

# LIMERICK DEVELOPMENT PLAN 2022-2028

## Core Strategy

Monitoring Report 2022 - 2023

6th October 2023



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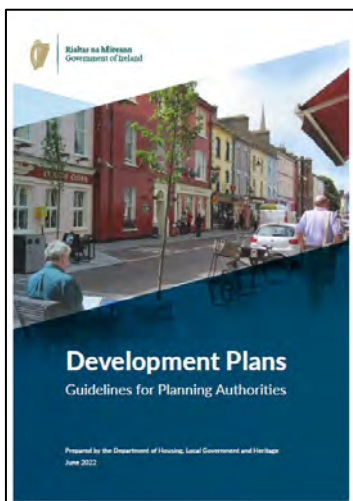
## 1. Introduction

In accordance with the provisions of Section 12 of the Planning and Development Act 2000 (as amended), following a two year statutory process, the Limerick Development Plan 2022-2028 (hereafter referred to as the Plan) was adopted by the Elected Members of Limerick City and County Council on the 17th of June 2022. The Plan came into effect on the 29th of July 2022, six weeks after the date of adoption. On the 4th of November 2022, a Section 31 Ministerial Direction was issued in respect of a number of Material Amendments, directing that the Plan be altered with respect to the zoning of a number of sites at risk of flooding in Limerick City and Suburbs.



The Plan envisages Limerick as the principal centre within the Mid-West Region, with the potential to generate and be the focus of significant employment and housing growth. The Plan sets out a blueprint for the development of Limerick to 2028 and beyond, in the context of higher tier regional and national planning policy. In this regard, the Plan is consistent with the policies and objectives of the National Planning Framework (NPF) and the Regional Spatial and Economic Strategy for the Southern Region (RSES).

Chapter 2, Core Strategy of the Plan's Volume 1: Written Statement, sets out the projected population and household growth for Limerick in accordance with the requirements of the NPF Implementation Roadmap, the RSES and the Economic and Social Research Institute's (ESRI) 'Regional Demographics and Structural Housing Demand at a County Level'. The housing supply targets outlined in the Core Strategy were prepared utilising the ESRI forecast in accordance with the 'Housing Supply Target Methodology for Development Planning – Guidelines for Planning Authorities' (2020). The ESRI report sets out a forecast of an additional 15,591 no. residential units in Limerick City and County over the Plan period 2022 – 2028.



The 'Development Plans Guidelines for Planning Authorities' were issued by the Department of Housing, Local Government and Heritage in June 2022. Section 10.3 of the Guidelines sets out the requirement for Development Plan monitoring, comprising an annual Core Strategy Monitoring Report and a Two Year Progress Report on the progress made towards achieving the Plan's objectives.

This report comprises the annual Core Strategy Monitoring Report for 2022 – 2023 and indicates the development trends relative to the Core Strategy of the Plan in the first year following its adoption, in accordance with the requirements of the 'Development Plans Guidelines for Planning Authorities'.

## 2. Core Strategy

Chapter 2, Core Strategy of Volume 1: Written Statement sets out the Core Strategy of the Plan. The Core Strategy comprises maps and a table setting out a quantitative based strategy for the spatial development of Limerick across the settlement hierarchy. For ease of reference, these maps and table are set out under Section 2.1 below.

The Core Strategy informed the overall framework for the objectives and policies throughout the Plan. The Core Strategy provides a transparent and evidence-based rationale for the quantity of land zoned for ‘New Residential’ and for ‘Mixed Use’ type development involving a residential component, that is required to cater for population growth over the lifetime of the Plan period, at a settlement level. In the process of identifying lands for zoning, considerations included strategic planning policies such as compact growth, sustainable mobility and the capacity of infrastructural services to accommodate development. The key focus of the Core Strategy is to ensure that there is an appropriate balance between the supply of zoned and serviced land for the projected housing demand and the availability of employment opportunities, educational facilities and social infrastructure.

### 2.1 Core Strategy Maps and Tables

The following maps and table are extracts from Chapter 2, Core Strategy of Volume 1: Written Statement and comprise the Core Strategy of the Plan:

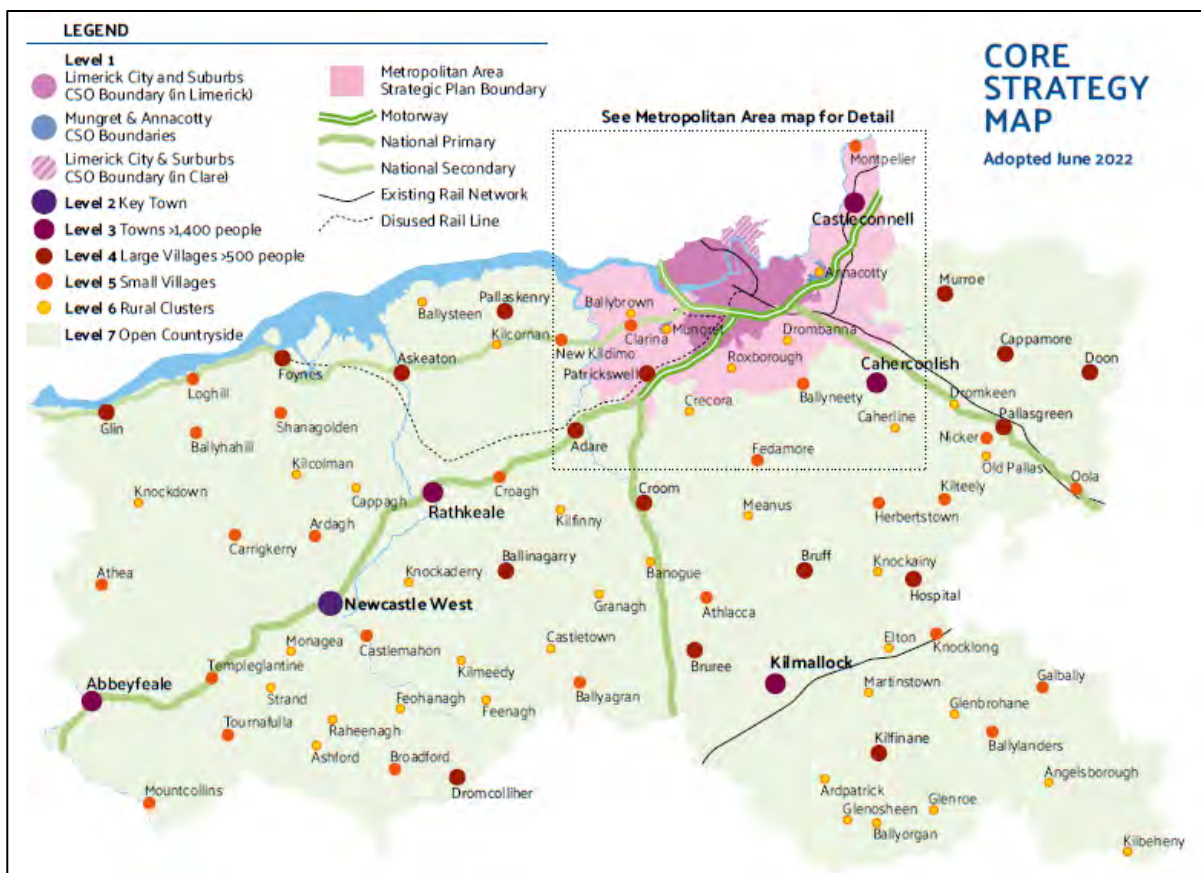
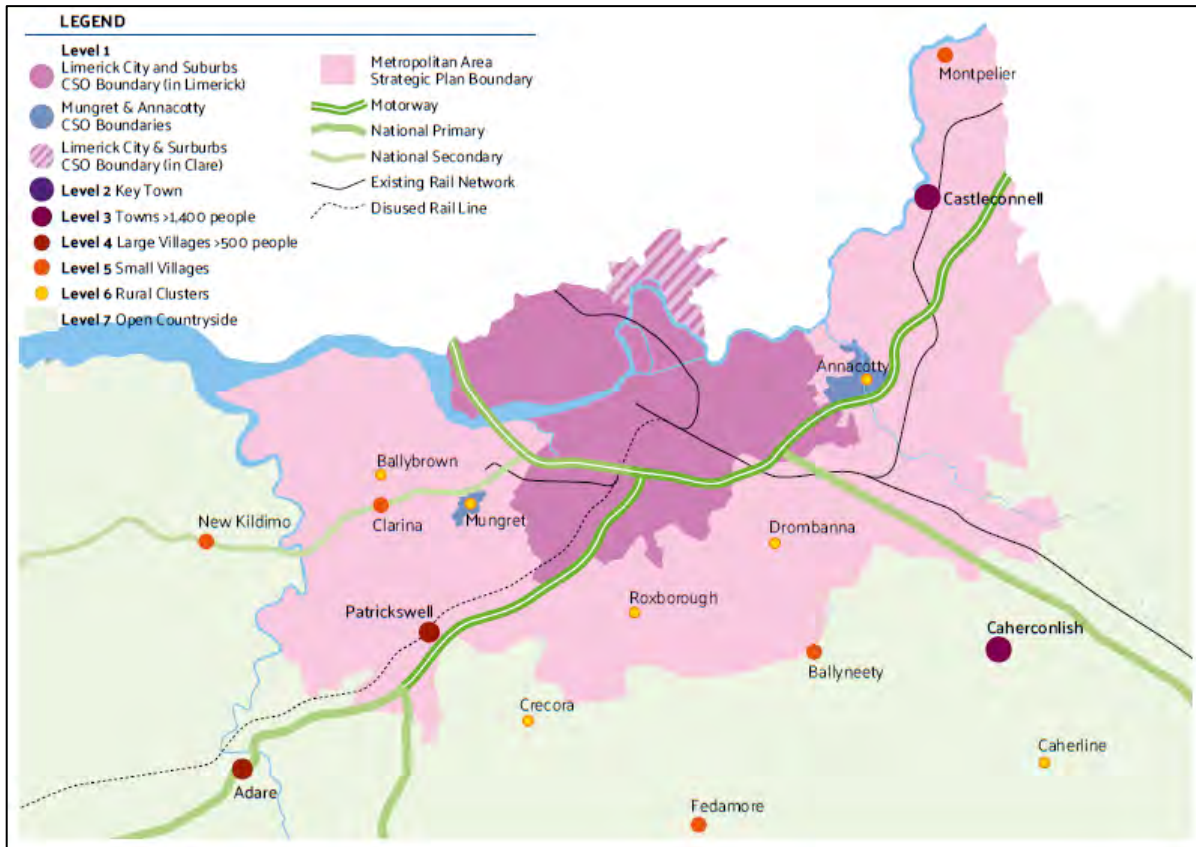


Figure 1: Extract of Map 2.3 Core Strategy Map, Chapter 2, Core Strategy



**Figure 2:** Extract of Map 2.4 Limerick Shannon Metropolitan Area (in Limerick) Core Strategy Map, Chapter 2, Core Strategy

In accordance with the Economic and Social Research Institute’s (ESRI) ‘Regional Demographics and Structural Housing Demand at a County Level’, the Core Strategy as set out in the table below, outlines a forecast for an additional 15,591 no. residential units in Limerick City and County over the Plan period 2022 – 2028.

In order to cater for this forecasted household growth in accordance with the principles of proper planning and sustainable development, the Core Strategy allocates approximately 835.97ha. of lands for residential development, including mixed use zones which allow for residential development, across the 24 zoned settlements of the hierarchy. Such settlements include Limerick City and Suburbs, the Key Town of Newcastle West, Level 3 Towns and Level 4 Large Villages. These zoned lands alone will cater for an additional 14,415 no. units to 2028.

Further to the settlements with objectives for the zoning of land, the Core Strategy also allocates a forecast of an additional 1,176 no. dwelling units across the Level 5 Small Villages, Level 6 Rural Clusters and Level 7 Open Countryside. With respect to the Open Countryside, the Core Strategy forecasts an additional 772 no. dwellings over the lifetime of the Plan.

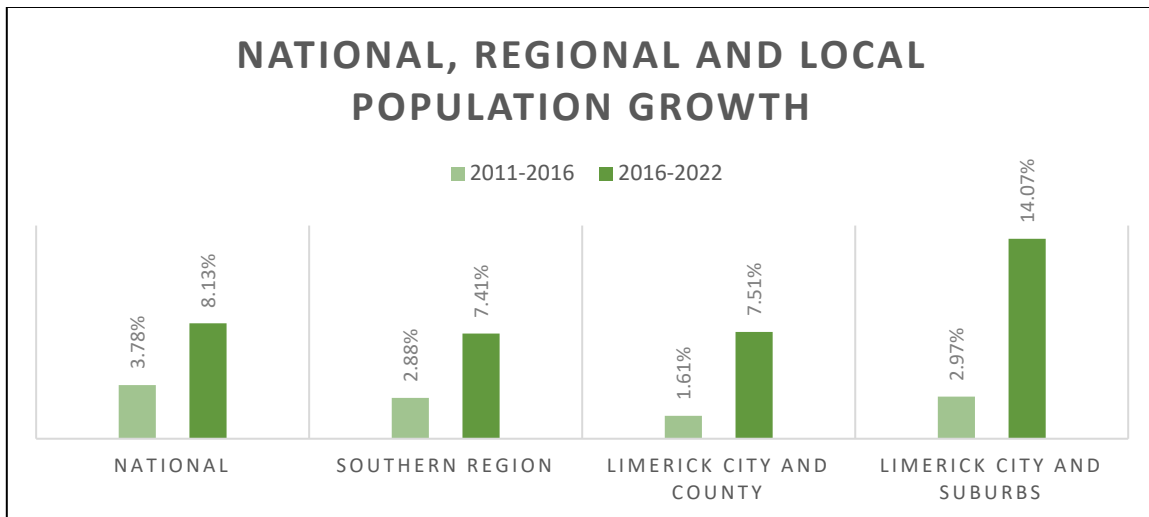
Level	Settlements	Census 2016 population	Population totals 2028	Population growth as % of 2016 base <sup>a</sup>	Additional house-holds forecasted 2022-28	Target residential density ranges (UPH) <sup>a</sup>	Zoned land Required (hectares)	Existing zoned land available (hectares)	Infill or brownfield as % of total zoned lands <sup>a</sup>	Shortfall (-) or excess (+) of zoned land (hectares)
Limerick Shannon Metropolitan Area (in Limerick)	Limerick City and Suburbs (in Limerick)	89,671	123,242		11,054	35 to 100+	259.25	353.06	84%	93.81
	Annacotty	2,930	3,641		235	45+	5.22	8.38	80%	3.16
	Mungret	277	687		153	35+	4.37	4.38	100%	0.01
	City and Suburbs (in Limerick), Mungret and Annacotty	92,878	127,570	37%	11,442		268.84	365.82	84%	96.98ha. (Capacity for 12,750 units on zoned lands)
	Castleconnell	2,107	2,697	28%	205	10 or 22+	11.59	24.89		13.30
	Patrickswell	847	1,153	36%	95	10 or 22+	5.36	37.93		32.57
	Clarina	294	591	101% <sup>a</sup>	20					
	Montpelier	150	172	15%	7					
	Rural Metro Area	8,676	9,237	6%	104					
	Remainder of Metro Area	12,074	13,850	16%	431		16.95	62.82		45.87
	Limerick Shannon Metropolitan Area (in Limerick)	104,952	141,420	35%	11,873		285.78	440.57		154.78
Key town	Newcastle West	6,619	8,607	30%	706	10 or 35+	30.26	139.02		108.76
Level 3 Towns	Abbeyfeale	2,023	2,589	28%	211	10 or 22+	11.89	45.50		33.61
	Kilmallock	1,668	2,135	28%	162	10 or 22+	9.14	19.61		10.47
	Rathkeale	1,441	1,844	28%	147	10 or 22+	8.30	38.12		29.82
	Caherconlish	1,476	1,815	23%	125	10 or 22+	7.02	9.94		2.92
	Level 3 Aggregate	6,608	8,383	27%	645		36.35	113.17		76.82
Level 4 Large Villages	Adare	1,129	1,455	29%	122	10 or 22+	6.88	58.35		51.48
	Askeaton	1,137	1,455	28%	119	10 or 22+	6.72	23.54		16.82
	Ballingarry	521	667	28%	55	10 or 22+	3.08	5.89	29.71%	2.81
	Bruff	803	1,043	30%	83	10 or 22+	4.68	5.52	12.30%	0.84
	Bruree	580	740	28%	39	10 or 22+	2.21	2.13	65.49%	See Footnote <sup>a</sup>
	Cappamore	620	794	28%	65	10 or 22+	3.66	3.32	17.62%	See Footnote <sup>a</sup>
	Croom	1,159	1,484	28%	104	10 or 22+	5.84	12.45		6.61
	Doon	516	660	28%	52	10 or 22+	2.91	2.73	100.00%	See Footnote <sup>a</sup>
	Dromcolliher	518	663	28%	54	10 or 22+	3.06	2.43	65.06%	See Footnote <sup>a</sup>
	Foynes	520	666	28%	55	10 or 22+	3.07	3.49	0.00%	0.42
	Glin	576	737	28%	59	10 or 22+	3.33	3.10	38.71%	See Footnote <sup>a</sup>
	Hospital	653	836	28%	64	10 or 22+	3.59	3.32	100.00%	See Footnote <sup>a</sup>
	Kilfinane	789	1,010	28%	81	10 or 22+	4.59	3.81	100.00%	See Footnote <sup>a</sup>
	Murroe	1,377	1,694	23%	117	10 or 22+	6.61	5.82	66.79%	See Footnote <sup>a</sup>
	Pallasgreen	568	727	28%	60	10 or 22+	3.38	3.11	50.32%	See Footnote <sup>a</sup>
Pallaskerry	651	836	28%	63	10 or 22+	3.53	3.60	86.28%	0.07	
Level 4 Aggregate	12,117	15,467	28%	1,191		67.15	142.61		75.46	
Level 5	Small Villages	5,469	6,453	18%	313					
Level 6	Rural Clusters	1,882	1,855	15%	91					
Level 7	Open Countryside	57,252	61,936	8%	772					
City and County	Totals	194,899	244,121	25%	15,591		419.54	835.97		416.42

Table 1: Extract of Table 2.7, Core Strategy Table, Chapter 2, Core Strategy

### 3. Population Trends

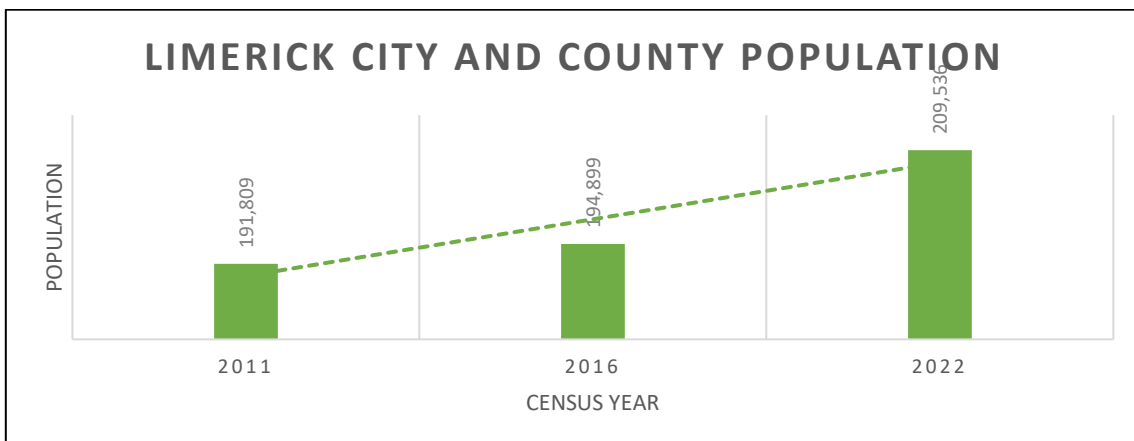
Since the adoption of the Plan, the Central Statistics Office (CSO) has released the results of the Census of Population which was carried out in 2022. This section provides a brief overview of the population trends nationally and regionally, followed by a short analysis of the performance of Limerick County, City and settlements designated in the hierarchy in terms of population growth.

Ireland’s population was recorded as 5,149,139 in the 2022 Census. As set out in Table 2 below, the Census data indicates that Ireland experienced steady population growth between 2011 and 2016, with an actual growth of 173,613 and a percentage increase of 3.78%, followed by a surge in growth of 387,274 or 8.13% in the 2016 to 2022 intercensal period. The Southern Region’s population was 1,703,393 in the 2022 Census, having experienced growth of 117,487 or 7.41% since 2016.



**Table 2:** National, Regional and Local Population Growth Trends, CSO 2022

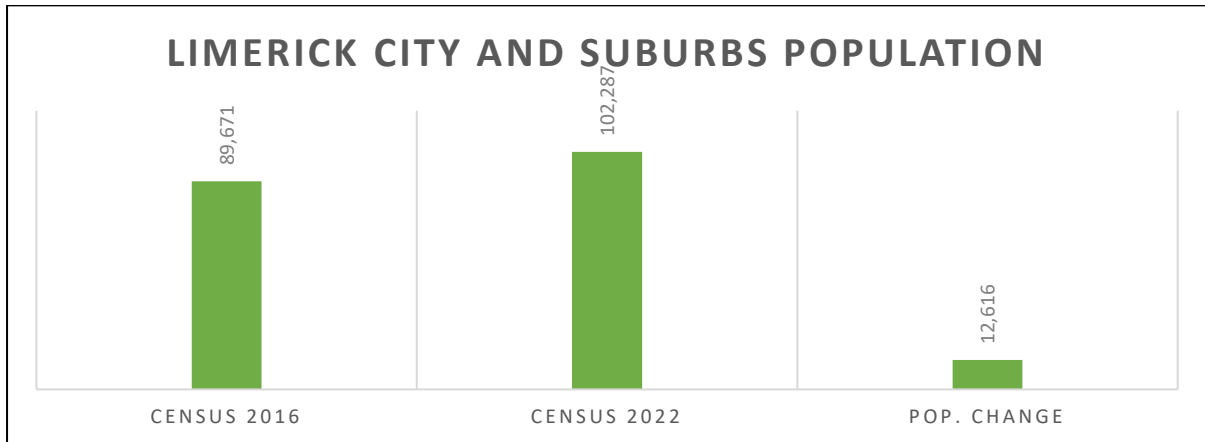
As set out in Table 2 above and Table 3 below, Limerick City and County experienced population growth throughout both intercensal periods. Between 2011 and 2016, the population grew by 3,090 or 1.6%, followed by a surge in growth of 14,637 or 7.5% between 2016 and 2022, when the population reached 209,536.



**Table 3:** Limerick City and County Population, CSO 2022

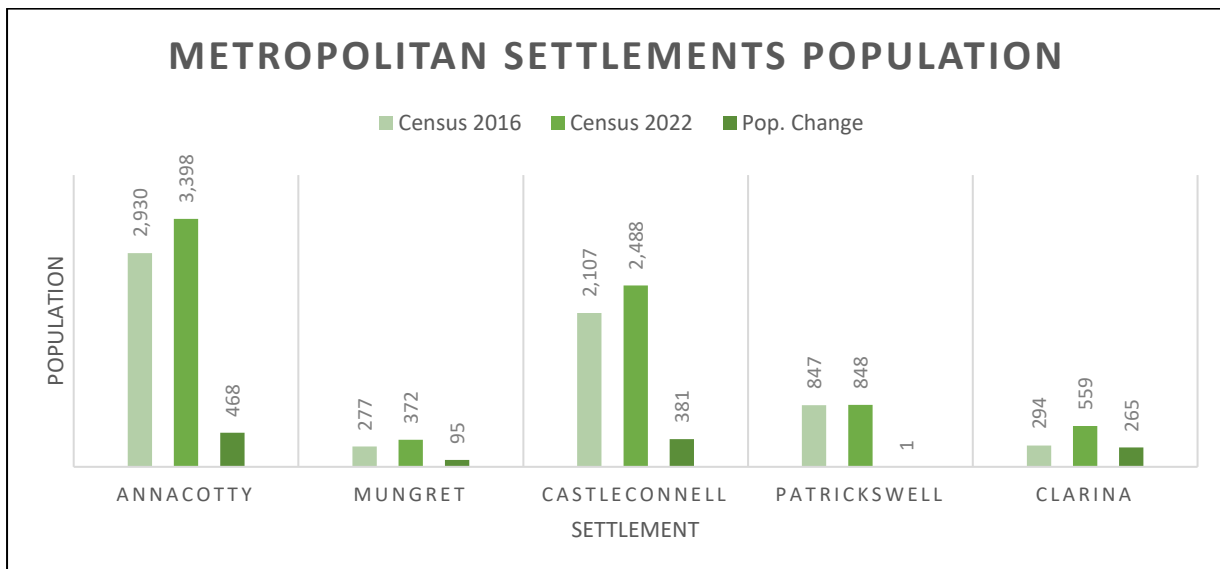


The majority of this growth was concentrated in Limerick City and Suburbs, where population growth was 2,590 or 2.97% between 2011 and 2016, followed by exceptional growth of 12,616 or 14.07% between 2016 and 2022 as indicated in Table 4 below. The City and Suburbs recorded a total population of 102,287 in 2022. In accordance with the Core Strategy forecast, the population of Limerick will grow to 244,121 by 2028, with a forecasted population of 123,242 in the City and Suburbs.



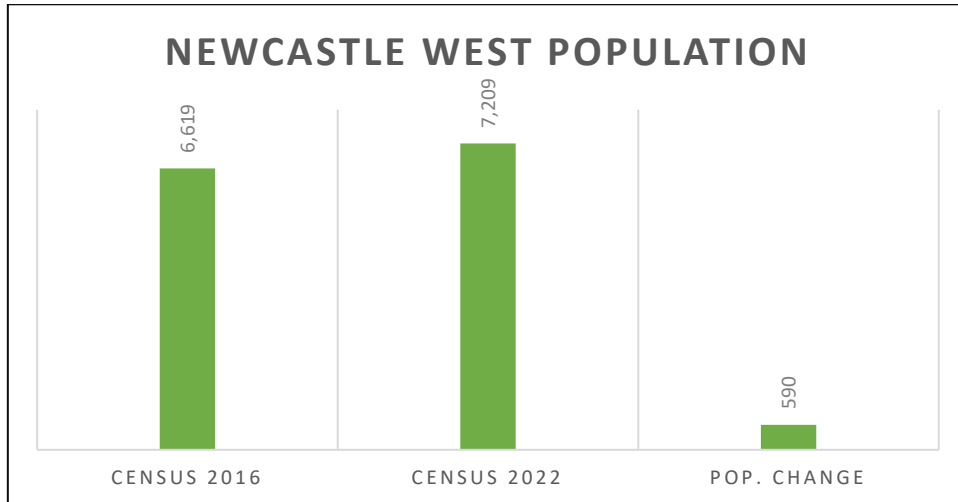
**Table 4:** Limerick City and Suburbs Population, CSO 2022

The notable increase in growth experienced in Limerick City and Suburbs during the 2016 to 2022 intercensal period, aligns with the strategic approach of the Local Authority to encourage urban living, through the provision of zoned and serviced land, with investment in regeneration and infrastructure to facilitate consolidation and compact growth of the settlement. The growth of the City and Suburbs demonstrates the desirability of the City and Suburbs as a place to live and work, with a range of third level institutes and strengths in various employment sectors. As per Table 5 below, the Metropolitan settlements have also generally experienced population growth. The pattern of population growth in the Metropolitan area accords with the objectives of the National Planning Framework (NPF), the Regional and Spatial Economic Strategy for the Southern Region (RSES) and is in line with the Core Strategy of the Limerick Development Plan 2022 – 2028.



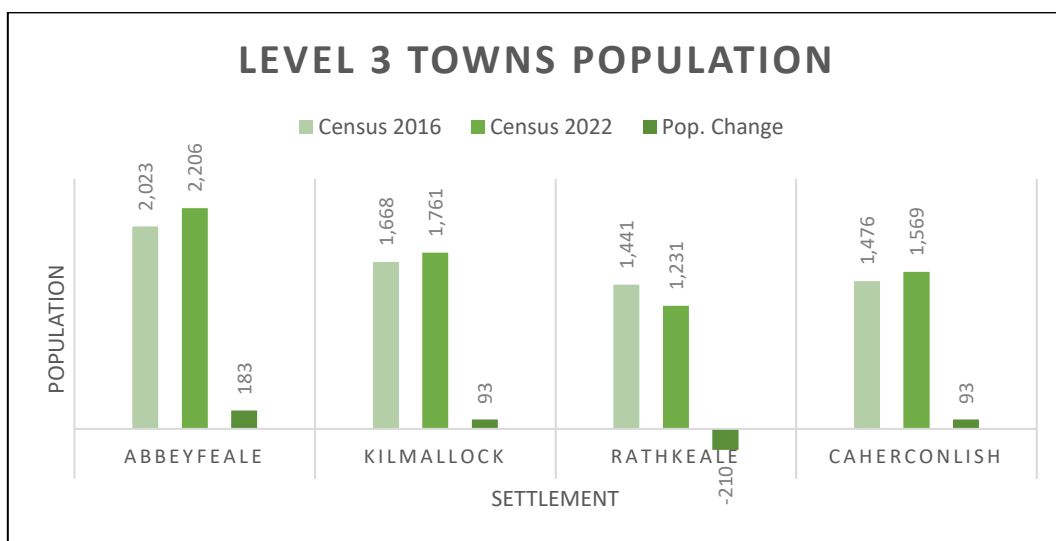
**Table 5:** Metropolitan Settlements Population, CSO 2022

Outside of the Metropolitan Area, notable growth is evident in the Key Town of Newcastle West. As set out in Table 6 below, the settlement experienced substantial growth of 8.9% between 2016 and 2022 to reach a population of 7,209. As per the Core Strategy, the Key Town is forecast to continue to grow to 8,607 persons by 2028. Such projected growth is in accordance with the objectives as set out in the RSES for a designated Key Town.



**Table 6:** Newcastle West Population, CSO 2022

As set out in Table 7 below, the Level 3 Towns of Abbeyfeale, Kilmallock and Caherconlish, have also shown consistent population growth, with Abbeyfeale increasing by 9% to 2,206, Kilmallock increasing 5.6% to 1,761 and Caherconlish increasing 6.3% to 1,569. On the other hand, the Level 3 Town of Rathkeale has experienced a decline in population of 14.6% (210) to 1,231 over the last intercensal period. However, it is noted that a recovery in the population to 1,844 by 2028 is forecast in Rathkeale as set out in the Core Strategy. The Core Strategy identifies a forecast for population growth to a total of 8,383 across the combined Level 3 Towns to 2028, indicating positive prospects for the continued development and attractiveness of these settlements for residential and employment growth.

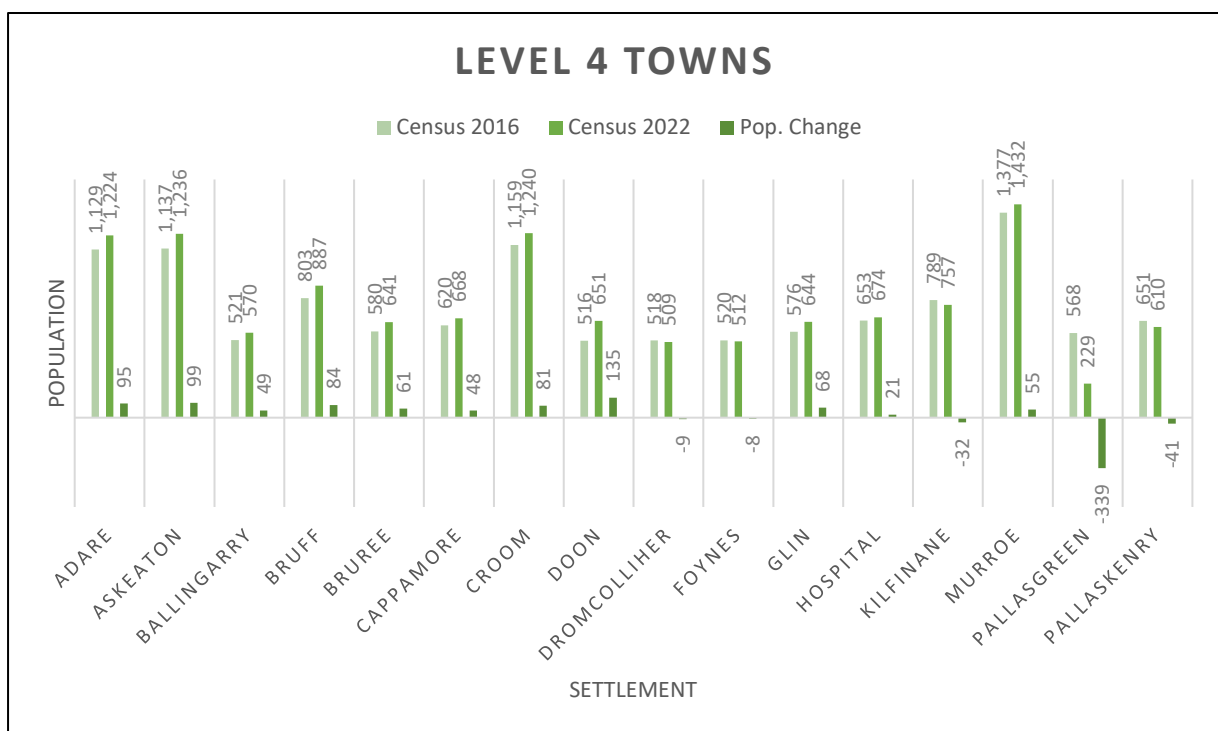


**Table 7:** Level 3 Towns Population, CSO 2022

The 2022 Census data shows varied population trends across the Level 4 Settlements as set out in Table 8 below. Some of the Level 4 settlements demonstrated steady growth and

resilience, while others are facing challenges for recovery. The settlements with consistent and substantial population growth, include Adare (+8.4% to 1,224), Murroe (+4% to 1,432) and Doon (+26.2% to 651), demonstrating their attractiveness and opportunities for continued regeneration and compact growth. In contrast, the settlements of Pallasgreen and Pallaskenry have experienced a decline in population of 59% to 229 and 6% to 610 respectively.

The Planning Authority would like to note that the stark decline in the population figure for Pallasgreen is due to a change in the boundary of the settlement, resulting in the omission of the adjoining village of Nicker.



**Table 8:** Level 4 Towns Population, CSO 2022

Overall, the 2022 Census data demonstrates positive population growth in the designated settlements in the hierarchy. To this effect, the population growth trends demonstrate that the Core Strategy has accurately directed population growth towards the designated settlements across the hierarchy of the Plan. The population trends provide confidence that the annual monitoring report will demonstrate that the objectives of the Core Strategy can be achieved over the lifetime of the Plan.

## 4. Core Strategy Monitoring

Section 10.3.1 Core Strategy Monitoring (Annual) of the 'Development Plan Guidelines' sets out 7 no. indicators for Residential, Commercial and Settlement Consolidation Sites to determine the progress in achieving the Core Strategy of the Plan. The 7 no. indicators are set out in Table 9 below:

Indicator	
<b>Residential</b>	
<b>1</b>	New home completions (including through refurbishment/ conversions)
<b>2</b>	New home completions per NPO 3 - Compact Growth
<b>3</b>	Planning permission granted for residential development with: <ul style="list-style-type: none"> <li>(i) A breakdown of 1, 2, 3 and 4+ bedroom units permitted and</li> <li>(ii) A breakdown per Tier 1 and Tier 2 lands</li> </ul>
<b>4</b>	Breakdown by relevant rural area type of housing: <ul style="list-style-type: none"> <li>(i) Planning Applications lodged</li> <li>(ii) Breakdown in decisions</li> <li>(iii) New home completions</li> </ul>
<b>Commercial</b>	
<b>5</b>	Developed and occupied commercial floor space
<b>6</b>	Planning permissions for business/ employment uses (m2) for: <ul style="list-style-type: none"> <li>(i) Office</li> <li>(ii) Industrial</li> <li>(iii) Retail</li> <li>(iv) Warehousing/ Logistics</li> </ul>
<b>Settlement Consolidation Sites</b>	
<b>7</b>	Specific reporting on the progress of the Settlement Consolidation Sites identified in the Development Plan. This should include information on enabling infrastructure services delivery, planning permissions granted, housing constructed, funding applications made, project timelines, Vacant Site Levy commentary etc.

**Table 9:** Annual Report Monitoring Indicators, Development Plan Guidelines

The following sections include tables and brief commentary with respect to the various indicators for the first year of the Limerick Development Plan 2022-2028 being in place. In addition, the report also outlines the pipeline residential developments comprising extant grants of planning permission, including those that have commenced or not yet commenced and which are located in Limerick City and Suburbs. The report also considers in brief the obstacles to dwelling delivery evident in the current economic climate.

### 4.1 Residential Indicators 1 and 2 - Dwelling Completions

This section provides an overview of the number of dwellings required and completed in Limerick during the first year since the adoption of the Limerick Development Plan 2022 – 2028. As set out in Section 2 of this report, in accordance with the ESRI’s ‘Regional Demographics and Structural Housing Demand at a County Level’, the Core Strategy table identifies a forecast of 15,591 no. additional households between 2022 and 2028 in Limerick City and County. This equates to an average requirement for 2,598 no. additional dwellings per annum, or 649 no. additional dwellings per quarter to 2028.

Having regard to the information available on the Department of Housing, Local Government and Heritage’s Housing Delivery Tracker and the CSO’s New Dwelling Completions Q2 2023 Report, the following table sets out the average no. of units required by quarter and the residential completions by unit type across Limerick City and County since the adoption of the Limerick Development Plan:

Quarter/Year	Average No. of Units Required	No. of Apartments Built	No. of Scheme Houses Built (In estates)	No. of Single Houses Built	Total No. of units Built
Q3 2022	649	5	130	61	196
Q4 2022	649	3	148	61	212
Q1 2023	649	60	109	36	205
Q2 2023	649	2	90	61	153
<b>Total</b>	<b>2,598</b>	<b>70</b>	<b>477</b>	<b>219</b>	<b>766</b>

Table 10: Housing Completions, Housing Delivery Tracker

The number of dwellings completed (766 no. units) compared to the average number of dwellings required per annum (2,598 no. units) over the lifetime of the Plan, indicates a shortfall of 1,832 no. units for the first year since the adoption of the Plan.

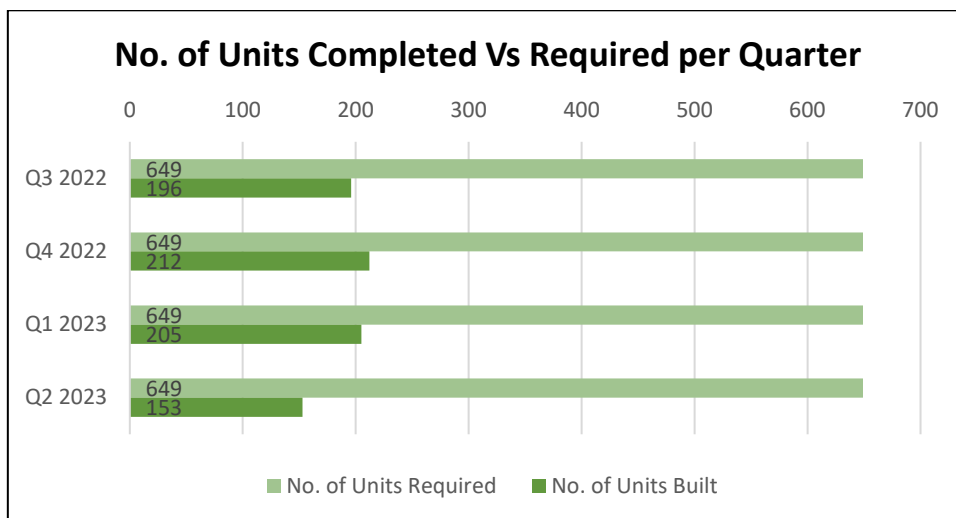


Figure 3: No. of dwellings completed vs no. required per quarter for the first year of the Development Plan

Further to Table 10 above, utilising the Housing Delivery Tracker and GeoDirectory data, a breakdown by settlement of the number of additional households forecast, the average number of units required per annum and the number of units completed across the City and County, including in the surrounding rural area in 2022 is set out in the following table:

Level	Settlement and Surrounding Area	Census Data 2022 - Population	Additional Households Forecasted 2022-2028	Average No. of units required per annum	New home completions including refurb/ conversions (2022)	New home completions as % of no. of units required per annum	% of New home completions contributing to compact growth
<b>Limerick Shannon Metropolitan Area (in Limerick)</b>	Limerick City and Suburbs (in Limerick)	102,287	11,054	1,842	385	21	100
	Annacotty	3,398	235	39	1	2.5	0
	Mungret	372	153	26	0	0	0
	Castleconnell	2,488	205	34	2	6	100
	Patrickswell	848	95	16	1	6	100
	Clarina	559	20	3	0	0	0
	Montpelier	451	7	1	1	14	0
<b>Key Town</b>	Newcastle West	7,209	706	118	39	33	66
<b>Level 3 Towns</b>	Abbeyfeale	2,206	211	35	2	6	0
	Kilmallock	1,761	162	27	27	100	100
	Rathkeale	1,231	147	25	10	40	0
	Caherconlish	1,569	125	21	3	14	66
<b>Level 4 Large Villages</b>	Adare	1,224	122	20	0	0	0
	Askeaton	1,236	119	20	0	0	0
	Ballingarry	570	55	9	1	11	100
	Bruff	887	83	14	2	14	100
	Bruree	641	39	7	0	0	0
	Cappamore	668	65	11	0	0	0
	Croom	1,240	104	17	4	23.5	0
	Doon	651	52	9	0	0	0
	Dromcolliher	509	54	9	0	0	0
	Foynes	512	55	9	0	0	0
	Glin	644	59	10	1	10	0
	Hospital	674	64	11	0	0	0
	Kilfinane	757	81	14	1	7	100
	Murroe	1,432	117	20	2	10	100
	Pallasgreen	229	60	10	3	30	0
Pallaskenry	610	63	11	0	0	0	
<b>Level 5</b>	Small Villages	5,404	313	52	13	25	0

**Table 11:** Residential Forecast, unit requirements and completions by settlement, Housing Delivery Tracker

With the exception of the Level 3 Town of Kilmallock, the number of new dwelling completions is significantly below the average annual target across all settlement levels. Dwelling completions are not in line with the annual growth targets set out in the Core Strategy, which are required to serve the projected population growth to 2028. With respect to Limerick City and suburbs, where the greatest target of growth is envisaged, only 21% of the annual target (1,842 no. units) of dwellings required per annum was completed (385 no. units) in 2022.

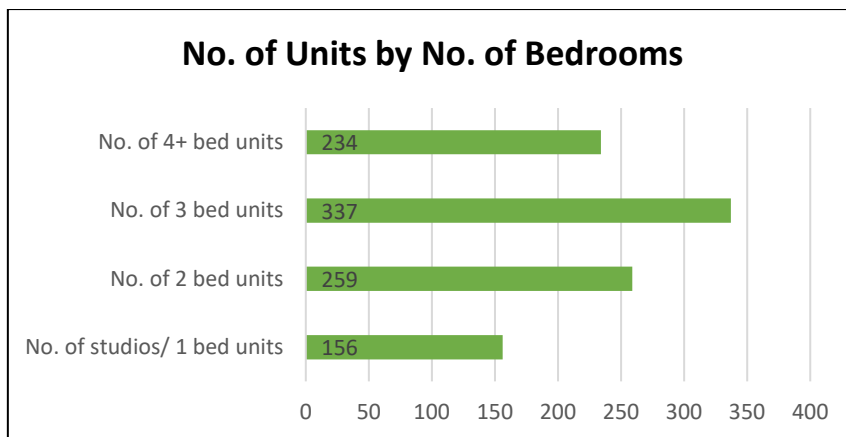
#### 4.2 Residential Indicator 3 - Residential Planning Permissions - Settlements

This section provides an overview of the 66 no. planning permissions granted for residential developments, comprising 986 no. units in the various designated settlements across Limerick City and County during the first year of the Development Plan 2022 – 2028. This section also sets out a brief outline of the availability of zoned land to cater for residential development over the lifetime of the Plan. Section 4.4 further below provides an overview of planning permissions granted in rural areas for one off dwellings.

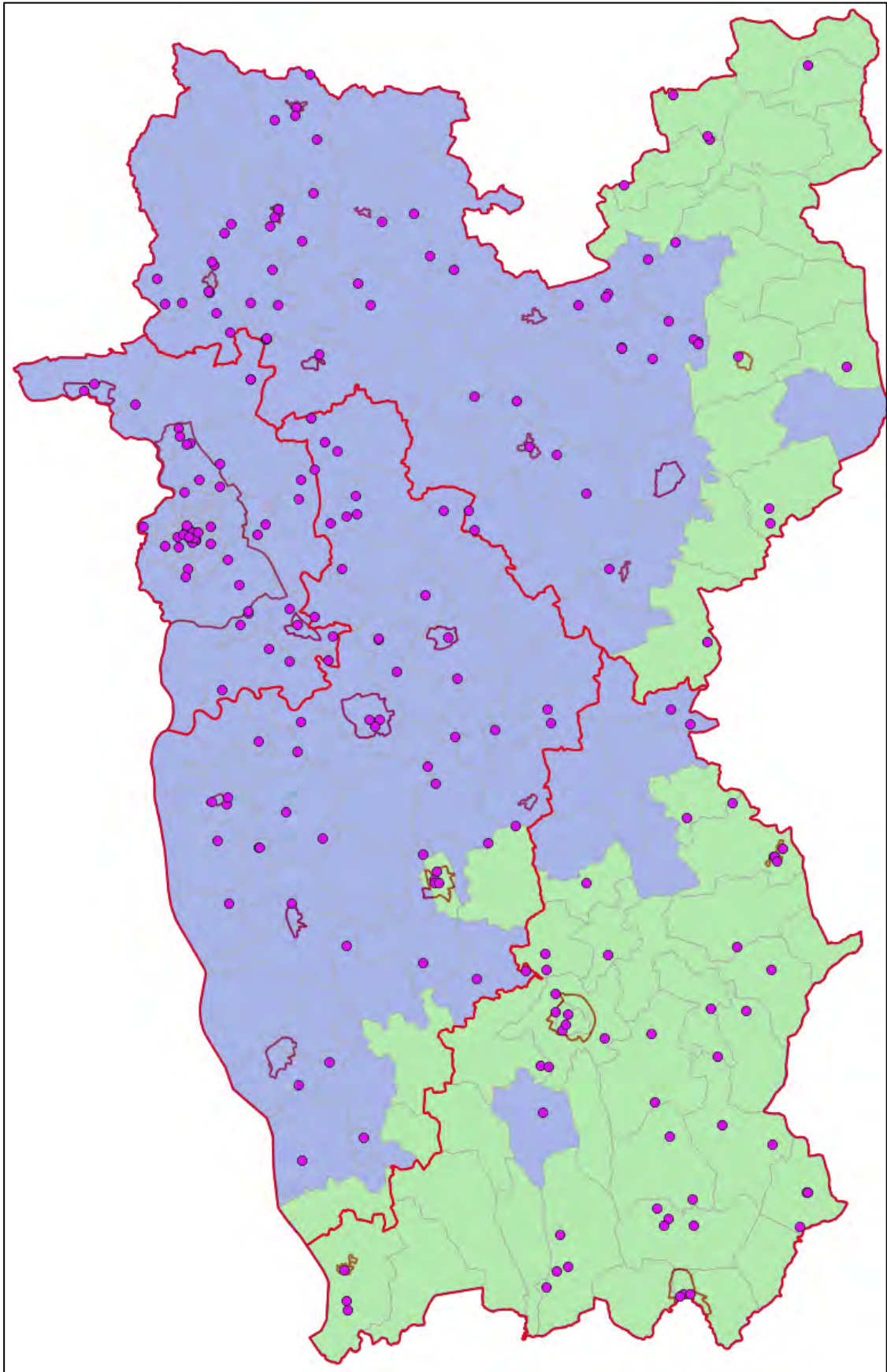
The spatial distribution of the residential planning permissions granted are set out in Figure 4 below. Table 13 further below provides a breakdown of the number of residential planning permissions granted, the percentage of total applications that contribute to compact growth, the type and number of units and the number of units by bedrooms permitted for the settlements across Limerick for the first year of the Plan to 1<sup>st</sup> August 2023.

As set out in Table 13 below, across the zoned settlements in the hierarchy, 66 no. residential planning permissions have been granted, comprising 986 no. units during the first year of the Development Plan. The majority of permissions granted (33 no.) are located within Limerick City and Suburbs and comprise 696 no. residential units (496 no. apartments and 200 no. houses). Planning permission has been granted for 103 no. units in Adare, followed by 91 no. units in Newcastle West. The majority of the units granted permission comprise three bedroom units (337 no.) across all settlements.

Student accommodation comprising 644 no. bed spaces in 247 no. units have been granted permission in Limerick City and Suburbs during the first year of the Plan.



**Table 12:** No. of Units by No. of Bedrooms Granted Permission during the First Year of the Development Plan



**Figure 4:** Spatial Distribution of Grants of Planning Permission for Residential Units in Limerick City and County during the First Year of the Development Plan



Level	Settlements	Total No. of Planning Permissions Granted	% of Total applications contributing to Compact Growth	Total No. of Units granted	No. of Apartments granted	No. of Houses granted	No. of Student bedspaces granted	No. of studios/ 1 bed units	No. of 2 bed units	No. of 3 bed units	No. of 4+ bed units	No. of units granted on Tier 1 lands	No. of units granted on Tier 2 lands
<b>Limerick Shannon Metropolitan Area (in Limerick)</b>	Limerick City and Suburbs (in Limerick)	33	97	696	496	200	962	130	198	189	179	298	0
	Annacotty	1	100	1	-	1	-	-	-	-	1	0	0
	Mungret	-	-	-	-	-	-	-	-	-	-	-	-
	Castleconnell	2	100	2	-	2	-	-	-	1	1	0	0
	Patrickswell	1	100	24	-	24	-	-	8	11	5	N/A <sup>1</sup>	N/A <sup>1</sup>
	Clarina	-	-	-	-	-	-	-	-	-	-	N/A <sup>1</sup>	N/A <sup>1</sup>
	Montpelier	-	-	-	-	-	-	-	-	-	-	N/A <sup>1</sup>	N/A <sup>1</sup>
<b>Key Town</b>	Newcastle West	4	100	91	13	78	-	13	14	57	7	N/A <sup>1</sup>	N/A <sup>1</sup>
<b>Level 3 Towns</b>	Abbeyfeale	3	100	5	2	3	-	-	2	3	-	N/A <sup>1</sup>	N/A <sup>1</sup>
	Kilmallock	-	-	-	-	-	-	-	-	-	-	N/A <sup>1</sup>	N/A <sup>1</sup>
	Rathkeale	4	100	5	-	6	-	-	-	6	-	0	0
	Caherconlish	-	-	-	-	-	-	-	-	-	-	-	-
<b>Level 4 Large Villages</b>	Adare	4	75	103	20	83	-	4	17	49	33	N/A <sup>1</sup>	N/A <sup>1</sup>
	Askeaton	-	-	-	-	-	-	-	-	-	-	-	-
	Ballingarry	-	-	-	-	-	-	-	-	-	-	-	-
	Bruff	1	100	1	-	1	-	-	-	1	-	0	0
	Bruree	-	-	-	-	-	-	-	-	-	-	-	-
	Cappamore	3	100	19	-	19	-	-	5	12	2	17	0
	Croom	1	100	3	-	3	-	-	-	3	-	N/A <sup>1</sup>	N/A <sup>1</sup>
	Doon	1	100	23	23	-	-	10	13	-	-	0	0
	Dromcolliher	2	100	3	2	1	-	-	2	-	1	0	0
	Foynes	-	-	-	-	-	-	-	-	-	-	-	-
	Glin	2	100	4	-	4	-	-	-	4	-	0	0
	Hospital	-	-	-	-	-	-	-	-	-	-	-	-
	Kilfinane	1	100	1	-	1	-	-	-	1	-	-	-
	Murroe	-	-	-	-	-	-	-	-	-	-	-	-
	Pallasgreen	-	-	-	-	-	-	-	-	-	-	-	-
Pallaskenry	1	100	1	-	1	-	-	-	-	1	0	0	
<b>Level 5</b>	Small Villages	2	100	4	-	4	-	-	-	-	4	N/A <sup>1</sup>	N/A <sup>1</sup>
<b>Total</b>	<b>All settlements</b>	<b>66</b>	<b>-</b>	<b>986</b>	<b>556</b>	<b>431</b>	<b>644</b>	<b>156</b>	<b>259</b>	<b>337</b>	<b>234</b>	<b>217</b>	<b>0</b>

Table 13: Settlements – Residential Indicators - Planning Permissions Granted

<sup>1</sup> N/A – Settlements where lands have not been designated Tier 1 or Tier 2, pending review of LAP or where no zoning is in place



Of the 66 no. residential permissions granted during the first year of the Development Plan, commencement notices have been received for only 4 no. developments comprising 6 no. units. With respect to the units commenced, 5 no. are located within the City and Suburbs (in Limerick).

With respect to the availability of land to cater for population growth, it is noted that there have been no variations to the zoning of land incorporated into the Plan, comprising Limerick City and Suburbs, Annacotty, Mungret and the Level 4 Large Villages. The Settlement Capacity Audit for Limerick City and Suburbs, as set out under Volume 2a of the Plan, identified 160 no. sites comprising 365.82ha. of land zoned for residential, or a mixture of uses that include residential development. These sites have been identified as Tier 1 serviced or Tier 2 serviceable. Where such sites have been subject to a grant of planning permission this has been indicated in the table below.

Following a review of the 160 no. Settlement Capacity Audit sites, it is noted that approximately 1,274 no. residential units have commenced construction, or have been constructed on 15 no. sites, or approximately 36ha. of the lands, since the sites were first identified during the Plan making process.

The remaining capacity for residential development on lands identified in the Settlement Capacity Audit for the City and Suburbs equates to approximately 11,449 no. dwellings on 329ha. Therefore, the quantum of lands zoned for residential development that remains without planning permission is sufficient to cater for the forecasted housing requirements to 2028.

With respect to the settlements, the Plan operates in conjunction with a number of Local Area Plans. Following the adoption of the Plan, the Local Area Plans for Caherconlish, Castleconnell, Rathkeale and Abbeyfeale have been reviewed and new Local Area Plans are now in effect. The review process for the Local Area Plans of Adare, Newcastle West and Patrickswell are currently at various stages of the adoption process. The review process for the Askeaton, Croom and Kilmallock Local Area Plans is yet to commence.

The quantum of zoned land in the reviewed Local Area Plans is set out in the table below and accords or exceeds the requirements for land identified in the Core Strategy:

Local Area Plan	Plan Stage	Local Area Plan Land Zoned New Residential and Serviced Sites (ha.)
Abbeyfeale	Adopted	10.97
Adare	Draft	16.38
Caherconlish	Adopted	8.615
Castleconnell	Adopted	15
Newcastle West	Material Alterations	59.63
Patrickswell	Draft	13.926
Rathkeale	Adopted	9.26

**Table 14:** Quantum of New Residential and Serviced Sites in the Local Area Plans adopted or under review

### 4.3 Residential Pipeline Development – Limerick City and Suburbs

This section outlines the pipeline residential developments located in Limerick City and Suburbs. The pipeline developments where granted planning permission and developed, will contribute to the number of dwelling completions and the achievement of the objectives of the Core Strategy over the lifetime of the Plan.

Further to the planning permissions granted in the settlements during the first year of the Development Plan, it is noted that as of July 2023 in Limerick City and Suburbs, there were 1,984 no. units granted planning permission but not commenced and a further 1,784 no. units with planning permission granted and construction commenced. In addition, decisions were pending on planning applications for a further 1,408 no. units.

Table 15 below sets out a breakdown of the pipeline applications by area, while Figure 5 further below indicates the spatial distribution of pipeline residential developments in the City and Suburbs.

Status	City Centre	Northside	North and East Inner Suburbs	Castletroy	Former City and Rosbrien	Southern Environs	Total No. of Units
No. of Units Pending Decision	162	233	93	95	145	680	<b>1,408</b>
No. of Units Granted Permission – Not Commenced	177	366	33	358	488	562	<b>1,984</b>
No. of Units Granted and Commenced	128	432	78	818	141	187	<b>1,784</b>

**Table 15:** Residential Pipeline Development – Limerick City and Suburbs

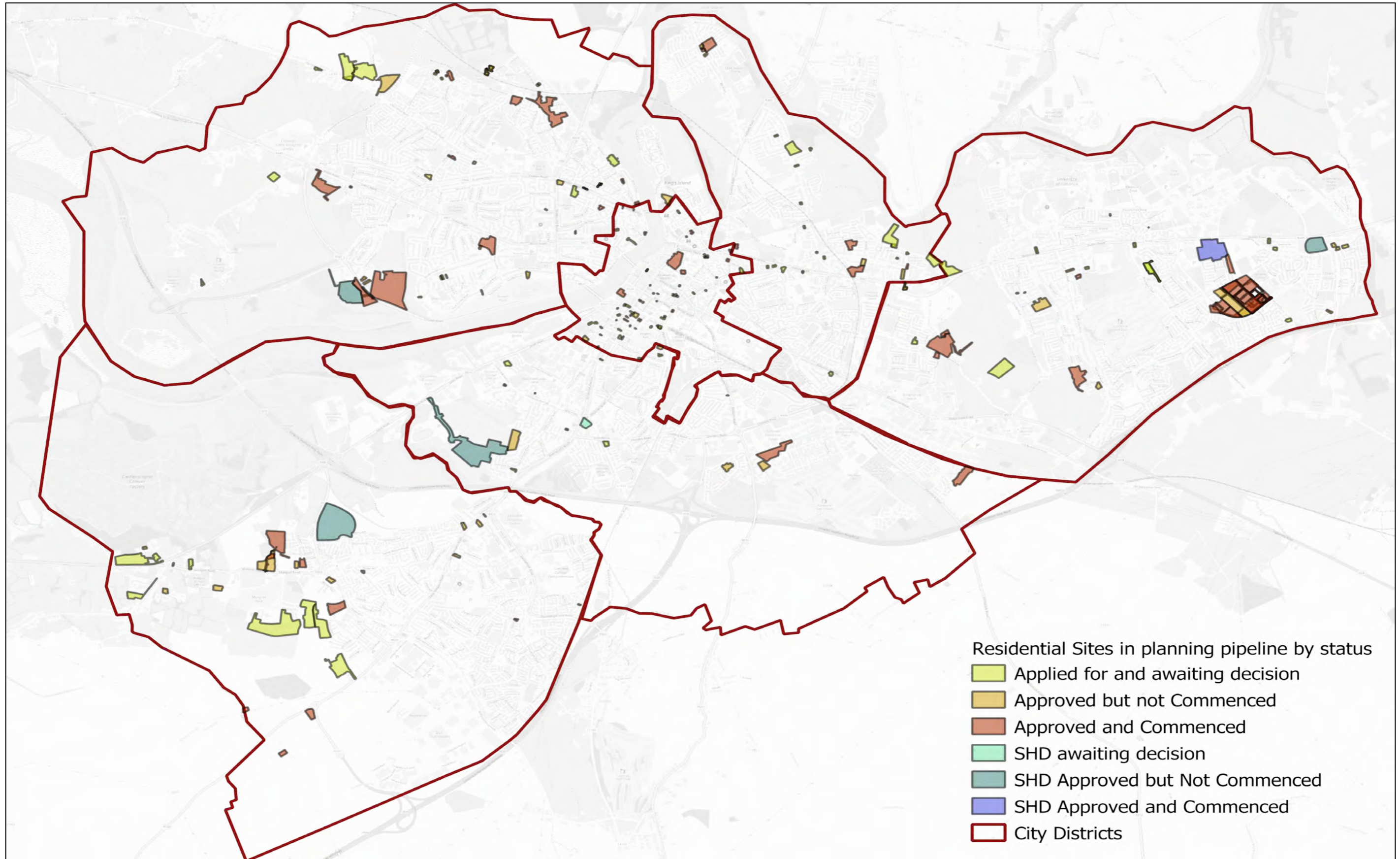


Figure 5: Spatial Distribution of Residential Pipeline Sites – Limerick City and Suburbs



#### 4.4 Residential Indicator 4 - Residential Planning Applications – Rural

This section outlines the pattern and status of planning applications for single dwellings located in the rural areas of Limerick during the first year of the Plan.

Table 16 below outlines the indicators for residential development in the rural housing strategy areas, comprising Category 1 – Areas under Strong Urban Influence and Category 2 – Rural Areas Elsewhere. The table outlines a breakdown of the planning applications in the two rural housing strategy areas and decision types for the first year of the Plan to 1<sup>st</sup> of August 2023. The rural housing strategy areas are identified in Figure 6 further below.

Level	Settlements	Rural Housing Category	Planning Applications lodged	Permissions Granted	Applications Refused/ Withdrawn
Limerick Shannon Metropolitan Area (in Limerick)	Rural Metro Area	Areas under Strong Urban Influence	30	17	5
Level 7	Open Countryside	Areas under Strong Urban Influence	164	97	30
		Rural Areas Elsewhere	71	49	8
<b>Total</b>	Countryside		<b>265</b>	<b>163</b>	<b>43</b>

**Table 16:** Rural Areas - Residential Indicators – Breakdown of Planning Applications

The Core Strategy allocated 772 no. additional dwellings in the open countryside to 2028. This allocation equates to an average of 128 no. dwellings per annum. For the first year of the Plan being in place, 163 no. rural one off dwellings have been granted planning permission, exceeding the average annual target by 35 no. dwellings. At time of writing, a further 59 no. planning applications for rural one off dwellings, submitted during the first year of the Plan were undecided.

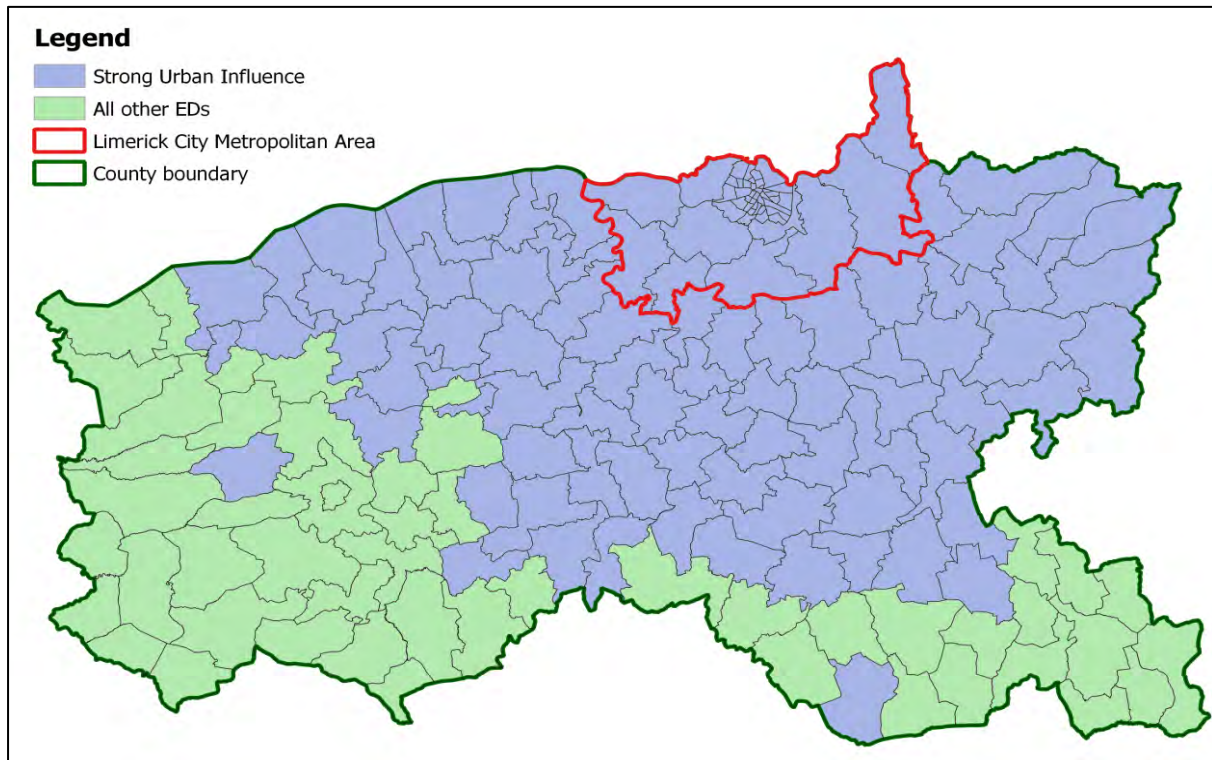
Having regard to the Department’s Housing Tracker and GeoDirectory data for 2022, it is estimated that approximately 219 no. units have been completed in the rural area outside of any designated settlement.

No. of Commencement Notices	Rural Housing Category
6	Rural Area Elsewhere
22	Strong Urban Influence

**Table 17:** Commencement Notices by Rural Housing Category

With respect to the rural one off dwellings granted permission during the first year of the Plan, as indicated in the table above, commencement notices have been received for 28 no.

units, consisting of 6 no. units in the area designated Rural Area Elsewhere and 22 no. units in the area designated Strong Urban Influence.



**Figure 6:** Extract of Map 4.1: Rural Housing Strategy Map, Chapter 4 Housing

#### 4.5 Obstacles to Dwelling Delivery

As set out under Sections 4.2 Residential Indicator 3 - Residential Planning Permissions – Settlements and 4.4 Residential Indicator 4 - Residential Planning Applications – Rural above, since the adoption of the Plan a total of 1,149 no. residential units have been granted planning permission across the City and County.

The substantial majority of land zoned, particularly in Limerick City and Suburbs is serviced or serviceable by infrastructure necessary to allow the immediate commencement of development, following the granting of planning permission by the Planning Authority or An Bord Pleanála on appeal. However, obstacles to the commencement of development on the planning side include delays of decision making by An Bord Pleanála and the lengthy Judicial Review procedure.

Following the receipt of planning permission, it appears that factors relating to inflation and the associated increased costs of financing, energy, transport, materials, construction to current Building Regulation standards and a lack of labour are contributing to delayed commencements and slow delivery. Construction costs mainly consist of direct materials and labour and account for approximately 50% of total development costs. The remaining 50% comprise soft costs of, for example, site acquisition, professional fees, financing, margins, VAT, marketing etc. (DoHLGH (2023) 'Residential Construction Cost Study').



The increased costs associated with development can substantially affect profit margins, making delivery less viable, particularly in relation to apartments. Increased costs have resulted in delays in commencement and a slowdown of some projects, which will inevitably result in delayed delivery. This results in a requirement for further increases in house prices to make developments profitable. These issues are inevitably leading to further issues of affordability on the demand side.

It is hoped that the Government’s Project Tosiagh (LDA project to unlock land with full planning permission), STAR Scheme (Secure Tenancy Affordable Rental Investment Scheme to bring forward Cost Rental dwellings) and Croi Conaithe will enhance viability and assist affordability. In addition, the Development Charges waiver and Water Connection rebate schemes will assist in the reduction of soft costs.

With respect to large-scale housing developments, long lead in times for delivery is also an issue. While the time it takes to fully develop a site varies and is contingent on many different factors, estimated lead in times for the completion of construction are a minimum of 18 to 24 months for houses and potentially twice that for apartments (DoHLGH (2002) ‘Dublin Housing Delivery Group Report No. 2’). This is a particular issue given the extent of pent up demand and lack of supply.

#### 4.6 Commercial Indicators 5 and 6 – Commercial Floor space and Permissions

This section sets out in brief the indicators for commercial development across the settlements in Limerick City and County. The table below sets out the indicators comprising the areas of developed and occupied floor space and the floor space permitted for various specified commercial uses during the first year of the Plan.

Level	Settlement	Developed and Occupied Commercial Floorspace	Permission granted for Offices (m2)	Permission granted for Industrial (m2)	Permission granted for Retail (m2)	Permission granted for Warehousing/ Logistics (m2)
<b>Limerick Shannon Metro. Area (in Limerick)</b>	Limerick City and Suburbs (in Limerick)	-	1,205.58	2,905.23	3,152	9,943.1
	Annacotty	-	-	-	-	-
	Mungret	-	-	-	-	-
	Castleconnell	-	-	-	-	-
	Patrickswell	-	-	-	-	-
	Clarina	-	-	-	-	-
	Montpelier	-	-	-	-	-
<b>Key Town</b>	Newcastle West	-	-	-	908.8	-
	Abbeyfeale	-	-	-	-	-

Level	Settlement	Developed and Occupied Commercial Floorspace	Permission granted for Offices (m2)	Permission granted for Industrial (m2)	Permission granted for Retail (m2)	Permission granted for Warehousing/ Logistics (m2)
<b>Level 3 Towns</b>	Kilmallock	-	-	-	-	-
	Rathkeale	-	-	-	-	-
	Caherconlish	-	-	-	-	-
<b>Level 4 Large Villages</b>	Adare	-	-	-	142.26	-
	Askeaton	-	-	1,228	-	-
	Ballingarry	-	-	-	-	-
	Bruff	-	-	-	-	-
	Bruree	-	-	-	-	-
	Cappamore	-	-	-	-	-
	Croom	-	-	-	-	-
	Doon	-	-	-	-	-
	Dromcolliher	-	-	-	-	-
	Foynes	-	-	-	-	-
	Glin	-	-	-	-	-
	Hospital	-	-	-	-	-
	Kilfinane	-	-	-	38.34	-
	Murroe	-	-	-	-	-
Pallasgreen	-	-	-	-	-	
Pallaskenry	-	-	-	-	-	
<b>Level 5</b>	Small Villages	-	-	-	-	-
<b>Level 6</b>	Rural Clusters	-	-	-	-	-
<b>Total</b>		-	<b>1,205.58</b>	<b>4,133.23</b>	<b>4,241.4</b>	<b>9,943.1</b>

Table 18: Commercial Indicators

The substantial majority of new commercial developments permitted during the first year of the Plan are located within Limerick City and Suburbs. At time of writing, no commencement notices have been submitted for any of the developments permitted.

The attraction of new commercial development to the City and Suburbs is consistent with the objectives of the RSES and Limerick Shannon Metropolitan Area Strategic Plan (MASP). In this regard, the MASP supports Limerick City in becoming a major economic force in the Irish and international economy and a leading centre for commercial investment, capitalising on the City's higher education institutions and skills of the workforce. In addition, the granting of commercial permissions in Newcastle West will facilitate the Key Town's role in underpinning the objectives of the RSES and ensure a spread of economic growth into the County. Commercial investment in the other settlements will also facilitate economic development, employment opportunities and provide services for the local population.

#### 4.7 Settlement Consolidation Sites Indicator 7 – Limerick City and Suburbs

A number of strategic brownfield consolidation sites have been identified for redevelopment in Limerick City Centre, which will have transformative effects on the revitalisation of the City. The Residential Settlement Capacity Audit as set out under Volume 2a Level 1 Limerick City and Suburbs (in Limerick), Mungret and Annacotty of the Plan, identifies these Settlement Consolidation Sites. These sites include Opera Square, Cleeves Riverside Quarter, the University of Limerick Riverside Campus and Colbert Station Quarter. The table below outlines the indicators of progress for development of these sites:

Consolidation Site	Infrastructure Requirements	Services Delivery	Permissions Granted	Dwellings Constructed	Funding Applications	Project Timelines	Vacant Site Levy	Other
<b>Cleeves Riverside Campus</b>	ESB Substation	Project delivery team in place  Design Team appointed to submission of planning permission	None  Non-statutory masterplan completed August 2023  Planning due for submission Q4 2024	None	URDF 2 - €34.5m approved  Preliminary Business Case approved  Drawdown commenced	Submit planning Q4 2024  4-5 year construction period	N/A  RLZT Draft Maps 2023	Design Team appointed to prepare planning application
<b>Opera Square</b>	Under construction	Project delivery team in place  Demolition and Enabling Works	An Bord Pleanála Permission Granted Feb. 2020	None	URDF 1 - €1.8m approved.  Draw down complete	Construction Q4 2020 to Q4 2026	N/A  RLZT Draft Maps 2023	Works progressing on site

Consolidation Site	Infrastructure Requirements	Services Delivery	Permissions Granted	Dwellings Constructed	Funding Applications	Project Timelines	Vacant Site Levy	Other
		<p>Contract (Dec. 2020-Dec. 2022) Complete</p> <p>Basement and One Opera Sq. Contract (Jan. 2023 to Feb. 2025) Ongoing</p> <p>14-storey OPW Building Mar. 2024-Aug. 2026) now at Tender Stage</p> <p>Library, Central Plaza and Four Opera Sq. (Mar. 2024-Dec. 2026)</p>	<p>Amendments Submitted Nov. 2022 – Under review by An Bord Pleanála</p>		<p>Department of Rural and Community Development on 5<sup>th</sup> May 2023. Under Review</p> <p>Libraries Capital Programme 2023 - 2027 submitted on 2<sup>nd</sup> June 2023. Under Review</p>			

Consolidation Site	Infrastructure Requirements	Services Delivery	Permissions Granted	Dwellings Constructed	Funding Applications	Project Timelines	Vacant Site Levy	Other
		now at Tender Stage						
<b>Arthur's Quay</b>	None	In place	None	None	URDF – Part of Worldclass Waterfront funding allocation (€73.4m)	Framework Plan – To be completed by end 2023 to feed into Worldclass Waterfront	N/A	Framework will guide development, reliant on individual landowners thereafter to initiate planning applications
<b>Colbert Station Quarter</b>	None 2023. Going forward some infrastructure may be required to support St. Joseph's and Carey's Road sites	None	None	None	TBC	St. Joseph's Masterplan – to be completed by end 2023  Carey's Road – N/A 2023	N/A	Overall Framework completed

**Table 19:** Settlement Consolidation Site

## 5. Conclusion

This Core Strategy Monitoring Report for 2022 – 2023 outlines progress in the residential and commercial indicators specified under Section 10.3.1 of the Development Plan Guidelines 2022 during the first year of the Development Plan, following its adoption in June 2022.

During the first year of the Plan, approximately 766 no. dwellings were completed across Limerick City and County. The majority of units were completed in Limerick City and Suburbs, followed by the Key Town of Newcastle West, substantially in accordance with the objectives for compact growth (NPO 3) and the Core Strategy. However, the level of completions remains below the average annual and quarterly targets across all settlements. This can be accredited to the current economic climate.

With respect to planning permissions, a total of 1,149 units have been granted permission across the City and County during the first year of the Plan. Across all of the settlements, 986 no. residential units have been granted permission, comprising 556 no. apartments and 431 no. dwelling units. The majority of units granted (337 no.) comprise three bedrooms, followed by two bedrooms units (259 no.). The quantum of lands zoned for residential development that remains without planning permission across all settlements is sufficient to cater for the forecasted housing requirements to 2028.

In relation to rural areas, 163 no. one off dwellings have been granted planning permission during the first year of the Plan, this is in excess of the Core Strategy average target of 128 no. units per annum. The majority of these units (114 no.) were granted in the areas designated Strong Urban Influence, with 17 no. of the permissions located within the Rural Metro Area.

With respect to the Settlement Consolidation Sites in Limerick City, development works are ongoing on the Opera Square site. A number of Framework and Masterplans have been completed, or are nearing completion on the other sites. The commencement of re-development of some of these sites will be in the long term. It is noted that some reliance on third party owners will be required to progress the re-development of two of the sites.

Permissions have been granted for all types of commercial uses in Limerick City and Suburbs, followed by retail development in Newcastle West. Such development will contribute to the economic development of the settlements in accordance with the objectives of the RSES, MASP and Development Plan.

Further to the pattern of population growth in the intercensal period 2016 to 2022, it is evident that the Core Strategy has accurately directed the forecasted growth towards the designated settlements, particularly Limerick City and Suburbs. In conjunction with population growth, the pattern of planning permissions granted for residential development, particularly in the settlements, creates confidence that the annual monitoring report will demonstrate that the objectives of the Core Strategy can be satisfactorily achieved over the lifetime of the Limerick Development Plan 2022 - 2028.