

Forward Planning Update

Q2 2025



October 2025



Comhairle Cathrach
& Contae **Luimníugh**

Limerick City
& County Council

ATLANTIC EDGE
LIMERICK
EUROPEAN EMBRACE

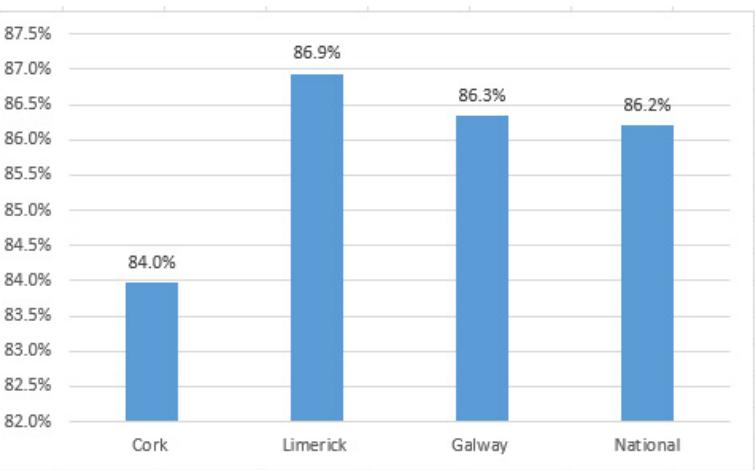
Key Statistics Q2

Table 1: Key Limerick Economic Indicators, Q2 2025

Limerick Economic Indicators	
Total Population	209,536
Area	2,683.04sq.km
Population Density	78.10/km ²
Population under 35 years	44%
Population over 65 years	16%
3rd Level Educational Attainment	41%
Unemployment Rate (Mid West Q2 2025)	4.2%
Disposable Income per Capita (2023)	€29,491 (3rd Highest in Ireland)
Gross Value Added per Capita (Mid West 2023)	€61,238 (3rd Highest in Ireland)
Average House Price (Q2 2025)	Limerick City: €311,086 Limerick County: €297,336
Average Residential Rent (Q2 2025)	Limerick City: €2,422 Limerick County: €1,682
RevPar Average (Q2 2025)	€119
Average Occupancy Rates (Q2 2025)	86.9%

Source: CSO, Daft.ie, Trending

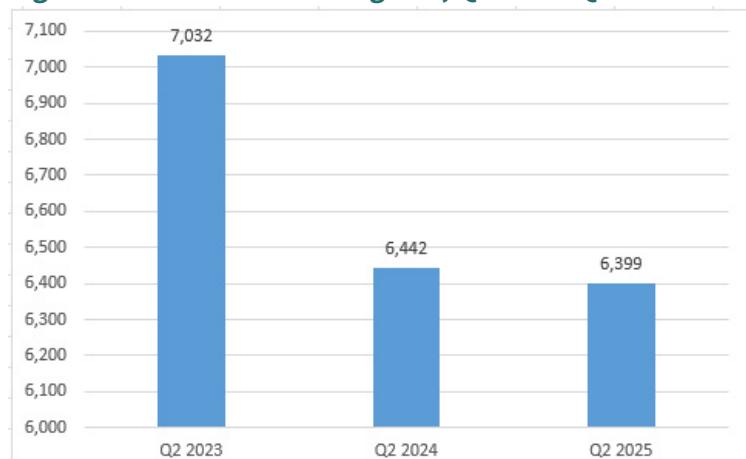
Figure 1: Limerick's Average Hotel Occupancy Rate, Q2 2025



Source: Trending

Note: Data in the quarterly update are presented from Q3 2022 to review the progress since the adoption of the Limerick Development Plan 2022-2028 in Q2 2022 up to and including the relevant quarter.

Figure 2: Limerick's Live Register, Q3 2023 - Q2 2025



Source: CSO

Key Highlights

- The Mid West continued to experience near full employment in Q2 2025, with an unemployment rate of 4.2%, lower than the national average of 4.8%.
- Average house prices in Limerick City were recorded at €311,086 in Q2, an increase of 12.8% on the previous year and higher than the national average increase of 12.3%. Average house prices in Limerick County increased by 14.6% in the year to Q2 2025 to reach €297,336. However, prices continue to remain lower than the State average of €357,851 (12.3% increase).
- In Q2 average residential rent was €2,422 in Limerick City, an increase of 14.9% during the year, while average rent in Limerick County was recorded at €1,682, an increase of 7.5% in the year to Q2. Nationally average rent increased by 6.9% during the year to reach €2,055.
- In Q2 2025, Limerick's Live Register stood at 6,399, representing a notable 9% decrease compared to the same period in 2023, when 7,032 individuals were on the Live Register.
- Average occupancy in Limerick's hotels was 86.9% in Q2, slightly higher than the national average for the same period. However, Limerick's RevPAR, (€119) remained lower than the State average (€133) in Q2.
- Some 60 jobs were announced by home care services provider Dovida in April, while Bon Secours Hospital announced plans to open a new private hospital, creating 300 new jobs. The new positions will be located at the €190m private hospital at Ballysimon.

4.2%

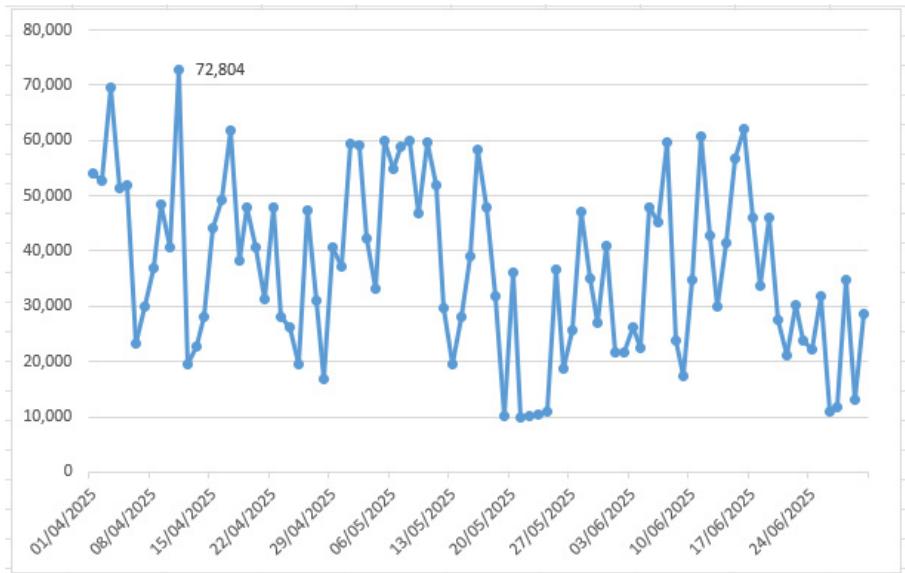
Mid West
Unemployment Rate in Q2 2025

86.9%

Hotel Occupancy Rates in
Q2 2025

Key Statistics Q2

Figure 3: Limerick City Centre Footfall, Q2 2025



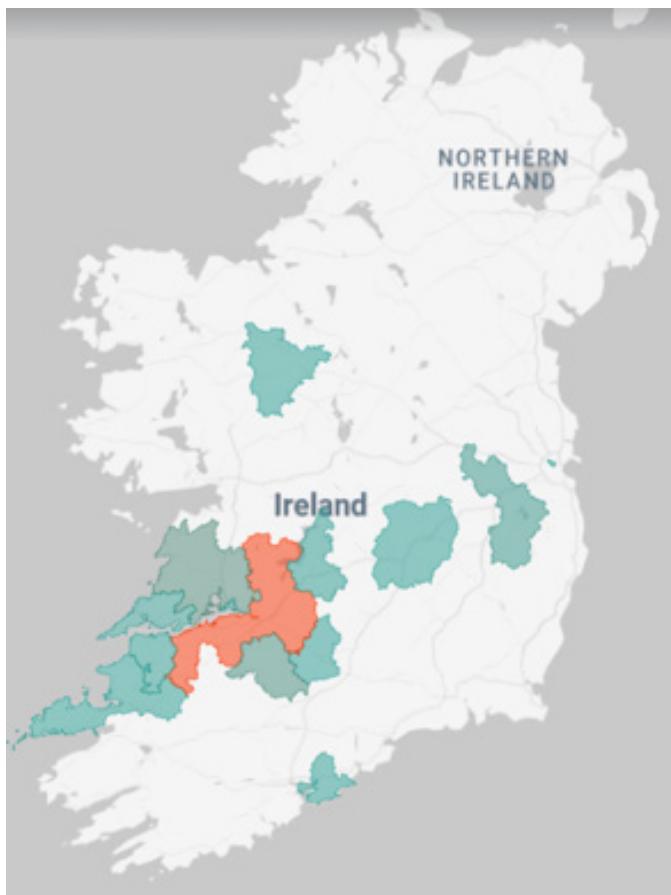
Source: Hug Signals

Note: Data from Huq Signals monitors a subsection of the population and includes pedestrian data and minimal traffic data.

Footfall

- Peaks in visitor footfall in Limerick City Centre are driven by a variety of factors including festivals and events, tourism/tourist attractions, weather and seasonal sales among other factors.
- Data from Huq Signals provides a statistical estimation of footfall for Limerick City. Footfall in Limerick City Centre reached its highest point in Q2 on Friday 11th April, with the city recording a significant 72,804 visitors to the area. Additional peaks in visitor footfall during Q2 were observed on the 1st and 2nd of May, coinciding with Riverfest Limerick and the May Bank Holiday weekend.

Map 1: Limerick City Centre Footfall Catchment Area, Q2 2025



Source: *Huq Signals*

Footfall Catchment Area

- With respect to the catchment area, 56.2% of visitors to Limerick City Centre originated from the amber area in Q2 as presented in Map 1. This area encompasses Limerick City Centre as well as parts of Limerick County, Clare and Tipperary.
- The dominance of visitors from this region highlights the City Centre's role as a hub, not only for the core but also for neighbouring areas. The amber area's geographical reach underlines the importance of Limerick City Centre as a social and economic hub for the wider Mid West Region.
- In Q2, the overall visitor catchment area for the City Centre also included parts of Limerick County, Clare, Tipperary, Cork, Mayo, Laois, Kildare and Dublin (green areas), highlighting that the city attracted visitors from a wide geographical area in Q2. It should be noted that the unshaded areas do not mean that no visitors came from that area, rather that the volumes are below Huq Signals minimum reporting threshold.

Limerick City Centre Footfall Peak in Q2 on Friday 11th April

56.2%

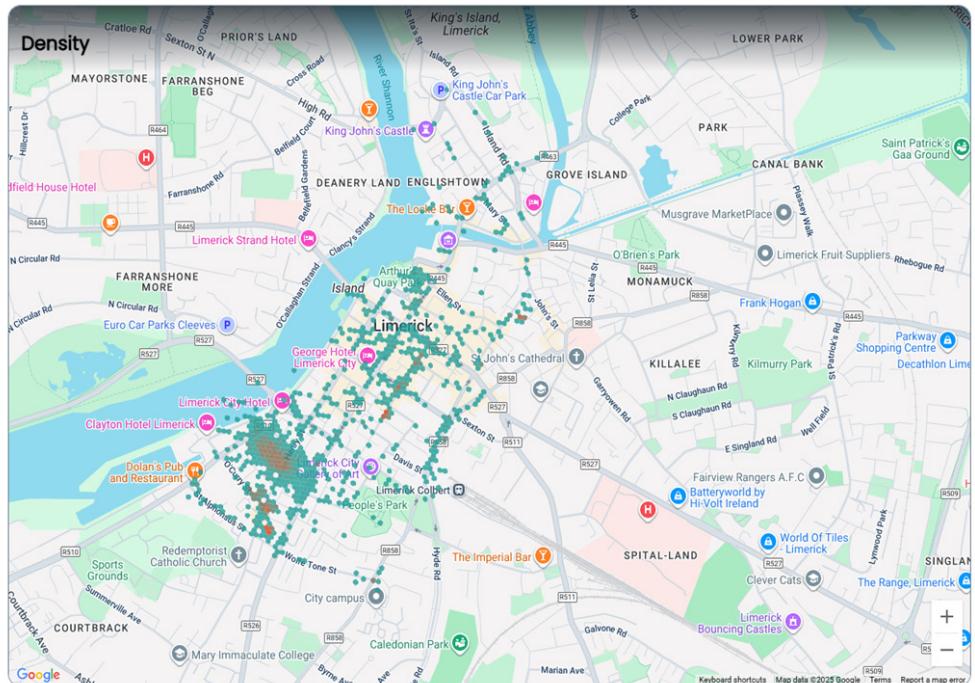
Visitors to Limerick City Centre who originated from the City as well as parts of Limerick County, Clare and Tipperary in Q2

Key Statistics Q2

Density

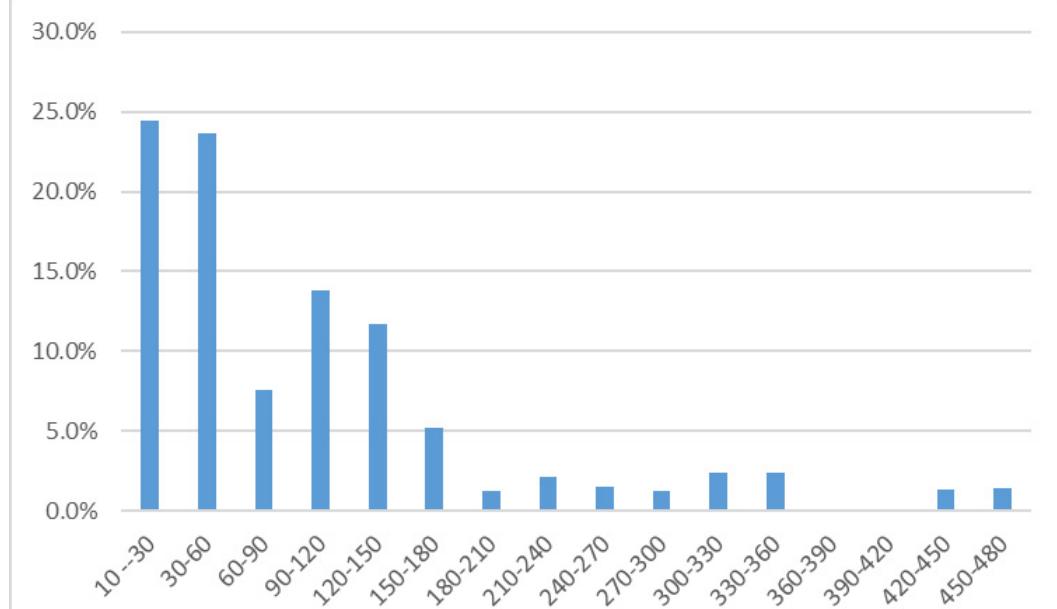
- Visitor density is an important indicator of the City Centre's performance as it reflects the level of activity in particular areas and the overall functionality of the City Centre.
- In terms of visitor density in Q2, the streets most frequently visited included Catherine Street and Thomas Street as well as the Limerick Milk Market area, which reflects the high economic activity of the service industry in these areas including shops, restaurants, public houses and cafés.

Map 2: Limerick City Centre Density, Q2 2025



Source: Huq Signals

Figure 4: Limerick City Centre Dwell Time, Q2 2025



Source: Huq Signals

24.5%

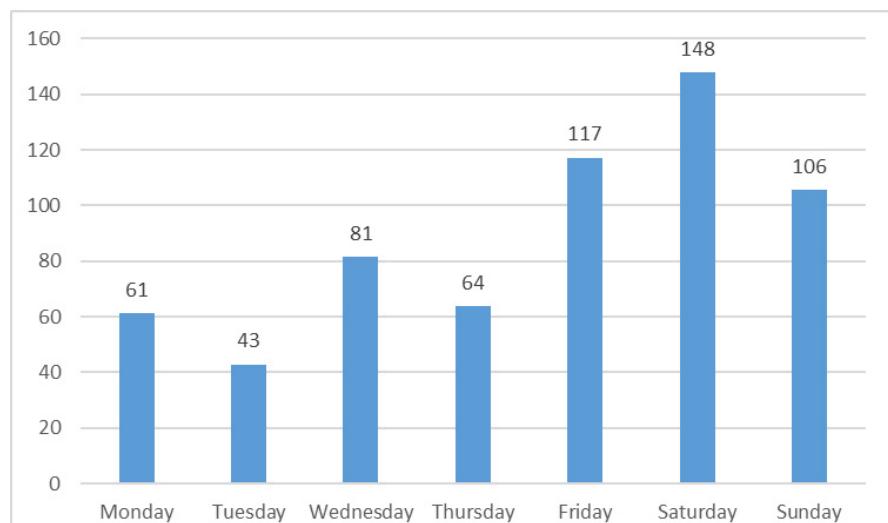
Percentage of visitors that spent between 10 and 30 minutes in Limerick City Centre in Q2 2025

Key Statistics Q2

Dwell Time by Day

- Figure 5 indicates that Saturday (148 minutes) and Friday (117 minutes) observed the highest dwell time in Limerick City Centre in Q2, followed by Sunday (106 minutes). This suggests a strong weekend engagement that is likely to be correlated with leisure, shopping and social activities.
- This is important from a planning perspective in terms of enhancing public space amenities for weekend visitors as well as scheduling cultural and other events that align with peak dwell times.

Figure 5: Limerick City Centre Dwell Time by Day, Q2 2025

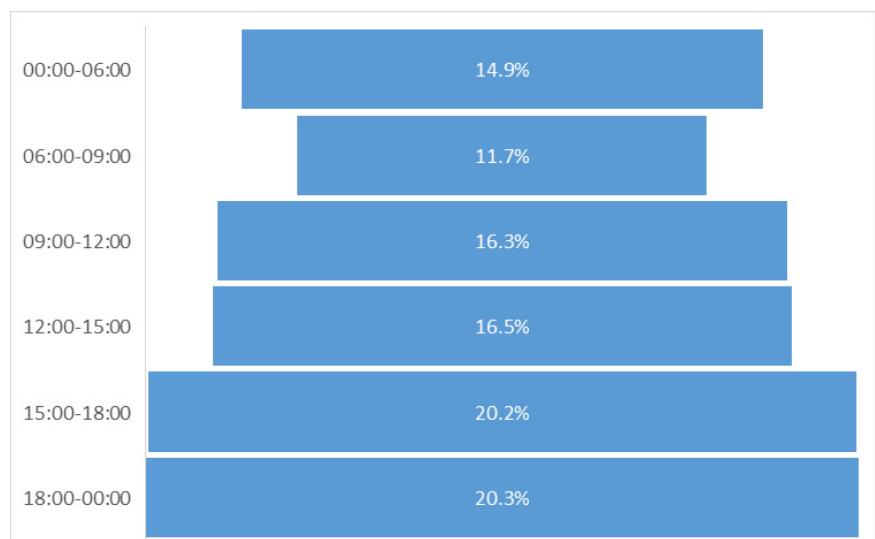


Source: Huq Signals

Visit Duration

- Figure 6 illustrates the peak visitor times in Limerick City Centre, which shows that a significant proportion of footfall occurs from 15:00 to 18:00 (20.2%) and 18:00 to 00:00 (20.3%), which highlights the strategic importance of the evening and night time economy for Limerick. From a planning perspective, it underscores the need for safe and attractive public places, as well as transport and accessibility, and policies that support extending operating hours for cultural venues, restaurants, cafés and shops.

Figure 6: Limerick City Centre Daypart Footfall, Q2 2025



Source: Huq Signals



40.5%

Of visitors to Limerick City Centre visited during the hours of 15:00 and 00:00 in Q2 2025

Key Statistics Q2

Residential Construction Activity

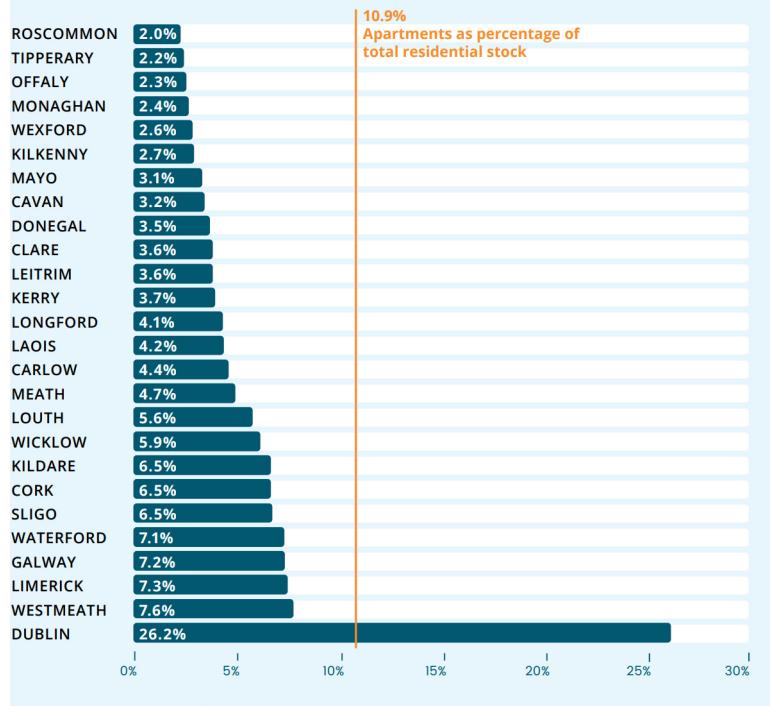
- The GeoDirectory Residential Buildings Report Q2 2025 shows that, based on the principal post town codes, residential property transaction volumes (outside of Dublin) were highest in V94 Limerick (1,549), followed by H91 Galway (1,302), and T12 Cork Southside (1,300). This illustrates the demand for residential property in Limerick.
- The report highlights that the stock of apartments continues to rise. In Q2, Limerick recorded the third highest proportion of apartments relative to its total residential stock among all counties, at 7.3% - a slight increase from 7.2% over the previous year (Figure 7).
- In the year to June 2025 a total of 544 new addresses were added to the residential stock in Limerick (Figure 8). This was significantly lower than other counties including Dublin, Cork, Galway and Kildare. When compared with Q2 2024, the number of new addresses added to the total stock in Limerick was 48.9% lower in Q2 2025 (compared with 1,064 new units in Q2 2024), which was the highest decline experienced across the counties (Table 2). It is crucial that supply is keeping pace with demand to continue to attract skilled and talented labour and investment.
- In relation to construction activity, Limerick accounted for 2.8% of the total construction activity nationally in Q2.

Table 2: Percentage of New Addresses added by County, and Year-on-Year Change Q2 2025

County	New addresses as % of total county stock	New addresses as % of total stock	% YoY change in new addresses added
CARLOW	0.9%	0.7%	-32.9%
CAVAN	1.0%	1.0%	35.3%
CLARE	1.2%	2.1%	31.8%
CORK	1.4%	10.2%	-7.1%
DONEGAL	0.8%	2.0%	-6.8%
DUBLIN	2.1%	38.7%	21.5%
GALWAY	1.2%	4.3%	9.2%
KERRY	0.8%	1.8%	-13.5%
KILDARE	1.8%	5.3%	9.3%
KILKENNY	1.1%	1.4%	-32.9%
LAOIS	2.2%	2.4%	-3.8%
LEITRIM	0.7%	0.4%	-16.0%
LIMERICK	0.6%	1.6%	-48.9%
LONGFORD	0.8%	0.5%	20.2%
LOUTH	2.4%	4.1%	10.8%
MAYO	0.6%	1.3%	-11.7%
MEATH	2.2%	5.5%	1.0%
MONAGHAN	0.8%	0.7%	-23.4%
OFFALY	1.0%	1.0%	-32.3%
ROSCOMMON	0.9%	0.9%	80.0%
SLIGO	1.1%	1.1%	46.4%
TIPPERARY	1.1%	2.3%	58.4%
WATERFORD	1.2%	2.1%	4.3%
WESTMEATH	1.5%	1.7%	-22.0%
WEXFORD	1.5%	3.4%	3.2%
WICKLOW	1.9%	3.7%	-12.6%

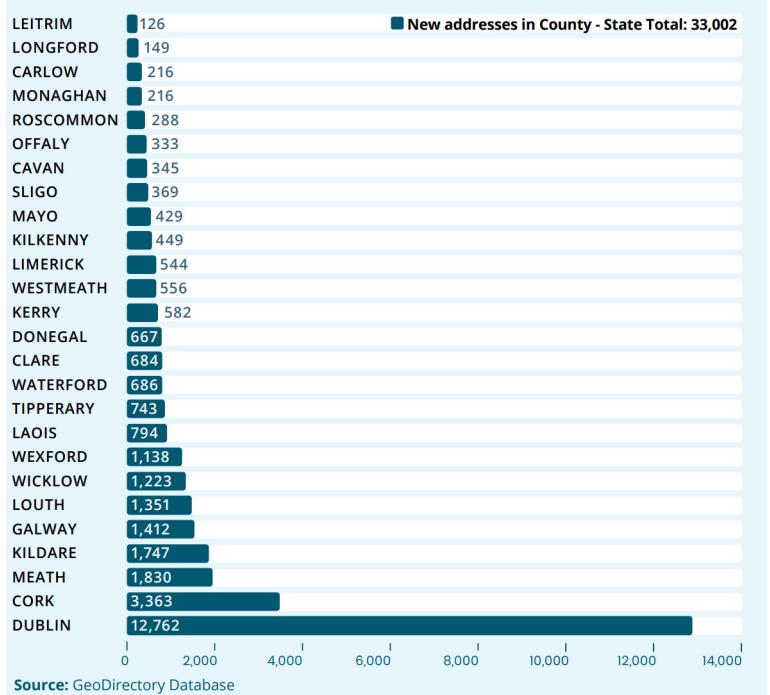
Source: GeoDirectory Database

Figure 7: Apartments as a Percentage of Total Residential Stock by County, Q2 2025



Source: GeoDirectory Database

Figure 8: New Addressed added to the stock of Residential Dwellings by County, Q2 2025



Source: GeoDirectory Database

Key Statistics Q2

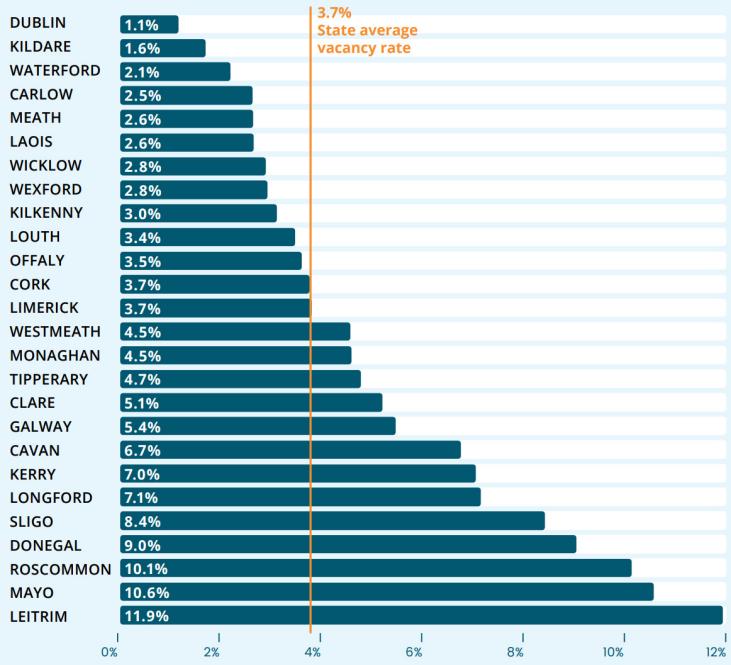
Residential Vacancy and Dereliction Rates

- According to the latest GeoDirectory Report, Limerick's residential vacancy rate stood at 3.7% in Q2 2025, mirroring the national average for the same period (Figure 9). This represents a slight improvement from 3.8% in Q2 2024, indicating modest progress in occupancy levels across the county.
- On a national scale, there were 19,821 derelict residential units as of Q2 2025. Limerick accounted for 5.3% of this total, with 1,051 derelict units identified (Figure 10). Encouragingly, all counties, including Limerick, experienced a decline in the number of derelict address points compared to Q2 2024, indicating progress in addressing long-term vacancy and dereliction.

Property Transactions

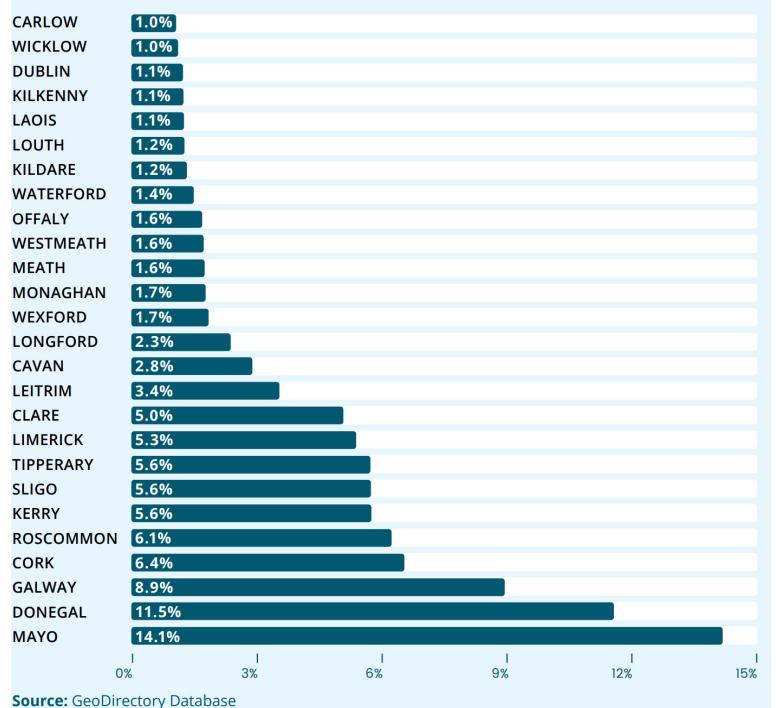
- In the year to Q2 2025, Limerick recorded 1,640 residential property transactions, marking a 3.5% increase compared to the same period in 2024. Notably, Limerick was one of only five counties nationwide to experience growth in transaction volumes, indicating the continued demand for housing.
- Of these transactions, 21.5% were new dwellings, a significant rise from 11.6% in Q2 2024, suggesting an increase in newly built homes entering the market despite broader supply constraints.
- The GeoDirectory Report indicates that the average property price in Limerick rose to €321,159, up from €284,984 a year earlier - an increase of approximately 12.7%. This reflects both strong demand and limited new supply, which is contributing to upward pressure on prices.

Figure 9: Residential Vacancy Rate by County, Q2 2025



Source: GeoDirectory Database

Figure 10: Derelicts by County, % share of State Total, Q2 2025



Source: GeoDirectory Database

Forward Planning Update Q2

Commencements

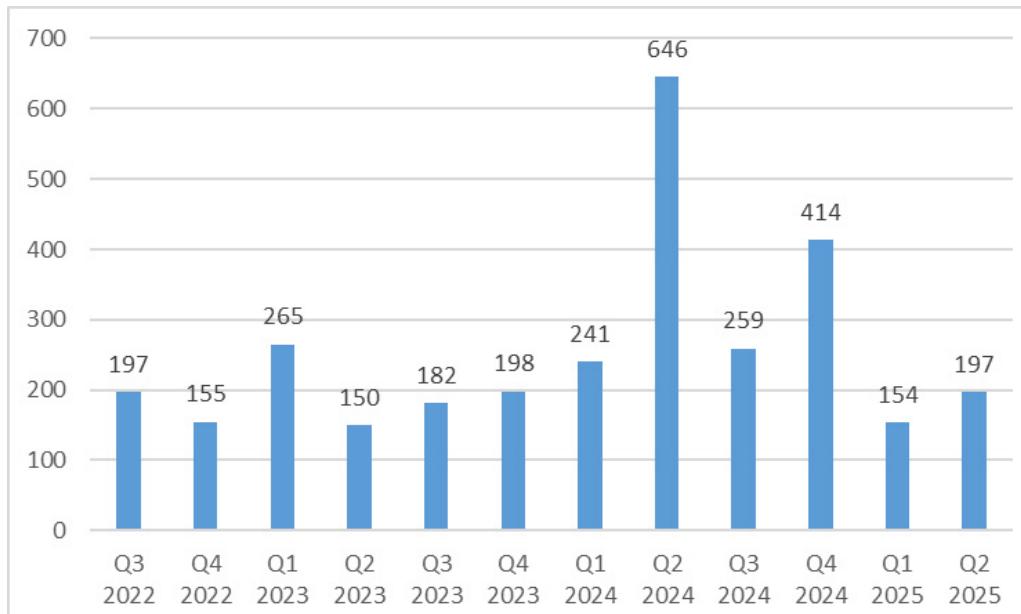
- According to the Department of Housing, Local Government and Heritage, construction had commenced on 197 new homes in Limerick City and County in Q2 2025 (Figure 11).

- While residential commencements in Limerick remain below the quarterly target of 649 units in the Core Strategy of the Limerick Development Plan

2022-2028, Q2 and Q4 2024 marked a more noticeable increase in the number of commencements relative to previous quarters.

- From Q3 2022 to Q2 2025, a total of 3,058 new residential units (houses and apartments) were commenced in Limerick City and County.

Figure 11: Limerick City and County Commencements, Q3 2022 - Q2 2025



Source: Department of Housing, Local Government and Heritage



3,058

Residential commencements in Limerick City and County from Q3 2022 to Q2 2025

197

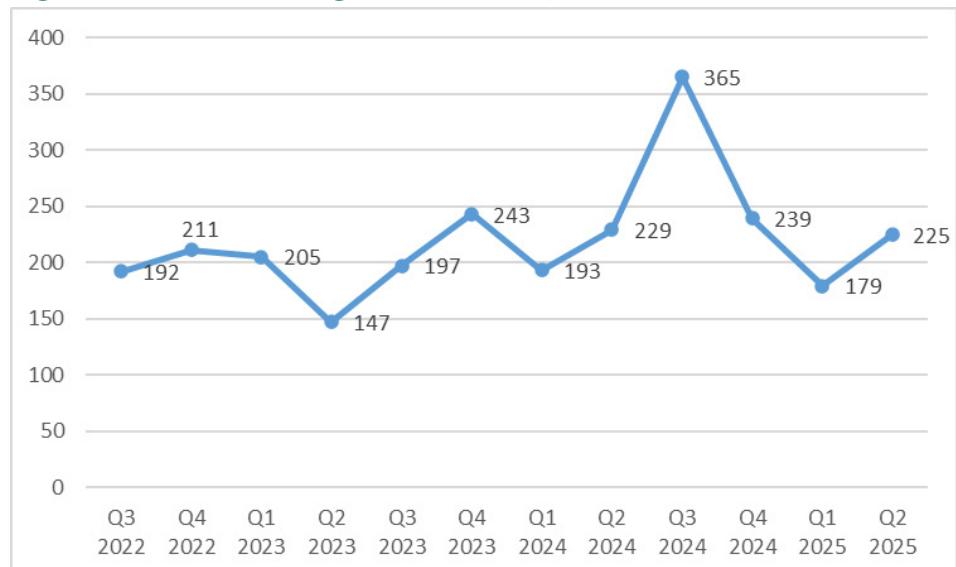
Residential commencements in Limerick City and County in Q2 2025

Forward Planning Update Q2

New Dwelling Completions

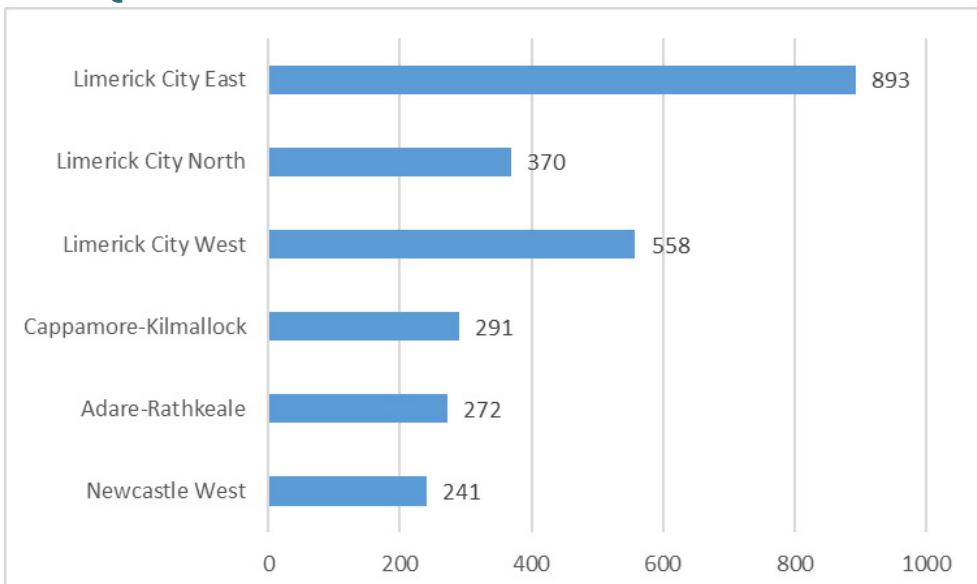
- A total of 2,625 new dwellings were completed in Limerick from Q3 2022 to Q2 2025 (Figure 12). The number of new dwelling completions is below the Core Strategy targets in the Limerick Development Plan 2022-2028. The Core Strategy identifies an average of 2,598 additional units required per annum from 2022 to 2028.
- It should be noted that there is a significant number of live planning permissions, including those that pre-date the Development Plan for residential units across the City and County. In this regard, it would appear that economic conditions are stifling the delivery of dwelling units. A total of 225 new dwelling completions were recorded in Q2 2025.
- From Q3 2022 to Q2 2025, the majority of new dwellings were completed in Limerick City and Suburbs, in particular in Limerick City East (34%), followed by Limerick City West (21.3%), which mirrors the strong population growth in these electoral areas in recent years.
- The majority of completions (59.1%) were constructed as part of housing estates from Q3 2022 to Q2 2025.

Figure 12: New Dwellings Completions, Q3 2022- Q2 2025



Source: Department of Housing, Local Government and Heritage, CSO

Figure 13: New Dwellings Completed by Local Electoral Area, Q3 2022 - Q2 2025



Source: Department of Housing, Local Government and Heritage, CSO

85,363

Dwellings in Limerick
City and County April
2022

2,625

New dwelling completions
from Q3 2022 - Q2 2025

225

New dwelling completions
in Q2 2025

Forward Planning Update Q2

Planning Permissions

- With respect to planning permissions between Q1 2019 to Q2 2025, a total of 1,772 residential applications had live planning permission across Limerick City and County (Table 3).
- The 1,772 residential applications comprise a total of 8,104 units (houses and apartments) with live planning permission. Of these applications, some 917 (2,973 units) applications had commenced construction.
- The majority of units granted comprise three bedroom units (36.3%) followed by two bedroom units (27.4%) as presented in Table 5. The area 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.

Table 3: Live Planning Permissions, Limerick City and County, Q1 2019 - Q2 2025

Planning Permissions Q1 2019 - Q2 2025	Applications	No. of Units
No. of Live Residential Applications with Permission	1,772	8,104
Commenced	917	2,973 (2,313 houses & 660 apartments)
Not Commenced	855	5,131

Source: Forward Planning, Limerick City and County Council

Table 4: Live Planning Permissions, by Unit Type, Limerick City and County, Q1 2019 - Q2 2025

Unit Type	Total No. of Units
Apartments	2,695
Houses	5,409
Total	8,104

Source: Forward Planning, Limerick City and County Council

Note: * includes 625 bedspaces

Table 5: Live Planning Permissions, Breakdown of Unit Type, Limerick City and County, Q1 2019 - Q2 2025

Breakdown of Unit type	
Studios	54
1 Bed	1,141
2 Bed	2,219
3 Bed	2,941
4+ Bed	1,749
Total	8,104

Source: Forward Planning, Limerick City and County Council

1,772

Residential applications with live planning permission from Q1 2019 to Q2 2025

8,104

Total number of residential units with live planning permission from Q1 2019 to Q2 2025

917

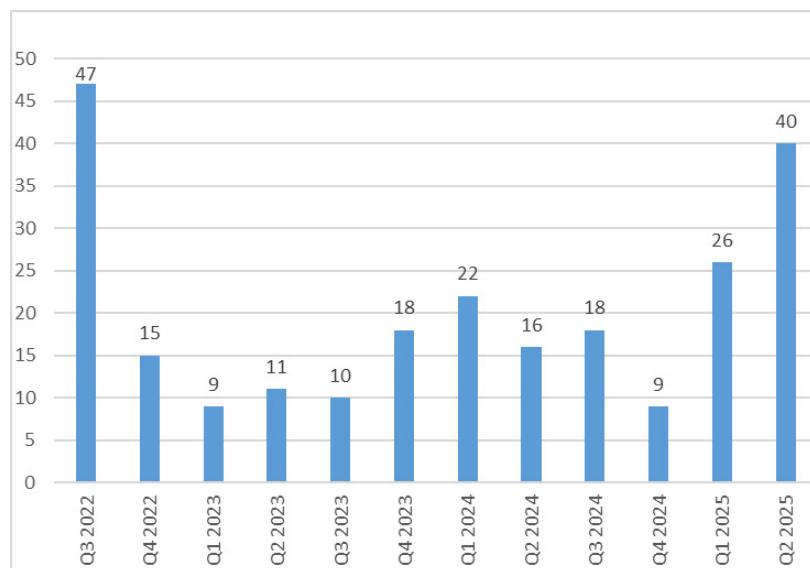
Applications that had commenced construction from Q1 2019 to Q2 2025

Key Town - Newcastle West Update Q2

Newcastle West

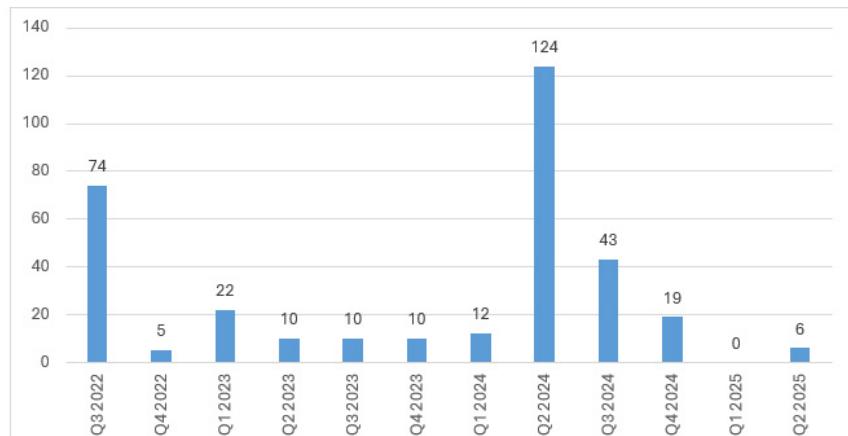
- This quarter of the Forward Planning Update provides insight into new dwelling completions and commencements in Limerick's Key Town Newcastle West, since the adoption of the Limerick Development Plan 2022-2028.
- Newcastle West is designated as a key town in the Limerick Development Plan 2022–2028, with a projected population increase of 1,988 (30% above 2016 levels), requiring approximately 800 new residential units. However, growth is constrained by limited wastewater infrastructure. While lands are zoned for housing, many are classified as 'serviced sites' and they remain undeveloped due to inadequate sewerage provision. Sustainable development hinges on timely upgrades to water and wastewater services to support residential expansion.
- From Q3 2022 to Q2 2025, Newcastle West recorded a total of 241 new dwelling completions, which was the lowest number of completions among the Municipal Districts in Limerick.
- With regards to new dwelling commencements, from Q3 2022 to Q2 2025, Newcastle West recorded a total of 335 commencements with a significant number in Q2 2024 (124).
- Data on planning permissions indicates that between Q1 2019 to Q2 2025, a total of 369 residential applications (883 houses and apartments) had live planning permission across Newcastle West. This includes 748 houses and 135 apartments.

Figure 14: New Dwelling Completions, Newcastle West, Q3 2022 - Q2 2025



Source: Forward Planning, Limerick City and County Council

Figure 15: Commencements, Newcastle West, Q3 2022 - Q2 2025



Source: Forward Planning, Limerick City and County Council



369

Residential Applications with Live
Planning Permission in Newcastle
West between Q1 2019 and Q2 2025

335

Applications Commenced in
Newcastle West from Q3 2022 and
Q2 2025



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