	Ballynagran Landfill Ltd	Ashford	Wicklow	Landfill	150,000
W146	W0146-02	Panda	Knockharley	Meath	Landfill	175,000
W167	W0167-03	Indaver	Carranstown	Meath	WtE Plant	235,000
W232	W0232-01	Dublin Waste to Energy Ltd	Poolbeg	Dublin	WtE Plant	600,000
P487	P0487-07	Lagan Cement	Kinnegad	Meath	Cement Kiln	105,000
P30	P0030-06	Irish Cement	Platin, Duleek	Meath	Cement Kiln	295,000
P378	P0378-03	Quinn Cement	Ballyconnell	Cavan	Cement Kiln	127,875
					<b>Total =</b>	<b>1,807,875</b>

Note: All Figures are in tonnes per annum



# 5. FINAL TREATMENT FACILITIES

## 5.3 Discussion and Conclusions on Final Treatment Facilities

We have not presented throughput data for final treatment facilities as it is clear that they are over-subscribed, resulting in the Net Export of the following tonnages of MSW in recent years:

Year	Export	Import	Net Export
2021	358,187 t	31,637 t	326,550 t
2020	334,853 t	38,910 t	295,943 t
2019	370,346 t	38,570 t	331,776 t
2018	272,175 t	26,376 t	245,799 t

The Regional Waste Management Planning Offices monitor residual MSW generation and treatment. They report the results on a quarterly basis. It was not considered necessary to repeat that exercise in this report. The data presented above was sourced from those RWMPO quarterly reports and from the NTFSO databases.

Note that Landfills and Waste to Energy Plants are designed as waste management facilities. However, Cement Kilns are designed to produce cement, so the use of MSW derived SRF as a fuel is a secondary function and can be switched off when the primary function of making cement is not required. This occurred during the COVID pandemic and could occur again in the future.

The constant reliance on the export of large quantities of residual MSW proves that more residual waste treatment capacity is needed in Ireland.

It is also notable that existing landfill capacity has a finite lifespan and even with a limit on landfilling of 10% of MSW by 2035, there will be need for new landfill capacity and that will require further consents in the future, including consents for contingency capacity.



Dublin Waste to Energy Plant at Poolbeg

## 6. OVERALL CONCLUSIONS & RECOMMENDATIONS (Page 1 of 2)

- ❑ The evidence presented in this report shows that the existing transfer and pre-treatment waste infrastructure in Ireland was heavily utilised in 2019 (>75%), with a significant increase in utilisation rates from 2018 to 2019.
- ❑ Some partial analysis of 2021, suggests that the utilisation rates had increased further by that year and there is concern that some areas, such as Cork and Dublin, are at (or very close to) saturation point.
- ❑ **We recommend that the new National Waste Management Plan (NWMP) encourages the provision of additional transfer and pre-treatment waste management capacity and new infrastructure across Ireland in general and in Cork and Dublin in particular.**
- ❑ The evidence presented in this report also shows that MRF capacity in Ireland is at (or very close to) saturation point in most of the country. There is some scope to increase capacity within a couple of existing large facilities that handle a wider range of materials (e.g. Barna, Mulleadys), but the location of these facilities is not suitable for serving the east and south of the country where spare capacity is very low.
- ❑ **We recommend that the new NWMP encourages the provision of additional MRF capacity and new infrastructure across Ireland.**
- ❑ The evidence presented in this report shows that Biological Treatment capacity in Ireland was more than 71% utilised in 2019, but that figure is heavily reliant on two facilities (Glenmore and Huntstown). Glenmore is in Donegal, so is not considered to be available in a practical sense for waste arisings in the southern half of the island of Ireland, where the largest quantities of biowaste are generated.

## 6. OVERALL CONCLUSIONS & RECOMMENDATIONS (Page 2 of 2)

- ❑ As the need for biological treatment is growing rapidly for both source segregated organics and MSW fines to comply with EU Directives, **we recommend that the new NWMP encourages the development of additional capacity and new infrastructure in this area.**
- ❑ The evidence of residual MSW exports presented in the Quarterly Reports published by the RWMPOs and summarised in this report, clearly shows that Ireland has insufficient capacity for final treatment of residual MSW.
- ❑ **We recommend that the NWMP encourages the provision of more final treatment infrastructure across the country.**
- ❑ **We also recommend that the NWMP seeks that all County Development Plans promote the development of all types of waste management infrastructure within enterprise and/or industrial (or other) zoning objectives.** If existing plans do not adequately allow for the provision of waste management infrastructure in zoned lands, we recommend the initiation of variations of those plans to make it possible for companies to develop necessary waste management infrastructure across the country.
- ❑ **Finally, we recommend that the NWMP promotes the provision of contingency capacity in all the areas mentioned above,** as the temporary or permanent loss of one large facility could have a severe impact on waste management in Ireland. The temporary loss of a large transfer station in 2021 due to a fire, led to the use of emergency measures to handle diverted wastes, so this is a real and continuous risk that must be addressed in the NWMP.



# THANK YOU

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