North Wales – Denbigh Quarry – Inert Market

Inert landfill capacity in North Wales is rapidly diminishing, and the need for new void space is now urgent.

In 2019, North Wales generated an estimated 770,000 tonnes of construction, demolition, and excavation (CDE) waste, accounting for 22% of Wales' total. Approximately 34% of this waste, around 261,000 tonnes, was soil-based, typically requiring disposal at inert landfill sites.

To put this in context:

- 3.3 million tonnes of aggregate were consumed in North Wales in 2019.

- As a comparable, 0.23ts of CDE waste was created vs a tonne of aggregate used, of which 0.07ts likely ended up in an inert landfill.

- This equates to ~1 tonne of CDE waste per capita in North Wales (population ~703,000)., or 0.35ts of inert tip material per capita.

Until recently, Breedon's Maes Mynan site near Mold provided a vital outlet for inert waste, operating since 2012. It closed in summer 2025 after reaching capacity. In its final years, it was handling 110,000 tonnes per annum, following a permit variation in 2023.

With Maes Mynan now closed, waste is being diverted to:

- Llanddulas – adding 21 miles of haulage

- Cheshire and Staffordshire – increasing transport costs and carbon impacts

Key regional operators such as Thorncliffe and D Morgan PLC (handling ~70,000 tpa) confirm a severe lack of local inert landfill options. This is driving up development costs and placing pressure on recycling operations, which rely on landfill for non-recyclable residues to maintain throughput.

Importantly, North Wales is forecast to grow by 5% annually in development activity. Taking the total aggregate usage in 2019, 3.4mts, this equates to c.4.7mts in 2026, or 350kts per year of inert material. The scale of planned construction around Denbigh alone will generate substantial volumes of inert waste that must be managed responsibly and locally.

The below figure shows the future development around Denbigh. This amount of development will lead to an inevitable requirement for an inert tipping facility.