Comhairle Cathrach & Contae Luimnigh
Limerick City & County Council

ATLANTIC EDGE LIMERICK EUROPEAN EMBRACE

Limerick City and County Council

Retail Strategy for Limerick – Shannon Metropolitan Area and County Limerick 2022 - 2028

Adopted June 2022

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Contents

1	Introduction	1
1.1	Structure and Key Outputs	2
1.2	Approach	3
1.3	Defining Study and Catchment Areas	4
2	National, Regional and Local Policy Context	5
2.1	National Policy Context	5
2.1.1	National Planning Framework – Ireland 2040 Our Plan	6
2.1.2	National Development Plan 2018-2027	6
2.1.3	Our Rural Future: Rural Development Policy 2021-2025	6
2.1.4	Retail Planning Guidelines (2012) and Retail Design Manual (2012)	7
2.1.5	Framework for Town Centre Renewal (2017)	10
2.1.6	Rural Regeneration and Development Fund	12
2.1.7	Urban Regeneration and Development Fund	12
2.2	Regional Policy Context	14
2.2.1	Regional Spatial and Economic Strategy for the Southern Region	14
2.2.2	Mid-West Area Strategic Plan 2012-2030	16
2.2.3	The Retail Strategy for the Mid-West Region 2010-2016	17
2.2.4	County Kerry Retail Strategy 2015-2021	19
2.2.5	Cork City Retail Strategy 2015-2021	19
2.2.6	North Tipperary County Retail Strategy 2010	20
2.2.7	Galway City Retail Strategy 2017-2023	20
2.3	Local Policy Context	21
2.3.1	County Limerick	21
2.3.2	County Clare	30
2.4	Retail Hierarchy	33
3	Retail Trends	37
3.1	Current Retail and Consumer Trends	37
3.2	Retail Sales Overview	41
3.2.1	State Retail Sales Volume Overview 2019-2020	43
3.2.2	High Streets Task Force	44

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4 Household Retail Surveys 46
4.1 Methodology 46
4.1.1 Household Phone Survey Methodology 46
4.1.2 Online Survey Methodology 46
4.2 Shopper Survey Results 46
4.3 Household Survey Results 47
4.3.1 County Limerick 48
4.3.2 Limerick Catchment 52
4.3.3 Newcastle West Catchment 56
4.3.4 Summary of Key Survey Results 60
4.3.5 Inflow and Outflow 70

5 Town Centre Health Checks 79
5.1 Overview 79
5.2 Consultation 80
5.3 County Limerick and Limerick Shannon Metropolitan Area 82
5.3.1 Limerick City 82
5.3.2 Newcastle West 88
5.3.3 Shannon 94
5.4 District Centres and Retail Parks 97
5.4.1 Dooradoyle (Crescent Shopping Centre) 98
5.4.2 Childer's Road Retail Park/Ballysimon Road Study Area – Childer's Retail Park/ City East Retail Park and Eastpoint Business Park 100
5.4.3 Parkway Shopping Centre/ Parkway Retail Park 102
5.4.4 Roxboro Shopping Centre 104
5.4.5 Castletroy Shopping Centre 105
5.4.6 Caherdavin (Jetland Shopping Centre) 107

6 Projected Retail Floorspace Requirements 110
6.1 Introduction 110
6.1.1 Methodological Approach 110
6.1.2 Defining Study and Catchment Areas 111
6.2 Population 113
6.2.1 Limerick Catchment Population 113

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6.3 Expenditure Estimates 114
6.4 Total Available Expenditure 115
6.5 Adjusted Expenditure 117
6.6 Retail Floorspace Assessments 119
6.6.1 Existing Floorspace and Gross to Net Ratios 119
6.6.2 Observed Vacant Floorspace 120
6.7 Indicative Existing Turnover 121
6.8 Representative Existing Turnover 122
6.9 Assumed Future Turnover 123
6.10 Residual Capacity 123
6.10.1 Convenience Goods 124
6.10.2 Comparison Goods 125
6.10.3 Bulky Goods 126
6.11 Future Floorspace Potential – Unadjusted for Vacancy 126
6.12 Assumed Net Vacant Floorspace 127
6.13 Future Floorspace Potential – Adjusted for Vacancy 129
6.14 Future Pipeline Supply 130
6.15 Future Floorspace Potential – Adjusted for Vacancy and Pipeline Supply 133
6.16 Final Future Floorspace Potential 134
6.16.1 Allocation within the Limerick Catchment Retail Area 134
6.16.2 Final (Allocated) Future Floorspace Potential 135
6.16.3 Distribution of Floorspace within Limerick City and District Centres 137

7 Retail Planning Policies and Criteria for Assessment of Retail Development 139
7.1 Retail Settlement Hierarchy 139
7.2 Core Retail Areas and Retail Opportunity Sites 140
7.2.1 Limerick 141
7.2.2 Shannon 143
7.2.3 Newcastle West 144
7.3 Planning Policies, Objectives and Criteria for Assessment of Retail Development 145
7.3.1 Limerick 145

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7.4 Criteria for Assessment of Retail Development 151
7.4.1 The Sequential Test 151
7.4.2 Retail Impact Assessments 152
7.4.3 Traffic and Transport Assessments 153
7.4.4 Criteria for the Assessment of Different Development Types 153
7.4.5 Local Shops 156
7.4.6 Retailing and Motor Fuel Stations 156
7.4.7 Retailing in Small Towns and Villages 156
8 Conclusion 157

List of Figures

Figure 1-1: Study Area 1
Figure 1-2: Proposed methodology 3
Figure 1-3: Retail Study Catchment Areas 4
Figure 2-1: Health Check Indicators (Framework for Town Centre Renewal, DBEI 2017)....11
Figure 2-2: Retail Hierarchy of Towns in County Limerick and the Metropolitan Area..36
Figure 2-3: Limerick-Shannon Metropolitan Area Retail Hierarchy 36
Figure 3-1: Customer Trend Overview (Source: KPMG)....39
Figure 3-2: Focus on the Home (Source: KPMG) 40
Figure 3-3: Retail Sales Index 2015 - 2020 Q2....42
Figure 3-4: Retail Sales Values (2015 - 2020 Q2) 42
Figure 3-5: Percentage Change in Retail Sales Volumes (Feb 2020 - Jan 2021) 43
Figure 4-1: Survey respondent age group breakdown 60
Figure 4-2: Change in regular shopping frequency and location 61
Figure 4-3: Shopping frequency across categories....63
Figure 4-4: Expenditure across categories (excl. bulky goods)....63
Figure 4-5: Expenditure on bulky goods 64
Figure 4-6: Determining factors for preference of shopping location 65
Figure 4-7: Preferred mode of transport when shopping....65
Figure 4-8: Online shopping habits and frequency 66
Figure 4-9: Online shopping preference per category....67
Figure 4-10: Last expenditure on online shopping 67
Figure 4-11: Increased preference for online shopping....68

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Figure 4-12: Motivation for increased online shopping....68
Figure 4-13: Annual and Monthly Volume % Changes for Retail Sales January 2021 vs. January 2020 – CSO (March 2021)....72
Figure 4-14: ITIC's outlook of recovery scenarios in tourism sector (ITIC, January 2021) 74
Figure 4-15: ITIC's outlook of recovery scenarios – tourist volumes (000s)....76
Figure 4-16: ITIC's outlook of recovery scenarios – tourist revenue (€m)....76
Figure 5-1: Dunnes Stores (Harvey Quay) Shopping Centre from Bedford Row (Source Film.limerick.ie)....82
Figure 5-2: Little Catherine Street (Source Film.limerick.ie)....83
Figure 5-3: King John's Castle (Source: Irish Times)....84
Figure 5-4: Vacant retail units in Limerick City....87
Figure 5-5: Limerick Local Link Network (Source: Local Link)....90
Figure 5-6: Monument located on Market Square (Source National Inventory of Architectural Heritage)....91
Figure 5-7: Newcastle West Vacant Retail Units....93
Figure 5-8: Shannon Airport (Source Clare FM)....95
Figure 5-9: Vacant retail units in Shannon....97
Figure 5-10: Vacant units in the Crescent Shopping Centre....99
Figure 5-11: Vacant units within the Childer's Road/Ballysimon Road Study Area....101
Figure 5-12: Parkway Vacant units....103
Figure 5-13: Vacant units in Roxboro Shopping Centre....105
Figure 5-14: Castletroy Retail and Vacancy....107
Figure 5-15: Vacant units within the Jetland Shopping Centre....109
Figure 6-1: 20-minute drive time reach from Key Towns in Catchment Areas....112
Figure 6-2: Retail Study Catchment Areas....112
Figure 6-3: Commercial Planning Applications in MASP....132
Figure 6-4: Commercial Planning Applications in Newcastle West....132
Figure 7-1: Limerick Opportunity Sites....141
Figure 7-2: Shannon opportunity sites....143
Figure 7-3: Newcastle West opportunity sites....144
Figure 8-1: Retail Buildings Identified within Study Area of Newcastle West....7
Figure 8-2: Retail and Vacant Buildings Identified within Study Area of Newcastle West 8
Figure 8-3: Walking Time Analysis from District Shopping Centres and Large Supermarkets....10

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List of Tables

Table 1.1: Structure of Retail Strategy....2
Table 2.1: Policy context review....5
Table 2.2 URDF funding allocations for Limerick, March 2021....13
Table 2.3: Limerick City and County Retail Hierarchy....34
Table 2.4: Limerick-Shannon Metropolitan Area Retail Hierarchy....35
Table 3.1: Retail Sales Index 2015 - 2020 Q2....41
Table 4.1: Number of survey responses per County....60
Table 4.2: Summary of Core Inflow, Outflow and Leakage....70
Table 4.3: Applied Rates of Online Outflow - Informed by Historic CSO and Assumed Future Shopping Habits....73
Table 4.4: Tourist Spend: Assumed Split by Catchment Area....78
Table 5.1: Diversity of uses within Limerick City Centre....86
Table 5.2: Overall retail vacancy within Limerick City Centre....86
Table 5.3: Diversity of uses within Newcastle West....92
Table 5.4: Overall retail vacancy within Newcastle West....92
Table 5.5: Diversity of uses within Shannon....96
Table 5.6: Overall retail vacancy within Shannon....96
Table 5.7: Diversity of uses within the Crescent Shopping Centre....98
Table 5.8: Overall Vacancy within the Crescent Shopping Centre....98
Table 5.9: Diversity of uses within Childers/Ballysimon Road Study Area....100
Table 5.10: Overall retail vacancy within Childer's Road Retail Park/Ballysimon Road Study Area....101
Table 5.11: Diversity of uses within Parkway....102
Table 5.12: Overall retail vacancy within Parkway....102
Table 5.13: Diversity of uses within Roxboro....104
Table 5.14: Overall retail vacancy within Roxboro....104
Table 5.15: Diversity of uses in Castletroy Shopping Centre....106
Table 5.16: Overall retail vacancy within Castletroy Shopping Centre....106
Table 5.17: Diversity of uses within Jetland SC....108
Table 5.18: Overall retail vacancy within Jetland SC....108
Table 6.1: Catchment Population Projections....113
Table 6.2: Determination of State Level Convenience and Comparison Retail Sales Turnovers....114

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Table 6.3: Per Capita Expenditure Estimates on Convenience and Comparison Goods - Limerick 115
Table 6.4: Total Available Expenditure (Projected 2021 Prices) 116
Table 6.5: Adjusted Total Available Expenditure - Convenience Goods 117
Table 6.6: Adjusted Total Available Expenditure - Comparison Goods 118
Table 6.7: Adjusted Total Available Expenditure - Bulky Goods 118
Table 6.8: Total Retail Floorspace within Catchment Area 119
Table 6.9: Retail Floorspace Vacancy within Study Areas 120
Table 6.10: Indicative Turnover Generated by Existing Retail Floorspace 121
Table 6.11: Representative Turnover of Existing Retail Floorspace 122
Table 6.12: Expenditure Available for New Retail - Convenience Goods (Residual Surplus and Floorspace Capacity) 124
Table 6.13: Expenditure Available for New Retail - Comparison Goods (Residual Surplus and Floorspace Capacity) 125
Table 6.14: Expenditure Available for New Retail - Bulky Goods (Residual Surplus and Floorspace Capacity) 126
Table 6.15: Indicative Future Retail Floorspace Potential (Cumulative) 127
Table 6.16: Adjusted Vacant Floorspace by Assumed Retail Category Distribution 128
Table 6.17: Indicative Future Retail Floorspace Potential (Cumulative) - Adjusted for Vacancy 129
Table 6.18: Total floorspace for Granted but NOT Commenced Retail Planning Applications 130
Table 6.19: Total floorspace for Commenced but Not Completed Retail Planning Applications 131
Table 6.20: Allocated Extant Permissions - Consideration of Planning Pipeline 133
Table 6.21: Indicative Future Retail Floorspace Potential (Cumulative) - Adjusted for Vacancy and Pipeline 134
Table 6.22: Final Future Retail Floorspace Potential (Cumulative) - Adjusted for Vacancy and Pipeline 136
Table 7.1: Limerick Retail Hierarchy 139
Table 7.2: Limerick - Shannon Retail Hierarchy 140
Table 7.3: Limerick Opportunity Sites Development Potential 141
Table 7.4: Shannon Opportunity Sites Development Potential 143
Table 7.5: Newcastle West Opportunity Sites Development Potential 144
Table 8.1: Retail NACE Description and Categorisation 6
Table 8.2: Example of Data Attribute Table 8

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1 Introduction

This Retail Strategy has been prepared by KPMG Future Analytics on behalf of Limerick City and County Council in accordance with provisions set out in National and Regional Policy and in the 'Retail Planning Guidelines for Planning Authorities' published by the Department of the Environment, Heritage and Local Government (DoEHLG) in 2012. The Strategy's overall study area is made up of two component parts as shown on Figure 1-1, which consist of:

— Limerick Shannon Metropolitan Area;

— County Limerick, excluding the area within the Limerick Shannon Metropolitan Area.

This Retail Strategy has been prepared concurrently with the Retail Strategy for County Clare on behalf of Clare County Council, which also covers the Limerick Shannon Metropolitan Area. The process for the preparation of the Retail Strategies for the two counties has been undertaken in accordance with the Regional Spatial and Economic Strategy for the Southern Region and the Retail Planning Guidelines (2012) recommendations for a Joint Retail Strategy, in order to form a coherent and integrated assessment of retail catchments that straddle and transcend administrative boundaries. The joint strategy is presented in two separate reports, which reflects that the study informs two separate statutory Development Plan processes that are at different stages of adoption.

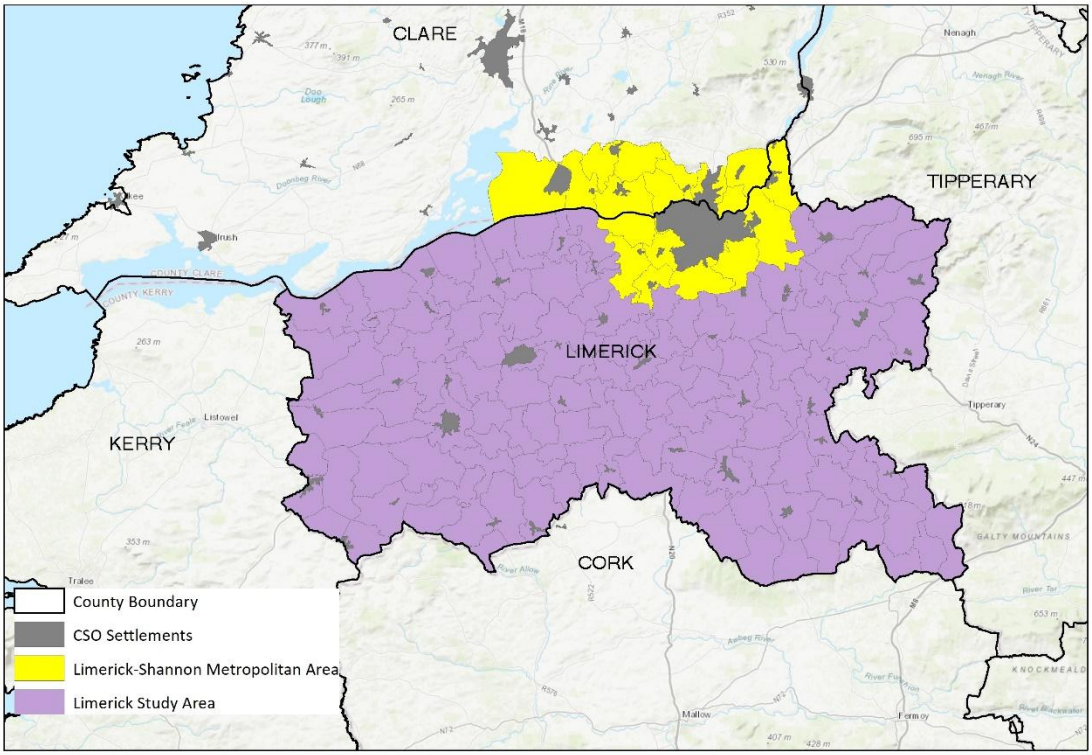


Figure 1-1: Study Area

The overriding aim of the strategy is to create the appropriate conditions necessary to foster a healthy and vibrant retail environment in Limerick City Centre and throughout

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the Metropolitan Area and County Limerick to help improve the retail environment, enhance the vitality of urban areas and effectively manage and support positive change.

1.1 Structure and Key Outputs

The following overall structure of this Strategy is summarised below:

Table 1.1: Structure of Retail Strategy

Section 1	Introduction
Section 2	National, Regional and Local Policy Context
Section 3	Current Retail Trends
Section 4	Shopper and Household Retail Surveys
Section 5	Town Centre Health Checks
Section 6	Projected Retail Floorspace Requirements
Section 7	Retail Planning Policies and Criteria for Assessment
Section 8	Conclusion

The key outputs of this Retail Strategy are as follows:

I. Analysis of national and regional retail policy and national and regional retail trends.
II. Analysis of the change that has occurred in retailing within the study area since the last Strategy.
III. Household surveys, shopper surveys, online surveys and pedestrian counts.
IV. An analysis of current shopping patterns in County Limerick and portions of its study areas overlapping into County Clare.
V. Town 'health checks' including recommendations with regard to improving the health, vitality and viability.
VI. Identify the main components of the regional Retail Hierarchy.
VII. Identify the main components of the Retail Hierarchy of the county, including District Centres if any within the main settlements where appropriate.
VIII. Identify the level and form of retailing activity appropriate to all the components of the Retail Hierarchy and also any District Centres if applicable within the identified settlements.
IX. Define, by way of a map, the boundaries of the core retail areas of the main town/village settlements and also the location of any District Centres.
X. Prepare a quantitative assessment of the requirement for additional retail floorspace (square metres) on a catchment basis for each of the settlements.
XI. Provide strategic guidance on the location and scale of retail development to support the retail hierarchy (Town Centre and District Centre, villages, rural areas).
XII. Identify opportunity sites in each of the settlements which could be used to suit the variety of required retail formats, including requirements for large floor plate and modern retail format.

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XIII. Development Management criteria tailored for each of the settlements having regard to the findings above where appropriate.

XIV. Appropriate Development Plan policies/objectives necessary for ensuring vital and vibrant Town and Village Centres.

1.2 Approach

The approach undertaken in preparing the Retail Strategy establishes the retail market dynamics at play and the retail needs of the study area's residents. It has been prepared in keeping with the local, regional and national guidelines in its approach to establishing the quantitative underpinning for existing and future retail capacity. The areas examined are:

— Limerick Shannon Metropolitan Area;

— County Limerick, excluding the area within the Limerick Shannon Metropolitan Area.

The methodology in Figure 1-2 was used to establish the quantitative assessment of the requirement for additional retail floorspace for the three study areas and recommendations for the future distribution of this additional floorspace taking account of the existing retail hierarchy in the Counties.

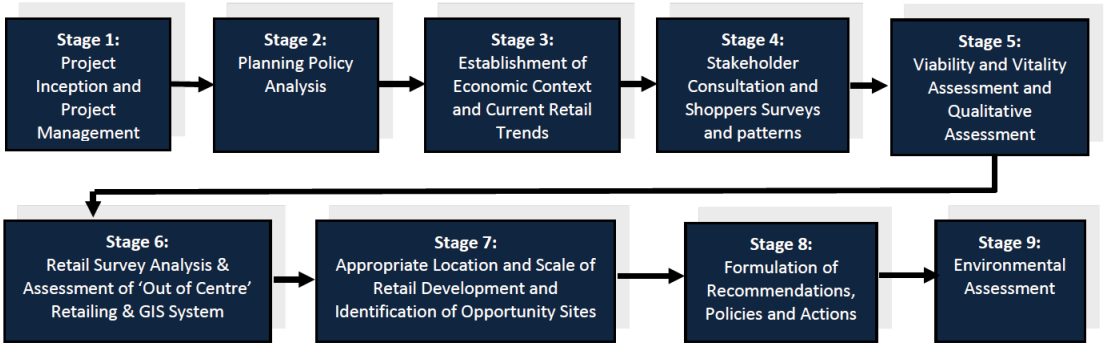


Figure 1-2: Proposed methodology

This proposed methodology ensured the complete delivery of a clear and coherent retail strategy, with reference to retail planning and policy framework with regards to the Retail Planning Guidelines 2012, market interest in new retail development, the changing population, the need to meet needs and expectations, the need for workforce retention, the maximisation of the central national position, ensuring the delivery of economic activity, consideration of increasing urbanisation, the identification of new locations of retail activity and opportunities and the consideration of retail vacancy issues.

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1.3 Defining Study and Catchment Areas

For the purpose of this assessment the County of Limerick has been subdivided into the following retail catchment areas:

County Limerick

— Limerick Catchment[1]

— Newcastle West Catchment.

Further detail on the derivation of each catchment is available in Section 6.2.1. Figure 1-3 below shows the catchment areas within County Limerick, with the addition of the Metropolitan Area and its extended catchment area in a portion of County Clare.

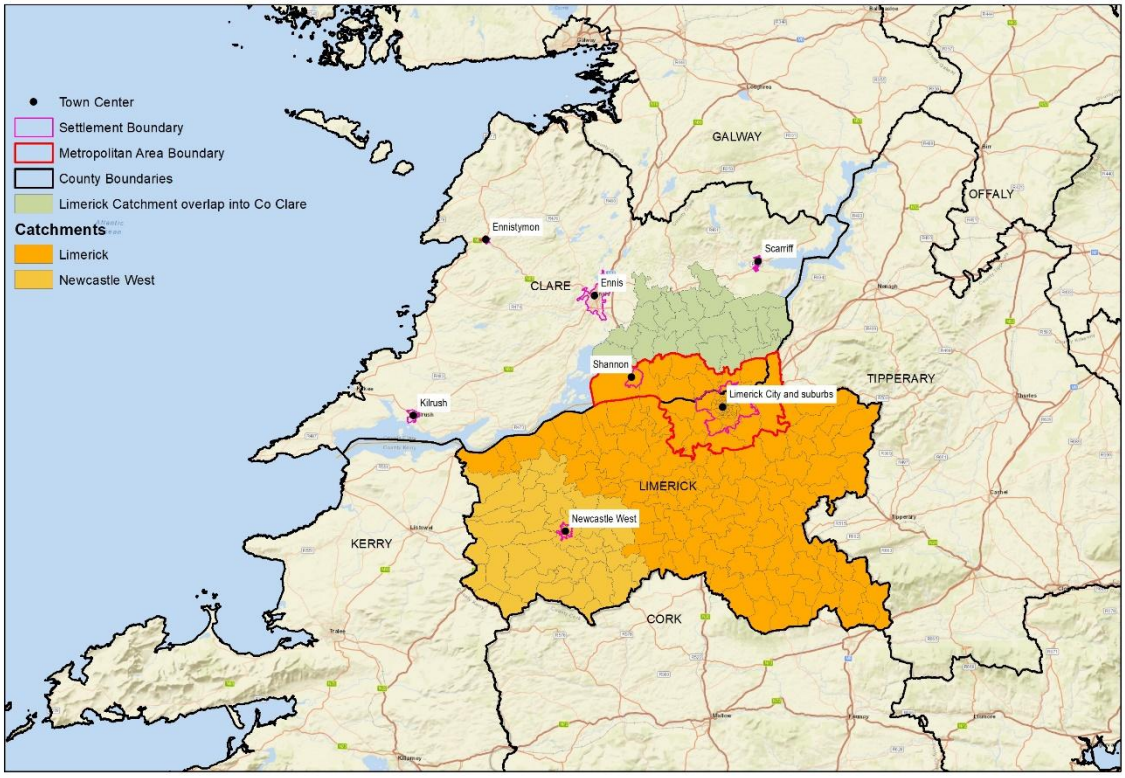


Figure 1-3: Retail Study Catchment Areas

[1] The 'Limerick Catchment' includes Limerick City and Suburbs, the Metropolitan Area and parts of both County Limerick and County Clare.

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2 National, Regional and Local Policy Context

The aim of this section is to provide an outline summary of the main policy documents that shaped the development of the Retail Strategy for the Limerick – Shannon Metropolitan Area and County Limerick 2022 - 2028. It is necessary to have consideration to development trends already established via overarching regional and national strategies and to incorporate them into this policy document.

This ensures that a balanced and comprehensive approach is taken to retail development in the Mid-West region, taking into consideration external influences and other economic sectors. The following are some of the key policy documents relevant to the development of a Retail Strategy for Limerick:

Table 2.1: Policy context review

National	— National Planning Framework – Project Ireland 2040 Our Plan — National Development Plan 2018-2027 — Retail Planning Guidelines (2012) — Retail Design Manual 2012 — Framework for Town Centre Renewal 2017 — Realising Our Rural Potential, Action Plan for Rural Development — Rural Regeneration and Development Fund — Urban Regeneration and Development Fund
Regional	— Southern Region Spatial and Economic Strategy 2020 — Mid-West Area Strategic Plan 2012-2030 — Retail Strategies of adjoining Local Authorities
Local	— Limerick City Development Plan 2010-2016 — Limerick County Development Plan 2010- 2016 — Southern Environs Local Area Plan 2021-2027 — Castletroy Local Area Plan 2019 - 2025 — Limerick 2030 Economic and Spatial Plan for Limerick (2014) — Clare County Council Development Plan 2017- 2023 — Shannon Municipal District Plan (Volume 3b of County Development Plan) — Shannon Town and Environs Local Area Plan 2012 - 2018 (Extended to 2022)

2.1 National Policy Context

The following section outlines the primary National policy that guides retail planning in Ireland. It includes the overarching State plans and strategies as well as retail specific guidelines. Analysis of the implications for the Mid-West region of these policies is included.

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2.1.1 National Planning Framework – Ireland 2040 Our Plan

The National Planning Framework (NPF) is a high-level strategy that will shape Ireland's growth and development up to the year 2040. Drawing upon lessons learned from the implementation of the National Spatial Strategy 2002-2022, the NPF calls for a shift from an uncoordinated "business as usual" approach to planning and provides a framework for the sustainable development of Ireland's existing settlements.

In terms of Ireland's future population, the NPF sets out a population target for the Southern Region of 340,000-380,000 additional people i.e. a population of almost 2 million by 2040. It is projected that around 225,000 additional jobs i.e. at least 880,000 in total will be required to sustain this level of population growth.

National Policy Objective 7 (NPO 7) calls for the strengthening of all levels of Ireland's urban structure, with a particular focus on the five city regions (Dublin, Limerick, Cork, Galway and Waterford), large towns (>10,000 population) and small towns (<10,000 population). While the NPF identifies the scope that exists for all large towns in Ireland, detailed growth targets for these towns are set out in the Regional Spatial and Economic Strategies (RSESs).

National Policy Objective 5 seeks to *Develop cities and towns of sufficient scale and quality to compete internationally and to be drivers of national and regional growth, investment and prosperity.*

National Policy Objective 6 aims to *Regenerate and rejuvenate cities, towns and villages of all types and scale as environmental assets, that can accommodate changing roles and functions, increased residential population and employment activity.*

2.1.2 National Development Plan 2018-2027

The overarching aim of the National Development Plan 2018 - 2027 is to act as a driver for "Ireland's long-term economic, environmental and social progress across all parts of the country over the next decade". The NDP sets out the investment priorities that will underpin the implementation of the NPF, through a total investment of approximately €116 billion. This represents a very substantial commitment of resources which will provide essential infrastructure envisaged by the 10 National Strategic Outcomes (NSO).

Limerick City will be a key investment priority, however, NSO 3 seeks to Strengthen Rural Economies and Communities and is underpinned by Strategic Investment Priority 3 (SIP) which will support regional towns in the Mid-West Region. The high level of capital spending will strengthen regional development.

2.1.3 Our Rural Future: Rural Development Policy 2021-2025

Realising Our Rural Potential, Action Plan for Rural Development was published in November 2018 with the primary aim of unlocking the potential of rural Ireland through a framework of supports at national and local level. Our Rural Future builds on the progress achieved through the Action Plan and represents the government's blueprint for the post COVID recovery and development of rural Ireland to 2025. The policy is built around people, places and possibilities. It seeks to ensure that those who live in rural areas have increased opportunities for employment locally, access to public services and social networks that support a high quality of life.

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It recognises the varying typologies of rural areas and that each can have different needs, requiring different solutions depending on their local assets, their peripherality and population density. However, it is also acknowledged that there are common issues affecting rural parts of Ireland throughout the country and as such provides a range of policy interventions to help support communities in rural Ireland.

2.1.4 Retail Planning Guidelines (2012) and Retail Design Manual (2012)

The third iteration of the Retail Planning Guidelines were published in 2012 by the Department of the Environment, Community and Local Government and accompanied by the Retail Design Manual (2012).

The guidelines provide a framework for regional and Local Authorities in preparation of policies and County Development Plans, to allow Planning Authorities assess planning applications and to assist developers and retailers in formulating development proposals.

The guidelines outline five key policy objectives as follows:

— Ensure retail development is plan-led;
— Promotion of City/Town Centre vitality through a sequential approach to planning;
— Secure competitiveness in the retail sector through the enabling of quality development in suitable locations;
— Facilitate the shift towards easier access to retail via public transport, cycling and walking; and
— Delivering quality urban design.
—

One of the key tools to enable the above objectives is the requirement for the preparation of Retail Strategies to inform the Development Plans, by prescribing levels and form of additional retail floorspace and identifying a retail hierarchy. Through this, the guidelines state that applications for retail development are to be in line with the role and function of the settlements identified in the retail hierarchy.

Any proposal should also accord with the scale and type of retail development identified in the retail strategy to support the vitality and viability of these settlements. A presumption against large out-of-town retail centres is further identified. Retail Impact and Traffic Impact Assessments are also required to accompany planning applications ensuring any potential impact on existing retail and in particular the vibrancy and vitality of the Town Centre is avoided.

The guidelines state that planning applications should be assessed using the 'Sequential Test'. The overall preferred location for new retail development is within City and Town Centres. Retail development may also be appropriate within District Centres identified in the settlement hierarchy at a scale appropriate to the needs of the area.

Only where the applicant can demonstrate and the Planning Authority is satisfied, that there are no sites or potential sites within a City, Town Centre or designated District Centre should an edge-of-centre site be considered.

In addition, only in exceptional circumstances where it can be demonstrated that there are no sites, or potential sites, available either within the centre or on the edge of these centres, should an out-of-centre site be considered. Regarding classification of location

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for retail development the 2012 Retail Planning Guidelines provides clear guidance as follows:

Retail Area:

That part of a Town Centre which is primarily devoted to shopping.

Centre:

For the purposes of these guidelines, a centre refers to a City or Town Centre and can also refer to the centre of a district or Neighbourhood Centre which has been identified in the settlement hierarchy of a Development Plan.

Edge-of-Centre:

A location within easy walking distance of the primary retail area of a City Centre, Town Centre or District Centre. This distance should generally not exceed 300-400 metres. The appearance and perceived safety of the connection to edge-of-centre retail and the strength of attraction is also of relevance.

Out-of-Centre:

A location that is clearly separate from a Town Centre but within the town development boundary, as indicated in a Development Plan or Local Area Plan.

The Retail Planning Guidelines also provide a classification of the types of retail goods categories, convenience and comparison. Annex 1 defines each category as follows:

Convenience:

This category includes all supermarkets, smaller convenience stores and retail food outlets (excluding fast food takeaways, restaurants and cafes) serving food, alcoholic and non-alcoholic beverages, tobacco and non-durable household goods.

Comparison (Non-Bulky):

The list of goods which fall under this category is as follows: clothing and footwear, furniture, furnishings and household equipment (excluding non-durable household goods), medical and pharmaceutical products, therapeutic appliances and equipment, educational and recreation equipment and accessories, books, newspapers and magazines, goods for personal care, goods not elsewhere classified and bulky goods.

Comparison (Bulky):

While the bulky goods category is listed under the classification of comparison floorspace above, it is considered appropriate to make a distinction within the Retail Study between pure comparison floorspace and floorspace used for the sale of bulky goods.

The Annex 1 definition includes a (non-exhaustive) list of goods which are considered to fall within the bulky goods category as follows: Goods generally sold from retail warehouses where DIY goods or goods such as flat pack furniture are of such a size that they would normally be taken away by car and not be portable by customers travelling by foot, cycle or bus, or that a large area would be required to display them e.g. repair and maintenance materials, furniture and furnishings, carpets and other floor coverings, household appliances, tools and equipment for the house and garden, bulky nursery furniture and equipment including perambulators, bulky pet products such as kennels

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and aquariums, audio visual, photographic and information processing equipment, catalogue shops and other bulky durables for recreation and leisure.

With regard to the retailing and settlement hierarchy, the Retail Planning Guidelines advocate for the sustainable organisation of retail activity in Ireland to reflect the existing national settlement structure. Taking account of historical patterns, in addition to preceding retail planning policies, the retail hierarchy should reflect the broad tiers of urban development recognising that such a system of classification is indicative only, with scope for overlap between the specific retail functions provided in each tier.

The Guidelines provided for a Convenience retail floorspace caps (net floor space) of 3,500m² in Limerick/Shannon and - 3,000m² in the remainder of the State. These floorspace caps apply to new retail stores, or extensions to existing stores. In these mixed comparison/convenience retailing stores there is no cap on the amount of non-grocery or comparison space. The retail warehouse floorspace cap is 6,000m² gross and with specific criteria to allow for an exemption in City and Town Centre areas.

The importance of quality urban design is acknowledged in the Retail Planning Guidelines (2012). This is underlined further with the accompanying document, the Retail Design Manual (2012) which sets out key principles of urban design which might form the framework for policies to promote quality design in Development Plans and Local Area Plans. The Design Manual for Urban Roads and Streets (2013) provides additional design guidance for public spaces, seeking to achieve integrated street design within urban areas that is influenced by the type of place in which the street is located and balance the needs of all users. For retail development in the Mid-West region, given the historic street patterns and built form of the region's main towns, design is a key consideration and one which has and will continue to influence the success or otherwise of planning applications for retail developments. Integration with the existing street pattern and built form is therefore central to the ongoing vitality and viability of retail centres.

2.1.4.1 Joint or Multi-Authority Retail Strategies

The Retail Guidelines refer to the preparation of Joint Retail Strategies at Section 3.5 and set out guidelines in Annex 3. It notes certain Development Plans and Local Area Plans must be informed by joint or multi-authority retail strategies which should assess retail activity and demand needs that transcend Planning Authority boundaries.

To give these strategies statutory backing the policies and objectives of the strategy should be adopted into the Development Plan and Local Area Plan as appropriate or adopted as a variation to a Development Plan. The joint or multi-authority retail strategies for urban areas identified in the guidelines must be prepared or reviewed as appropriate to inform the relevant Development Plan review process.

It is noted that this Retail Strategy has been commissioned as a Joint Retail Strategy for Limerick and Clare County Council with respect to the Metropolitan Area. The analysis and policy recommendations set out in this strategy are based on the comprehensive review of data for both Counties Limerick and Clare. Given that the Development Plan adoption processes for the two counties are not synchronised, the Retail Strategy is being provided in separate documents with their respective plan.

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2.1.5 Framework for Town Centre Renewal (2017)

The Framework for Town Centre Renewal prepared for the Retail Consultation Forum and published in April 2017 sets out an Action Plan for Town Centre Renewal. The Retail Consultation Forum was established in May 2014 under the Action Plan for Jobs 2014 to provide a platform for structured engagement between the retail sector and relevant Government Departments. The forum is made up of a range of retail sector representatives and industry chief executives as well as public bodies including representatives from all relevant Government Departments.

The Framework for Town Centre Renewal is intended as a blueprint for towns and villages to guide their stakeholders (community organisations, businesses, residents, Local Authority, public agencies etc.) through the key stages of Town Centre renewal, including carrying out a Town Centre health check, preparing a Town Centre Plan, nominating a local business champion, adopting a place making strategy, ensuring strong occupancy and a pleasant visual appearance.

Other elements including securing financial supports for projects, optimising the potential for artisan food and craft supports, adopting a programme of events and promoting via online platforms to reach a wide audience including tourists. The above health checks and Town Centre plans would be community-driven initiatives, which aim to mobilise groups within towns to formulate their vision and action plan.

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Health Checks and Town Plans may draw heavily on the content of County Retail Strategies, however, their focus would be wider than retail alone and would examine all the stakeholders and influencing factors for Town Centres. Figure 2-1 below identifies the numerous health check indicators outlined in the Framework for Town Centre Renewal:

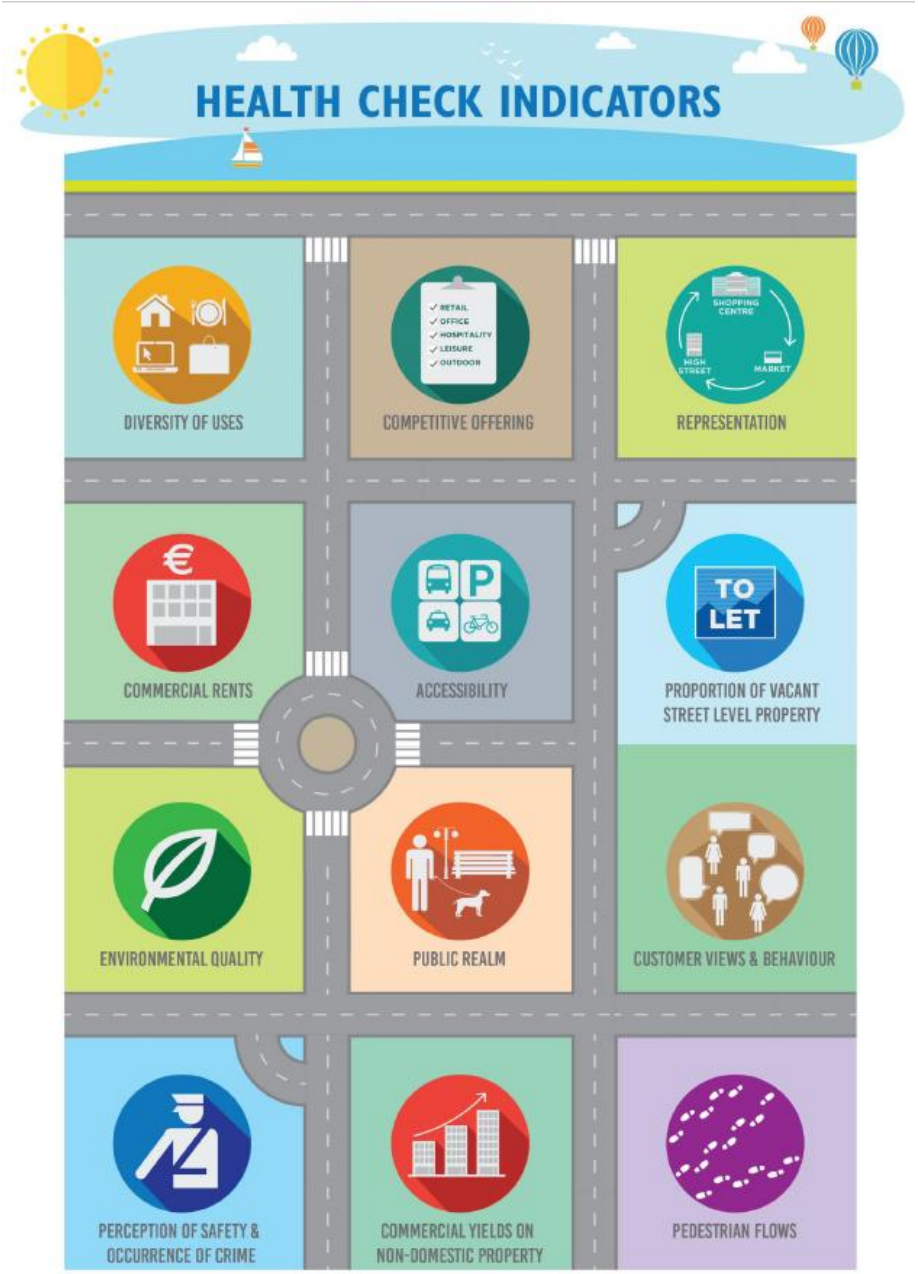


Figure 2-1: Health Check Indicators (Framework for Town Centre Renewal, DBEI 2017)

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2.1.6 Rural Regeneration and Development Fund

As part of Project Ireland 2040, the Government has committed to providing an additional €1 billion for a new Rural Regeneration and Development Fund ("the Fund") over the period 2019 to 2027. The Fund will provide investment to support rural renewal for suitable projects in towns and villages with a population of less than 10,000 and outlying areas. It will be administered by the Department of Rural and Community Development.

The fund supports the revitalisation of rural Ireland, to make a significant and sustainable impact on rural communities and to address de-population in small rural towns, villages and rural areas. It will be a key instrument to support the objectives of the National Planning Framework and in particular to achieve Strengthened Rural Economies and Communities - one of the National Strategic Outcomes of the NPF. Initial funding of €315 million is being allocated to the Fund on a phased basis over the period 2019 to 2022.

A total of €2.5m has been allocated to address dereliction and enable re-use for housing development in the core of towns and villages in rural County Limerick. Led by Limerick City and County Council, this project will prepare plans to bring derelict properties back into use, with an emphasis on the provision of housing.

2.1.7 Urban Regeneration and Development Fund

The Urban Regeneration and Development Fund (URDF) has been established to support more compact and sustainable development, through the regeneration and rejuvenation of Ireland's five cities and other large towns, in line with the objectives of the National Planning Framework and National Development Plan. Through the scheme, €2 billion worth of funding has been made available up to 2027, with €130 million available for 2020 and €550 million available up to 2022.

Types of projects eligible for funding include, but are not limited to the acquisition, enabling and/or development of areas, sites and buildings, relocation of uses, public amenity works, community facilities and infrastructure related to housing, economic or skills development (including enterprise and tourism), transport, services infrastructure and/or transition to a low carbon and climate resilient society, in an urban context.

Bid proposals must be co-funded and will require a minimum 25% stakeholder contribution. Bids must also demonstrate a further requirement for 100% (euro-for-euro) leveraging of committed wider private sector investment (i.e. development) arising from fund expenditure.

2.1.7.1 Funding allocation for Limerick

In March 2021, the Government announced the commitment of €116m URDF funding for Limerick. Compact growth was the focus of this round of URDF funding as a catalyst for regeneration and development. The projects the Government is funding are geared towards sustainable growth of our urban settlements, supported by jobs, houses, services and amenities, as envisaged by the National Planning Framework. The following table sets out the projects allocated funding as part of Call 2 of the URDF.

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Table 2.2 URDF funding allocations for Limerick, March 2021

World Class Waterfront €73.4m -	**The development of a world-class waterfront linking the Opera site and the proposed new UL Campus across the river to the Cleeves riverside campus and towards the docklands incorporating major improvements at Arthur's Quay, riverside flood defences, high quality public realm, a pedestrian bridge from the City to Cleeves and signature buildings.**
Cleeves Riverside Quarter	Proposal to develop a high-quality mixed-use development of scale, which will secure the long term transformational and rejuvenation of a brownfield City Centre site, which will result in focused compact City growth. This funding will be used to kick-start development on the site and to restore the protected buildings.
Pedestrian Bridges and Waterfront Infrastructure Works	This strand builds on the previously successful URDF proposal and consists of: Public realm works stretching along the quayside from the Docks along the central quays to Merchant's Quay, King John's Castle and George's Quay and returning along the north bank of the river Shannon; Proposed pedestrian bridges, one of which will cross the Shannon linking the City Centre with O'Callaghan Strand, including the new development quarter at Cleeves and a smaller bridge which will span the Abbey River; Re-alignment of the public road at Arthur's Quay and Honan's Quay to facilitate a comprehensive re-development project at Arthur's Quay.

Liveable Limerick City Centre Initiative €42.61m	**This project aims to make positive, innovative and transformational change to revitalise the centre of Limerick City and support the objective of compact growth in a holistic and strategic manner. It considers that the City Centre is a key piece of architectural and cultural heritage and the driver of economic growth for the region. Its revitalisation is identified as a transformational project in the Limerick 2030 Plan.**
Living Georgian City Programme	Renew vacant and underutilised residential and commercial buildings.

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Digital Innovation Cluster Programme	Develop an innovation campus at ENGINE within the City Centre to attract cutting edge companies and start-ups, accelerators and other related entities. This will create a dense cluster of innovators and entrepreneurs collaborating together and will include: — A Digital Collaboration centre; — An Accelerator centre for scaling up enterprises; — A Film skills academy utilising two existing vacant buildings.
Citizen Collaboration Programme	The development of a citizen observatory to support an active programme of citizen led and developed solutions to liveability issues in the City Centre. The Living Limerick City Centre Public Life Strategic Framework - A review and update of the Limerick 2030 strategy that will align strategies that address the complex needs of the City Centre. City Animation Partnerships - the implementation of a number of strategies and projects to support the social, economic and cultural viability of the City Centre.

The €116.01 million in approved funding is in addition to €9.68 million in approved URDF funding for seven 'Call 1' projects: 'O'Connell Street'; 'Digital Collaboration and Virtual Reality Centre'; 'World Class Waterfront'; 'Social and Economic Model'; 'Living Georgian City Programme'; 'Opera Project (Site enabling)'; 'Digital District (Inner City Digital Hub)'. The Total URDF funding approved to date stands at €125.70 million.

2.2 Regional Policy Context

The following section outlines the regional policies, which guide retail planning in Ireland. It includes the overarching regional plans and strategies as well as setting the regional settlement hierarchy including a classification of settlement in County Limerick. Analysis is included of the implications of these policies for retail planning in County Limerick.

2.2.1 Regional Spatial and Economic Strategy for the Southern Region

The Regional Spatial and Economic Strategy (RSES) for the Southern Region is a high-level document with the overarching aim of supporting the implementation of the NPF. It provides a strategic framework through which the policies and objectives of the NPF are delivered over a twelve-year period. As such, it will address spatial and economic issues around population growth, housing, employment, industrial and commercial development, retail development and the identification of regional strengths and opportunities for growth.

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The RSES promotes a co-ordinated, co-operative and collaborative approach between each of the Cities and Key Towns within the region through the establishment of Metropolitan Area Strategic Plans (MASPs) for Cork, Limerick-Shannon and Waterford Metropolitan Areas and the identification of several Key Towns.

The central key objectives are to support the "Town Centre" first approach in the context of the retail hierarchy and to promote the vitality and viability of existing centres by focusing development in them and encouraging a wide range of services, in a good environment which is accessible to all.

The Limerick-Shannon MASP seeks to support industrial, commercial and residential development and the maintenance and development of its public infrastructure and education services. The RSES identifies Limerick City as the largest urban centre in Ireland's Mid-West and the country's third largest city. Limerick Shannon MASP Policy Objective 2 seeks to:

b) Enhance the City Centre as the primary commercial area, supporting a range of retail, tourism, social and cultural activities.
c) Strengthen the consolidation and regeneration of Limerick City Centre to drive its role as a vibrant living, retailing and working City, the economic, social and cultural heart of the Limerick Shannon Metropolitan Area and Region.

It is an objective to reposition Limerick City Centre at the top of the retail hierarchy, by improving the range and quality of shopping on offer and enhancing the customer experience of visiting the City Centre. Having regard to significant growth in on-line sales, retail should be at the centre of any digital strategies developed by Local Authorities. A City or Town Centre should attract consumers by offering a unique retail experience and to evolve in line with data about shopping preferences and behaviour. The MASP supports funding mechanisms to support traditional retailers in the transition to technology led, experiential retail models. Limerick Shannon MASP Policy Objective 17 notes that:

a) Within one year of the adoption of the RSES/ MASP a Joint Retail Strategy shall be commenced for the Limerick Shannon Metropolitan Area in accordance with the Retail Planning Guidelines. The Joint Retail Strategy shall include – inter alia the defined area of the Core City Shopping Area, the location of Suburban or District Shopping Centres, a map to indicate sustainable travel routes to/from each shopping area.
b) It is an objective to support Limerick City Centre in maintaining its dominant retail function in the Mid-West hierarchy. The RSES supports and promotes the continued expansion and enhancement of retail development within the City Centre.
c) It is an objective to protect and enhance customer experience of visiting Limerick City Centre through facilitating a mixed expansion of services including high order comparison retailing in conjunction with service, cultural and entertainment facilities through appropriate and sensitive redevelopment and infill development.
d) It is an objective to develop a distinct shopping character to increase Shannon's attraction and to complement the retail function of Limerick City Centre.

Newcastle West is classified as a Key Town within the RSES, noted as being strategically located on the Shannon Estuary, adjacent to North Kerry and North West Cork, this

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designation presents opportunities for future economic development and employment growth. The town is supported by RPO 22:

a) To support and promote the role of Newcastle West as a strategically located urban centre of significant influence in a sub-regional context. In particular, it is an objective to promote the opportunity for interregional collaborations across county boundaries with Abbeyfeale, Listowel and Rathkeale and locations identified in the Strategic Integrated Framework Plan for the Shannon Estuary, which offer collective strengths and potential for project partnerships to drive sustainable economic growth in the West Limerick/North Kerry area.
b) To support the initiatives of the Atlantic Economic Corridor to realise the full potential of the Newcastle West enterprise assets to support job creation, improve competitiveness, attract investment and create future economic growth.
c) To support the delivery of the infrastructural requirements identified for Newcastle West subject to the outcome of the planning process and environmental assessments.
d) To support and promote the tourism potential of Newcastle West's historical heritage to facilitate the expansion of the existing tourism offer and to develop connectivity to and synergies with Newcastle West and the Great Southern Greenway.
e) To support the identification of opportunities for investment in incubation and innovation infrastructure for ICT and related companies and capitalise on Newcastle West's ability to accommodate remote working, enterprise start-ups and up scaling companies.

2.2.2 Mid-West Area Strategic Plan 2012-2030

The Mid-West Area Strategic Plan (MWASP) 2012-2030 will guide the physical and spatial development of the region to 2030. The overall aim of the strategic plan is to,

"provide a framework to help guide decision making with regard to the physical and spatial development of the Region to 2030 and to promote balanced growth throughout the region to achieve the maximum social, economic, health and cultural benefits for all its citizens".

The spatial strategy has a focus of strengthening the Limerick Metropolitan Area, in particular the City Centre. The MWASP acknowledges the Retail Strategy for The Mid-West Region 2010-2016. The Retail Strategy highlights that Limerick City Centre has fallen behind other cities in the State and no longer performs to its Tier 1 Status in the shopping hierarchy. The Strategy highlights that if the redundancy of the City Centre as a retail destination continues, it will accelerate the broader deterioration of the City where it may never regain its premier position in the region. The Strategy finds that too much trade has been lost to suburban locations. Limerick City Centre is in urgent need of comprehensive retail development that will prevent further erosion of its retail position and stimulate the wider regeneration of the City. The Strategy seeks to re-establish Limerick City Centre at the top of the regional hierarchy as the preferred location for new retail development in the Limerick Metropolitan Area.

The plan notes that a recent trend has been for consumers to visit other retail areas on the outskirts of the City, which has had a major negative impact on the City Centre. The issue of declining retail in the City Centre needs to be addressed in order to improve the

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image and create a vibrant sustainable City. A key priority of the plan is to address issues related to Limerick City, in particular, the perceived image of the City, decrease in population and vacant retail floor space.

2.2.3 The Retail Strategy for the Mid-West Region 2010-2016

The Retail Strategy for the Mid-West Region 2010-2016 will be replaced by this Retail Strategy covering the Limerick Shannon Metropolitan Area and County Limerick. It is notable that it was prepared in 2009 at the start of the recession years during a period of significant economic decline and credit restrictions for public and private sectors.

It sought to provide a regional framework for the formulation of the policies and strategy in the Development Plans and sought to ensure a balance between the different settlements in the region with regard to development, population and services.

The strategy highlighted that due to the sudden downturn in the economy, the previous Retail Strategy was over optimistic in its retail expenditure growth assumptions, overestimating population growth in the Mid-West and significantly under-estimated the growth in special forms of trading (including internet shopping).

It asserts that in practice, these floorspace need over-estimates were greatly exceeded by the quantum of new retail development actually built in the Mid-West and that since 2002, the supply of retail floorspace had doubled to c.532,000m² net. It concludes that the pace of new build combined with the economic downturn led to a huge over-supply of retail floorspace stock in the Mid-West of c.86,000m² net.

The strategy considered the contemporary retail offer in Limerick City Centre as substandard. Its share of retail floorspace in the Mid-West had fallen by more than half since 2002, as consumers increasingly visit other newer out of centre and suburban retail destinations to carry out their shopping, such as the Crescent Shopping Centre and a range of retail parks.

The strategy found that rents, sales densities and footfall in Limerick City Centre are far behind those of other major provincial City Centres such as Galway and Cork and it no longer performed to its Tier 1 status in the shopping hierarchy. It considered there was a redundancy of the City Centre retail stock, mainly due to lack of suitability, investment and over provision of retail in the suburbs. It asserted that Limerick City Centre was in urgent need of comprehensive retail development that will prevent further erosion of its retail position and stimulate wider regeneration of the City Centre as a whole.

It forecast a need in Limerick City Centre for up to 16,000m² net of additional non-bulky comparison goods floorspace by 2016 (rising to 39,000m² net at 2022). This equates to around 24,600m² gross and 60,000m² gross at 2016 and 2022 respectively.

It found that the Tier 2, Level 2 centres within the Limerick Metropolitan Area are predominantly convenience goods orientated, comprising a large supermarket supported by a more limited range of comparison goods outlets and services. While they were considered to be operating successfully and fulfilling their primary function, the Parkway and the Roxboro Centres appeared tired and in need of reinvestment.

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At Shannon, the Masterplan proposals to extend the Town Centre to the north were supported. The potential to develop a distinct shopping character to increase the town's attraction as part of a linked Gateway with Limerick City Centre was to be investigated.

General Strategy:

— The preferred location for new retail development where practicable and viable is within existing Town Centres (including District or Major Village Centres) which includes those centres identified in Tiers 1 to 4 inclusive of both.

Limerick City Centre Strategy:

— Protect and promote the City Centre's role as a National Tier 2 centre at the top of the Mid-West hierarchy and a Gateway into Western Ireland;
— Encourage the development of substantial new retail floorspace in the City Centre and extensions thereto, in order to allow the City Centre to recapture trade which it has lost to other retail schemes across Metropolitan Limerick and to reconfirm its position as the dominant retail location in the region;
— Adopt a proactive stance to help assemble sites and remove bureaucratic hurdles to facilitate retail development on complex urban sites.

Metropolitan Limerick
Dooradoyle (Crescent Shopping Centre):

— Encourage reinvestment, upgrading and limited expansion of retail floorspace within the Crescent Shopping Centre where it does not alter its role and function with respect to Limerick City Centre and the retail hierarchy;
— Allow additional floorspace for ancillary facilities such as banks and other financial services, restaurants and public houses, offices and leisure, social and community uses.

***District Centres* (Tier 2, Level 2):**

— The role and scale of the District Centres as primarily convenience shopping;
— Centres capable of supporting a main food shopping trip will be maintained;
— Reinvestment and regeneration of existing District Centres will be supported, but only provided where it does not change their role and scale;
— District Centres should remain primarily convenience goods and service centres and should not develop into primarily comparison goods retail destinations;
— District Centres should not be allowed to expand significantly above the 10,000m² size threshold set out in the Retail Planning Guidelines for Planning Authorities.

Out of Centre Development:

— In accordance with the Town Centre first approach, there is no need to allocate or approve further out of centre retail floorspace at the current time. Whilst there may be a need for further bulky comparison goods floorspace beyond 2016, this is sufficiently far off that a restrictive policy is appropriate until the Retail Strategy is next reviewed;
— Planning permission shall not be granted for the provision of any more out of centre retail floorspace;

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— New food stores, including discount stores, should not be allowed to occupy out of centre sites but should be part of existing or new centres;
— New Neighbourhood Centres and/or local corner shops will be permitted to serve new areas of housing development or to meet areas of local deficiency.

Shannon:
— Support the continuing improvement of retail facilities in Shannon Town Centre through the delivery of the adopted masterplan;
— To encourage the growth of retail floorspace so that the Town Centre can improve its quality of service to its local catchment area;
— To investigate whether it is possible to create a distinct shopping character for the Town Centre to increase its attraction to tourists particularly those using the airport and given its status as a linked Gateway.

Newcastle West:
— Support the improvement of retail facilities in Newcastle West Town Centre through the provision of modern shop units and a modest growth in floorspace;
— Maintain its mixed role and function.

2.2.4 County Kerry Retail Strategy 2015-2021

The Kerry County Retail Strategy 2015-2021 notes that retail trade has declined in the county. Retail and shopping were once the heart of urban cores but the recent reduced demand for certain retailing has had a serious impact on their physical and social fabric, with online shopping and out of town retail centres impacting Town Centres. Tralee and Killarney sit at the top of the retail hierarchy and are classed as hub towns.

The Strategy aims to ensure that an appropriate range and quality of retail is provided in County Kerry, to ensure that trade is not drawn to regionally competing centres, most notably Limerick City and Cork City. It notes these centres offer a good range of retail facilities and generally have an attractive setting and that Cork City has developed attractive retail areas such as the Patrick Street as well as Princes Street, Oliver Plunkett Street and North Main Street.

2.2.5 Cork City Retail Strategy 2015-2021

The Cork City Retail Strategy covers the period 2015 to 2021. Cork City Centre is the principal retail centre of the South West Region and is positioned at the top of the retail hierarchy with a market share of 59.8% of comparison spend within the Metropolitan Area. The City Centre reported a notably high vacancy level of 31%. The level of vacancy is an important indicator of the health of a Town Centre and can have a detrimental impact on the visual appearance of a Town Centre. Level 2 District Centres are located in Cork City and County. The overarching Strategic Retail objectives are:

a) To maintain and strengthen the role of Cork City Centre as the primary retail centre in the South-West region;
b) To create vibrant mixed-use District Centres within the suburbs;
c) To provide good quality and accessible convenience goods shopping to all residents of the City.

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One of the key requirements of the retail strategy is to provide a broad assessment of the additional retail floorspace required over the lifetime of their strategy. The quantum of additional retail floorspace calculated for Cork Metropolitan Area covering the 2015-2021 plan period is further identified as 43,173m² of additional convenience floorspace, 104,439m² of additional comparison floorspace and 57,555m² bulky goods floorspace by 2021.

2.2.6 North Tipperary County Retail Strategy 2010

The North Tipperary County Development Plan 2010 has the core aim 'To promote strong, competitive retail centres in accordance with the settlement and retail hierarchy of the county and to enhance and revitalise Town Centres as vibrant and viable place in which to live, work and visit'. The Council recognises the functions of Town Centres have been challenged and influenced by social and economic changes including out of town shopping centres, on-line shopping/banking etc., increased customer mobility and reduced disposable income.

The Strategy aims to ensure that an appropriate range and quality of retail is provided so that trade is not drawn to Limerick, Cork and Waterford. The county retail hierarchy forms the basis for the determination of the appropriate quantum and location of new retail development in the county in line with the county settlement strategy. Clonmel is classed as a Regional Town and sits at the top of the retail hierarchy. The town performs an important convenience and comparison role in the county beyond its immediate catchment. It provides high quality comparison and convenience retail choice in the town, with a dedicated shopping centre and retail warehouse parks. Nenagh and Thurles are identified as Sub Regional Towns. These towns have an important sub-regional role with a good range of convenience and comparison offer. They service a large rural catchment and are not expected to compete directly with each other, or with Clonmel. Both towns have strong established central areas and their strengthening and environmental improvement is a priority.

District towns in Tipperary consist of Carrick on Suir, Roscrea, Tipperary, Cashel, Cahir and Templemore. These towns have important sub-county roles, with good choice in convenience and comparison retail offer. Existing vacancy has been identified in dedicated retail warehouse parks and some shopping centres. There are established central areas with varying levels of retail vacancy and the strengthening of and environmental improvement of these will be a priority.

2.2.7 Galway City Retail Strategy 2017-2023

Galway City Centre is positioned at the top of the retail hierarchy as the principle retail area within the County. It has a substantial catchment area that extends out to the County and the wider regional area. Galway City Centre is followed by the County Towns of Tuam, Loughrea and Ballinasloe in the hierarchy. The importance of the three main towns in the county ensure that these are given highest level of importance, which when expressed in terms of the joint assessment are at level 2. This accords with Objective R2 in the County Development Plan in relation to the retail hierarchy for which there is an objective to "Retain and further develop the higher order shopping functions in Tuam, Ballinasloe and Loughrea as the main retailing centres in the County".

A study was done on total net floorspace between 2011 and 2015. Within this timeframe there was a marginal decrease in the overall retail floorspace from 164,807m² to

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162,259m². Convenience retailing is the only area experiencing significant growth, with both comparison and bulky retailing decreasing. The quantum of additional retail floorspace required for Galway between 2017-2023 is 59,640m². 12,156m² additional convenience floorspace, 31,634m² comparison floorspace and 15,850m² bulky floorspace.

2.3 Local Policy Context

The following section outlines the primary local policy that guides retail planning for the Mid-West region. It includes a brief analysis of the current Local Area Plans and their environs as they relate to retail. Furthermore, a review of the Limerick Local Economic and Community Plan is also provided.

It is important to note that when adopted the Limerick Development Plan 2022-2028 will supersede each of the existing Local Area Plans and that the preparation of any new Local Area Plans will be required to be in accordance with the Development Plan, which will act as the parent document for such plans. New Local Area Plans will also need to be cognisant and respond to the strategic requirements and principles of the RSES for the Southern Region.

2.3.1 County Limerick

2.3.1.1 Limerick City Development Plan 2010 – 2016 (extended)

The Limerick City Development Plan sets out an overall strategy for the proper planning and sustainable development of Limerick City. The vision of the Plan was for Limerick City to continue to grow as the centre of economic, social and cultural development for the Mid-West Region. The Limerick City Retail Strategy was developed in conjunction with the Limerick City Development Plan and forms Chapter 5 of the Development Plan. The strategy sets out the retail hierarchy in Limerick, elaborating on each centre's role within it and offers advice on the quantum, scale and type of retail developments required in the City. It identifies strategies and recommendations to encourage and preserve, where necessary, retail in the City.

It noted that rents and footfall in the City Centre were lower than other cities and highlighted the following concerns:

> *If redundancy of the City Centre retail stock continues, mainly due to lack of suitability, investment and over provision of retail in the suburbs, it will weaken the overall retail mix, diversity and depth of the retail offer. This will accelerate the deterioration until it reaches the 'tipping point'. The result could be that City Centre shopping implodes on itself as a retail centre of excellence and it could take many years to recover, perhaps never regaining its premier position in the regional hierarchy and resulting in potential investment migrating to other gateway locations.*

It considered that the Region as a whole already has sufficient floor space, fuelled by a doubling of retail floor space supply over the previous seven years and exacerbated by a severe economic downturn in the years following the 2008 recession. Furthermore, the distribution of new retail floor space was highlighted as uneven across the region and in particular the City Centre had seen its relative strength undermined.

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The retail hierarchy for the Mid-West region positions Limerick City Centre at the top in Tier 1, followed by Ennis, Shannon and Newcastle West in Tier 2. While Limerick City Centre is at the top of the hierarchy, compared to other provincial cities – in particular, Galway and Cork - the retail offer is substandard. It is a key aim to ensure that Limerick City Centre is the primary retail area within the Mid-West region. The following policies are noted:

Policy R3:

It is the policy of Limerick City Council to ensure that Limerick City Centre remains as the primary retail location within the Mid-West Region. In this regard, the City Council will require all of the City Centre large retail proposals to demonstrate that they will not impact negatively on the vitality and viability of the City Centre by means of a sequential test.

Policy R4:

It is the policy of Limerick City Council to facilitate a major retail development within the City Centre. In order to allow the City Centre to recapture trade which it has lost to other retail schemes across Metropolitan Limerick and to reconfirm its position as the dominant retail location in the region.

Policy R6:
It is the policy of Limerick City Council to adopt a proactive stance to help assemble sites to facilitate development on complex urban sites.

The District Centres identified as Tier 3 centres are currently predominantly convenience. It is considered that these centres should be allowed to renew themselves. However, District Centres should not develop into primary comparison goods retail destinations and should not be allowed to extend significantly above 10,000m². In respect of Roxboro, an extension may be considered in the context of the regeneration project, subject to the application of the sequential test to establish the potential impacts on the City Centre.

Policy R7:
It is the policy of Limerick City Council to facilitate the limited extension of the Roxboro Shopping centre in the context of the approved Limerick Regeneration Framework Implementation Plan for the regeneration of the South Hill and Ballinacurra Weston Areas subject to a sequential test.

Within the City there are a number of small local parades of shops with limited car parking. These centres primarily meet local need and as such play a vital role in the development of sustainable neighbourhoods. Local and corner shops meet the daily needs of local people. These facilities largely consist of stand-alone units or are linked to other uses i.e. petrol stations. These facilities shall be supported where they do not impact negatively on the amenities of local residential properties. Proposals for new local or neighbourhood shops shall be requested to demonstrate the need for such facilities in the area that it is proposed.

Policy R8:
It is the policy of Limerick City Council to support the provision of modern convenience goods stores of an appropriate scale and associated retail and service units to enable these centres to meet the day to day needs of their local catchment population.

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Having regard to the current economic climate and the rapid pace of change it will be necessary to review the assumptions upon which the strategy is based i.e. population, income and expenditure, changes in floor space, vitality and viability indicators, shopping patterns and health checks of Town Centres on a regular basis and to amend the strategy accordingly.

2.3.1.2 Limerick County Development Plan 2010 – 2016 (extended)

The County Limerick Development Plan sets out a vision statement that the Council will adopt a sustainable and balanced approach to development thereby enhancing the lives of people who live in, work in and visit the County, whilst protecting the natural and built environment. The retail market assessment noted that at the time, there was an oversupply of retail floorspace provision in the region. The plan encouraged investment, upgrading and limited expansion of retail floorspace within the Crescent Shopping Centre, so as not to alter its role and function with respect to Limerick City Centre and the retail hierarchy. It was policy of the Council to support retail facilities in the towns of Newcastle West, Abbeyfeale, Adare, Kilmallock and Rathkeale. Out of centre locations were not permitted additional retail floorspace, in efforts to consolidate existing retail centres.

The following policies in respect of the retail hierarchy are noted:

Limerick Metropolitan Area (Tier 1)

Policy ED 12:

The Council endorses the Retail Strategy for Limerick City Centre to:

a) Protect and promote the City Centre's role as a National Tier 2 centre at the top of the Mid-West Hierarchy and a Gateway into western Ireland;

b) Encourage the development of substantial new retail floorspace in the City Centre and extensions thereto, in order to allow the City Centre to recapture trade it has lost to other retail schemes across Metropolitan Limerick and to reconfirm its position as the dominant retail location in the region;

c) Adopt a pro-active stance to help assemble sites and remove bureaucratic hurdles to facilitate retail development on complex urban sites.

Policy ED 13:

It is the policy of the Council to implement the strategy for those parts of the Metropolitan Area of Limerick that fall within the county and as follows:

1) In relation to Dooradoyle (Crescent Shopping Centre): a) It is the policy of the Council to encourage reinvestment, upgrading and limited expansion of retail floorspace within the Crescent Shopping Centre, where it does not alter its role and function with respect to Limerick City Centre and the retail hierarchy; b) Allow additional floorspace for ancillary facilities such as banks and other financial services, restaurants and public houses, offices and leisure, social and community uses.
2) In relation to District Centres in the Limerick Metropolitan Area: a) To maintain the role and scale of the District Centres as primarily convenience shopping centres capable of supporting a main food shopping trip; b) To support reinvestment and

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regeneration of existing District Centres on the provision that it does not change their role and scale; c) To ensure District Centres remain as primarily convenience goods and service centres and not to develop into primarily comparison goods retail destinations; d) Not to allow them to expand significantly above the 10,000m² threshold set out in the Retail Planning Guidelines for Planning Authorities.

3) In relation to Out of Centre locations: a) Not to permit any more retail floorspace; b) Not to permit any new food stores, including discount stores. They should be part of existing or new centres; c) To consider new Neighbourhood Centre and/or local shops where they would serve new areas of housing development or to meet areas of deficiency.

Major Town Centres and Town Centres (Tiers 2 and 3, Levels 1 and 2)

Policy ED 14:

Major Town Centres and Town Centres: It is the policy of Limerick County Council, in relation to Major Town Centres and Town Centres outside of the Metropolitan Area of Limerick to:

1) **Major Town Centre Tier 2, Level 2 (Newcastle West):** a) Support the improvement of retail facilities in Newcastle West Town Centre through the provision of modern shop units and a modest growth in floorspace; b) Maintain its mixed use and function.
2) **Town Centre, Tier 3, Level 1 (Abbeyfeale):** a) Support the improvement of retail facilities so as to improve the service they provide to their local catchment population; b) Encourage the provision of tourism and visitor orientated retail provision to capitalise on the inherent potential in this centre.
3) **Town Centre, Tier 3, Level 2 (Adare, Kilmallock and Rathkeale):** a) Support these towns as important centres for the provision of convenience goods and retail services; b) Encourage the provision (where not already provided) of good quality convenience outlets capable of supporting a main food shopping trip in or on the edge of the Town Centre; c) Support the provision of non-bulky and bulky comparison goods outlets in the Town Centre where these are aimed at meeting the needs of the local catchment population.

Policy ED 15: Neighbourhood and Village Centres and local shops: It is the policy of Limerick County Council in relation to Neighbourhood and Village Centres and local shops to:

1) **Neighbourhood and Village Centres**: Support the provision of modern convenience goods stores, of an appropriate scale and associated retail and service units to enable these centres to meet the day to day needs of their local catchment population.
2) **Local shops:** a) Support the provision of small-scale shops to meet the day to day requirements of local people; b) Promote local shops to meet a gap in provision where this would achieve regeneration benefits.

2.3.1.3 Limerick 2030 Economic and Spatial Plan for Limerick (2014)

Limerick 2030 set a framework for public sector action and private sector investment in the City for the medium to long term. It includes an Economic Strategy to build a stronger local economy through the creation of employment and the attraction of investment and

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a Spatial Plan focussed on revitalising and redeveloping Limerick City Centre. The final element is a Marketing Plan.

The Spatial Plan seeks to ensure that the City Centre fulfils its full economic potential by becoming a desirable place in which to 'do business'. The ambition is to create a City and centre that can attract new inward business investment and encourage the formation of new local businesses by providing high quality, flexible space to meet accommodation requirements and ensuring the necessary business support structures are in place.

It states that the City Centre should be at the heart of the wider economic strategy for Limerick, developing its role as a place of creativity, culture and consumption. It is the 'shop window' for Limerick. The spatial strategy includes 8 key objectives:

1) To establish a **21st Century City Centre economy capable** of competing with other European cities and leading the wider City, Metropolitan Area and City-Region economy;

2) To reposition the City Centre as the premier regional shopping destination;

3) To establish **a unique tourism** offer that takes full advantage of the City Centre's special heritage and environmental characteristics;

4) To make the City Centre once **again a desirable place to live** by improving the quality of the housing offer in the City Centre;

5) To create a **high quality and safe urban environment** attractive to investors, employers, residents and tourists which generates a sense of pride in the City;

6) To build upon the City Centre's rich historic character by fully **capturing this rich heritage**, **protecting and enhancing** it where appropriate and complementing it with world class design for any new development;

7) To create **quality strategic gateways to the City Centre**, thereby making it a welcoming experience for visitors; and

8) To **attract and retain young people by providing learning opportunities** through the co-operation of the University of Limerick, Limerick Institute of Technology and Mary Immaculate College, in providing teaching and residential accommodation in the heart of the City Centre.

The plan states:

> *Limerick needs to get the fundamentals in place around business, shopping and living opportunities. It needs better infrastructure and public realm to make it a 'comfortable' and 'appealing' City Centre. However, to achieve its full potential it needs to embrace a series of transformational projects complemented by a programme of employment enhancing interventions addressing the shopping, business and residential markets, plus a programme of improvements to the public realm and City Centre infrastructure.*

The plan proposes 7 City Centre Transformational Projects:

1) A 'World Class' Waterfront – a renaissance of Limerick's entire Waterfront;

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2) The 'Limerick Cultural Centre' – an iconic destination building on the Waterfront;

3) 'Great streets' – a transformation of the City's three main streets – O'Connell Street, Catherine Street and Henry Street;

4) A new City Square/Plaza – to define the focal point or 'heart' of the City Centre;

5) A City Centre higher education campus - the creation of a multi-versity combining facilities from Limerick Institute of Technology, University of Limerick and Mary Immaculate College in the heart of the City Centre;

6) Renewal of the Georgian Quarter – a concentrated programme to restore the Georgian part of the City to its former glory; and

7) Colbert Station renewal – a new public transport interchange and enhanced station environment.

In terms of Retail, the strategy seeks to re-establish the City Centre at the top of the shopping hierarchy by improving the range and quality of shopping on offer, in the context of a much improved experience of visiting the City Centre as a whole.

The strategy states that this requires "radically improving the shopping experience in the prime shopping area – in the vicinity of Brown Thomas, Debenhams / Penneys, Arthur's Quay Shopping Centre and Cruises Street. This is the location that the major multiple retailers will wish to locate – the focal point of the shopping quarter. A comprehensive redevelopment project is advocated for the Arthur's Quay area, including the park and creating a new City Square. In the longer-term, the capital plan envisages the redevelopment or comprehensive refurbishment of the Cruises Street shopping street. The Plan also supports the refurbishment and expansion of the Debenhams and Penneys stores".

The strategy considers that most of the Opera Site is not in the prime shopping location, although supplementary shopping and leisure can be included at the southern end of the site as a component of a business-led mixed-use solution for this site.

2.3.1.4 Southern Environs Local Area Plan 2021-2027

The Southern Environs Local Area Plan 2021-2027 (LAP) sets out the development strategy of the Southern Environs area, located to the south of Limerick City. This LAP aims to support the retail hierarchy of the Mid-West by ensuring that retail development within the Southern Environs does not detract from retail services within Limerick City Centre. Limerick City Centre is noted at the top of the retail hierarchy through improving the range and quality of shopping on offer and creating an enhanced customer experience of visiting the City Centre.

The LAP includes The Tier 2, Level 1 Crescent Shopping Centre in Dooradoyle which functions as a significant District Centre acting as a major retail destination in the Limerick Metropolitan Area and Mid-West region.

The following policies are specifically noted:

R O2: Ensure proposals which would undermine the vitality and viability of Limerick City Centre will not be permitted. The sequential approach to retail development set out in

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the "Retail Planning – Guidelines for Planning Authorities, 2012" will be strictly enforced, in the interests of supporting the City Centre at the top of the retail hierarchy. Any retail development in the District or Local Centres or Retail Warehousing zone shall comply with the existing Joint Retail Strategy and its proposed replacement, the Limerick Shannon Metropolitan Retail Strategy when completed.

R O3: Protect and enhance the mix of services and facilities in existing District and Local Centres, which provide for the day-to-day needs of local communities, subject to compliance with the existing Joint Retail Strategy and its proposed replacement, the Limerick Shannon Metropolitan Retail Strategy, when completed.

R O4: a) Ensure the role of Local Centres is not allowed to expand to encompass a materially broader range of comparison goods than currently exists in such areas, as this could lead to further competition with the City Centre; b) In order to enable the sustainable development of the substantial greenfield area of Mungret, support and facilitate residential, office, education, tourism, cultural, arts, civic, community uses and retail development at the Mungret College Local Centre. Retail development intended to serve the needs of new/existing neighbourhoods and residential areas will be considered, subject to compliance with the existing Joint Retail Strategy and its proposed replacement, the Limerick Shannon Metropolitan Retail Strategy, when completed; c) The significant opportunities associated with the undeveloped nature of a large area of the Dooradoyle Road Local Centre is recognised. The site is therefore identified as having capacity to support and facilitate office and residential development. Retail development intended to serve the needs of new/existing neighbourhoods and residential areas will be considered, subject to compliance with the existing Joint Retail Strategy and its proposed replacement, the Limerick Shannon Metropolitan Retail Strategy, when completed.

2.3.1.5 Castletroy Local Area Plan 2019-2025

The Castletroy Local Area Plan (LAP) addresses retail and commercial development in Section 5. It notes that the proximity of Castletroy to Limerick City, allows for easy access to the retail and commercial facilities within the City Centre, but the area itself is also home to a range of neighbourhood retail centres that serve the local population and the Castletroy Town Centre, which serves the local population and a larger hinterland.

The LAP states that in recent years the retail choice in Castletroy has increased significantly.

> *"Convenience and comparison shopping is available throughout the area including retail warehousing, additional retail floorspace, as well as a number of Neighbourhood Centres which have developed in tandem with residential development. The district is well served with local shopping facilities such as banks, newsagents, pharmacies and takeaways. The University has its own banks, shops and pharmacy. The Parkway shopping centre to the west and the Childer's Road complex to the south west are also available for regional level shopping within close proximity to Castletroy residents. The retail floor space has reached its capacity in terms of the threshold set for Local Authorities by the "Retail Planning Guidelines for Planning Authorities" in Castletroy. It is considered that the retail provision in the plan meets the demands of the resident population and allows for a self-sustaining community while reducing the need to travel for everyday services."*

Objectives ED6, ED7 and ED8 in respect of Retail are highlighted as follow:

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Objective ED 6:

Neighbourhood and Village Centres and local shops:

It is an objective of Council in relation to Neighbourhood and Village Centres to:

a) Support the provision of modern convenience goods stores, of an appropriate scale and associated retail and service units to enable these centres to meet the day to day needs of their local catchment population. In the context of Limerick City and its environs the priority shall be to locate large retail developments in town and City Centre locations. Any future development in Neighbourhood Centres will be required to ensure that the Neighbourhood Centre complies with the definition of Neighbourhood Centres as set out in the Retail Planning Guidelines (2012), which is that Neighbourhood Centres "comprise a small group of shops, typically comprising newsagent, small supermarket/ general grocery store, sub-post office and other small shops of a local nature serving a small, localised catchment population".
b) Within Neighbourhood Centres the entire gross convenience shopping floor area shall not exceed 900m² in area, (600m² in area, net). The role of Neighbourhood Centres should not be allowed to expand to encompass a materially broader range of comparison goods than currently exists in such areas as this could lead to further competition with the City Centre.

Objective ED 7: Retail Development:

It is the objective of the Council to enhance the vitality and viability of Castletroy as a retail service centre and to improve the quality of the retail provision in the area by:

a) Encouraging the upgrade of existing retail outlets within the plan area;
b) Ensuring that proposals at ground floor level in retail areas within the District and Neighbourhood Centres are restricted to shopping and service activities. Storage use will not be permitted as the primary use at this location;
c) Encouraging the use of upper floors in retail premises for commercial or residential use;
d) Ensure that retail development is of a high standard or architecture design, finish and layout;
e) Encourage the retention of traditional shop fronts within the District and discourage the use of external roller shutters, internally illuminated signs and inappropriate projecting signs;
f) Ensuring adequate car parking is available for all development in accordance with Parking Standards as defined in this plan;
g) Restrict the net retail floor area in petrol stations to 100m²;
h) Improve the quality of the public realm in any proposal including hard and soft landscaping and following the recommendations of the Design Brief for the area;
i) Enhancing the physical environment of the area as a location for shopping and business through measures aimed at improving conditions for pedestrians;
j) Limit the development in the designated Neighbourhood Centre to such a scale that will not detract from the District Centres function.

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Objective ED 8: Out of Centre locations

In relation to Out of Centre locations it is an objective of the Council:

a) Not to permit any more retail floor space;
b) Not to permit any new food stores, including discount stores. They should be part of existing centres;
c) To consider new Neighbourhood Centre and/or local shops where they would serve new areas of housing development or to meet areas of deficiency, on appropriately zoned sites.

2.3.1.6 Newcastle West Local Area Plan 2014-2020 (extended until 2024)

Chapter 5 of the Newcastle West Local Area Plan discusses lands zoned for enterprise and employment, mixed use, small-scale businesses in residential areas and commercial and retail development in the town. The challenge for Newcastle West is to provide modern retail space to accommodate the needs of retailers without undermining the Town Centre. The plan emphasises the Town Centre area as the primary shopping location and encourages the upgrading and expansion of existing retail outlets and the development of new outlets within the Town Centre.

In Newcastle West there are two areas outside the Town Centre that have acquired a commercial/retail use. These are located at Gortboy on Station Road by Oak Park and on Sheahan's Road. There should be no further intensification of these uses due to the negative impact through the loss of the integrity of the Town Centre as the focus of retail and commercial activity. Any redevelopment of both areas should not undermine the Town Centre's primacy as a retail/commercial centre.

2.3.1.7 Abbeyfeale Local Area Plan 2014-2020 (Extended until 2024)

Abbeyfeale is classed as a Tier 3, Level 1 Town in the retail hierarchy. The town has over 8ha. designated for Town Centre which seeks to improve retail to enhance the Town Centre. The Great Southern Trail is part of a national designated cycling and walking route, which is in close proximity to the town which will attract tourists to the area. It is an objective of the LAP to:

a) Support the improvement of retail facilities so as to improve the service they provide to their local catchment population;
b) Encourage the provision of tourism and visitor-orientated retail provision to capitalise on the inherent potential in this centre outlet capable of supporting a main food shopping trip in or on the edge of the Town Centre.

2.3.1.8 Adare Local Area Plan 2014 – 2020 (Extended until 2024)

Within the settlement of Adare, the western part of Main Street is the main shopping area, with traditional 2-storey buildings displaying a wide variety of uses and individual styles. In order to protect the vitality and viability of the Village Centre new retail developments will generally only be permitted on land which is zoned Village Centre. Enhancing of convenience and comparison retail is a key ingredient in maintaining and enhancing the vitality of the village. Adare has potential for retail expansion by developing backland locations.

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2.3.1.9 *Rathkeale Local Area Plan 2012-2018 (Extended until 2022)*

Rathkeale has a limited range of retail services that provide for the basic needs of the town and wider catchment. There is an identified requirement for additional convenience and comparison retail floorspace to serve Rathkeale town and the surrounding hinterland. The plan notes that development at ground floor level in the core retail area will be restricted to shopping and other related uses to protect and enhance the vitality and viability of the Town Centre, to avoid 'dead frontage' on the buildings fronting onto the Main Street. The plan supports the "Town Centre" first approach and aims to promote the vitality and viability of the Town Centre.

2.3.1.10 *Kilmallock Local Area Plan 2019 – 2025*

Existing retail services in Kilmallock fall below that envisaged by the Limerick County Development Plan 2010 – 2015 (as extended). Current retail activity has a weak comparison element and proximity to other centres with greater retail choice such as Charleville, Limerick, Mitchelstown, Mallow and Cork, modern trends of e-commerce and changing retail demands were identified as key threats to the town. The Kilmallock LAP seeks to emphasise the Town Centre as the primary retail centre of the town and encourage new retail development to locate in the Town Centre by applying a sequential test in the location of such developments.

2.3.1.11 *Moyross – Limerick Regeneration Framework Implementation Plan (2013)*

Moyross is a designated District Centre in the retail hierarchy. Developed from the 2008 Master Plan for the area, the 2013 Framework Regeneration Plan identifies a District Centre at Watch House Cross. There is an emphasis on this being a mixed-use centre, serving community as well as retail needs.

2.3.2 County Clare

2.3.2.1 *Clare County Development Plan 2017 – 2023*

The Clare County Development Plan 2017-2023 has the aim of 'enhancing the quality of life for all people who live, work and visit County Clare'. The retail goal for County Clare is to create:

'viable and vibrant Town and Village Centres, that have shopping areas and markets at appropriate scales and locations and which function to serve their communities and rural hinterlands'.

Two towns within Clare County Council sit in Tier 2 of the Mid-West retail hierarchy, Ennis and Shannon. The plan sets out a range of policies to guide retail development in Ennis and Shannon. Ennis is the most significant retail urban centre in the Mid-West Region after Limerick City Centre. As the County Town of Clare, it is a traditional large town with shopping streets and public spaces containing a pleasant mix of cafes, bars, restaurants, speciality and fashion boutiques. There is an identified need for additional convenience and comparison floorspace in the Ennis area.

Under policy CDP 7.2 is the objective of the Development Plan to:

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a) To ensure that sufficient lands are appropriately zoned for retail development in the settlements of County Clare to support a level, quantum and form of retail activity that is appropriate to the position of the settlement on the Settlement Hierarchy for the County;
b) To have regard to the guidance set out in 'Retail Planning – Guidelines for Planning Authorities 2012' in the assessment of development proposals for retail development.

At Section 4.2 the County Plan notes Shannon is located approximately midway between Limerick and Ennis, between the catchment areas of the two largest shopping areas in the region. However, Shannon has many strengths as a retail destination in itself. It has a sizeable workforce and resident population and has an international airport and brand name.

The Council seeks to encourage and facilitate the enhancement of both the Town Centre retail provision and the character of its environment in Shannon, in order to improve the service to its local catchment.

It is recognised that Shannon has very little representation of 'bulky comparison goods' outlets. The provision of a distinct shopping area linked to tourism is an opportunity which should be examined. A masterplan was prepared for the redevelopment and expansion of Shannon Town Centre. The key elements of this masterplan have been incorporated into the adopted Shannon Town and Environs Local Area Plan 2012-2018.

Development Plan Objective CDP 7.5 sets out the following in respect of Shannon Town Centre:

a) To support the continuing development of retail facilities in Shannon Town Centre through the delivery of the adopted Local Area Plan;
b) To encourage the growth of retail floorspace so that the Town Centre can improve its quality of service to its local catchment area;
c) To examine the possibility of creating a distinct shopping character for the Town Centre, reflecting its Linked Gateway status and increasing its attractiveness to tourists, particularly those using the airport.

Additional Retail Floorspace in Shannon

The County Plan states there is an identified requirement for additional convenience and comparison retail floorspace to serve Shannon Town and the surrounding hinterland. The Shannon Town and Environs Local Area Plan 2012-2018 identifies preferred sites for future retail development and also indicates the nature and extent of retail floorspace that can be accommodated in future development areas.

The strategy also sets out clear guidance for retail development for Service Towns, Small Towns, Large Villages, Small Villages and the countryside, outlining the type of retail development required. The plan seeks to support the "Town Centre" first approach in order to promote the vitality and viability of existing centres. Edge-of-centre retail developments will only be permitted where the development will strongly integrate into the existing Town Centre and will not have a negative impact on the vitality and viability of the relevant Town Centre. Out-of-centre retail developments will be actively discouraged.

The plan aims to ensure that there is an adequate amount of land zoned for retail development in the settlements of County Clare to support a level, quantum and form of retail activity that is appropriate to the position of the settlement on the Settlement Hierarchy for the County.

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2.3.2.2 *Shannon Municipal District Plan (Volume 3b of County Development Plan)*

Shannon is designated as a Tier 2, Level 2 major Town Centre and sits beneath Limerick and Ennis on the hierarchy.

The plan highlights that Shannon is the second largest town in the County and is defined by a number of components: Shannon Town, Shannon Airport, Shannon Free Zone and Smithstown Industrial Estates. Shannon Town and Environs are of critical importance to the future economic development of the Mid-West Region.

The vision for Shannon is:

> *'A town where people want to live and work sustainably and visit because of its strong identity and sense of place, high amenity value and quality of life. A sustainable, low carbon town, which continues to be the regional leader for economic development and employment, maximising its strategic location, accessibility and gateway status.'*

The plan seeks to deliver a vibrant and viable Town Centre for Shannon, with a range of retail and service facilities that will attract an increased number of visitors to the town and increase retail floor space to ensure that the retail needs of Shannon's local resident community are met within Shannon Town Centre in so far as possible.

A mixed-use approach to all proposals will be encouraged throughout the Town Centre with emphasis placed on increasing the quantity and quality of retail offer, the development of a night-time economy and developing cultural and entertainment facilities for the community. Considerable emphasis will be placed on extending the retail offer (both convenience and comparison), providing additional facilities and services to encourage great social use of the Town Centre, improving the public realm and overall 'Town Centre feel' and the use of best practice in sustainable development and energy conservation.

It notes the Town Centre would benefit from a comprehensive review of vehicular and pedestrian circulation including a review of the hierarchy of access points which have a bearing on footfall and which impact on retail opportunities throughout the centre.

Retail Objectives

The town provides a range of local services meeting the day-to-day needs of its resident and catchment populations. The traditional provision along Main Street/Church Street is supplemented by another supermarket premises in the northern part of the settlement as well as a shop associated with a petrol filling station.

In accordance with the provisions of the Mid-West Regional Retail Strategy 2010-2016, the following is the objective for retail development in small towns such as Newmarket-on-Fergus:

— To support the provision of modern, good quality convenience goods stores, of an appropriate scale and associated retail and service units to enable these centres to meet the day-to-day needs of their local catchment population.

Commercial/Mixed Use

MU1 Within and Adjacent to the Town Centre:

— This site has been identified as having potential to facilitate the expansion of the existing Town Centre area and to establish a pedestrian link with the town park to the

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south. Any development of this site must have regard to the special historic or architectural conservation value of the surrounding area, with development to be carried out in a sympathetic manner.

2.3.2.3 *Shannon Town and Environs Local Area Plan 2012 - 2018 (Extended to 2022)*

Retail is addressed at Section 5 of the Shannon Town and Environs Local Area Plan. It notes that the existing Town Centre contains a number of mixed businesses and retail. Skycourt Shopping Centre provides the primary retail floor space within the town. While it serves the local population for convenience shopping, there is little to attract visitors to the town in respect of comparison goods. It notes plans for the redevelopment and expansion of the existing Skycourt shopping precinct, including the relocation of Lidl supermarket and a potential new anchor store in the future, as well as permissions for significant retail development in the area adjoining An Bothar Mór. It includes the following relevant objectives:

- To consolidate the existing core retail area through the continuing improvement of the quality and range of retail offer, aesthetic improvements, the development of a streetscape onto Bothar Mor, improved access arrangements and by facilitating a growth in retail floor space that enhances the quality of service for the surrounding areas.
- To develop a viable and vibrant Town Centre area with a distinctive and unique shopping character, achieved through a growth in retail floor space, evening uses, an improved consumer choice and range of services for the inhabitants of the Shannon Town and Environs Plan area, the local workforce and visitors to the region.
- To support and facilitate the sustainable expansion of the Town Centre to the north of Bothar Mór, ensuring that strong pedestrian linkages are provided to this area.
- In tandem with an improved retail offer, to support and facilitate increased linkages and connectivity between the Shannon Free Zone/Smithstown and the Town Centre.
- To facilitate the development of an expanded Town Centre to provide inter alia, a new street plaza, high street retail uses, restaurant/café cluster, outlet centre(s), public open spaces, small office units, cinema/theatre and a major anchor store facility/outlet or discount centre or retail mall in the northern section of the Town Centre lands.

The LAP considered that MU1, being prominently located and within easy walking distance of the Town Centre (see walking time analysis maps in Appendix A.4), may have potential to accommodate bulky goods retail warehousing. Convenience and comparison goods, including non-bulky durable goods, which are more appropriately located in the Town Centre core retail area, will not be permitted on MU1. In respect of future bulky goods retail warehousing on this site and in line with the Guidelines for Planning Authorities – Retail Planning (April 2012) floor space developed within MU1 shall not exceed 15,000m². Individual units within MU1 shall not be less than 700m² and shall not exceed 6,000m².

2.4 Retail Hierarchy

The Retail Planning Guidelines (2012) identify six broad tiers of retail hierarchical order, including Metropolitan (the five large cities), Regional, Sub-Regional, District Centres, Small Towns and Rural Areas and Local Shopping. They acknowledge that the hierarchy

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cannot be considered in an overly prescriptive manner and that there are no clearly defined cut-off points between levels of the hierarchy.

In the context of the retail hierarchy for the Mid-West, Limerick City Centre is identified as a Tier 1 City Centre, while Newcastle West is in Tier 2. Within the Limerick-Shannon Metropolitan Area there are multiple District Centres in Tier 2, Level 2 which includes Caherdavin (Jetland shopping centre), Shannon (Skycourt shopping centre), Castletroy, Parkway, Roxboro and Moyross.

The purpose of the retail hierarchy is to indicate the level and form of retailing activity appropriate to the various urban centres of the region, to enable the Council to protect each centre's overall vitality and viability, whilst allowing each centre to perform its overall function within the county's settlement hierarchy. The retail hierarchy has been developed with regard to the previous retail strategy and the settlement hierarchy.

The Retail Hierarchy is set out in Table 2.3 and Table 2.2below.

Table 2.3: Limerick City and County Retail Hierarchy

Tier	Level	Location	Status
Tier 1 - City Centre	-	Limerick City Centre	City Centre
Tier 2 - Major Town Centres	-	Newcastle West	Key Service Town
Tier 3 - Town Centres	Level 1	Abbeyfeale	Service Town
	Level 2	Adare	Service Town
		Kilmallock	Service Town
		Rathkeale	Service Town
Tier 4- Large Villages	Level 1	Castleconnell	Large Villages
		Caherconlish	Large Villages
	Level 2	Askeaton	Large Villages
Tier 5 – Local/Corner Shops	-	Smaller villages/crossroads – rural shops (post offices, creameries, public houses, filling stations, etc.)	Local/Corner Shops

As a further refinement of the hierarchy to apply specifically to areas within the Limerick-Shannon Metropolitan Area, a sub-hierarchy was created, further dividing the Limerick-Shannon Metropolitan Area into Tier 1 (Limerick City Centre) and Tier 2 (other noteworthy retail centres such as Dooradoyle and Caherdavin) as seen in Table 2.4 below.

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Table 2.4: Limerick-Shannon Metropolitan Area Retail Hierarchy

Tier	Level	Location	Status
Tier 1 - City Centre	-	Limerick City Centre	City Centre
Tier 2 - Major Town Centres	Level 1	Dooradoyle (Crescent shopping centre)	District Centre
	Level 2	Shannon (Skycourt shopping centre)	Metropolitan Town
		Caherdavin (Jetland shopping centre)	District Centre
		Castletroy	District Centre
		Parkway	District Centre
		Roxboro	District Centre
		Moyross	District Centre

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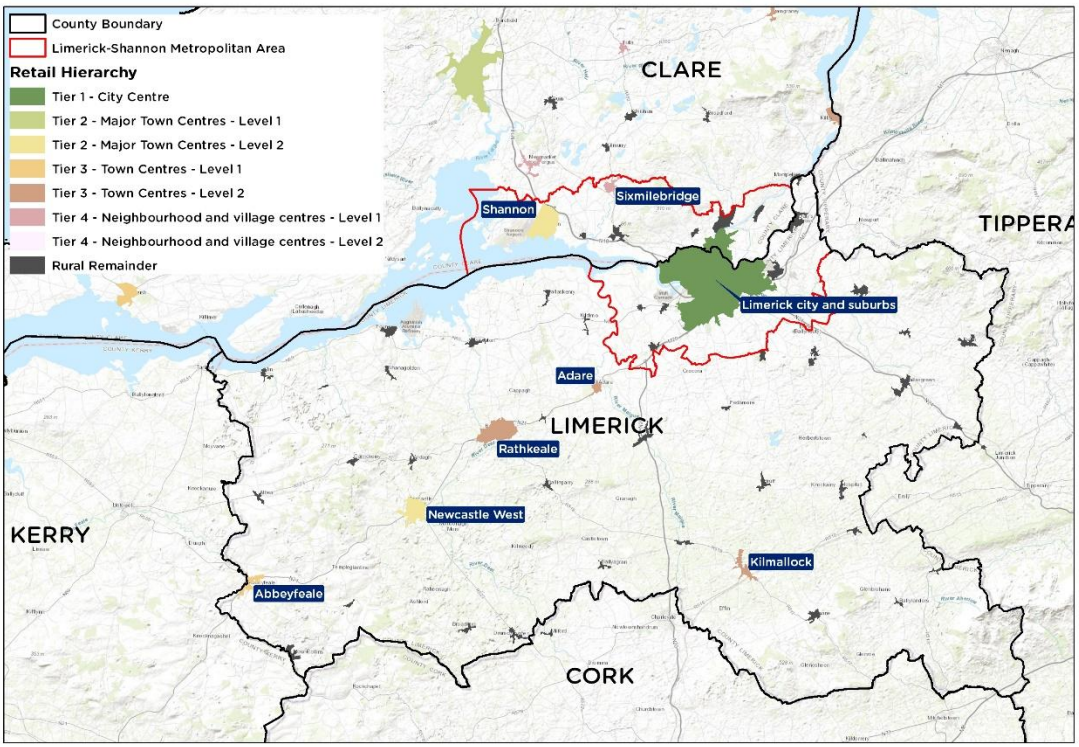


Figure 2-2: Retail Hierarchy of Towns in County Limerick and the Metropolitan Area

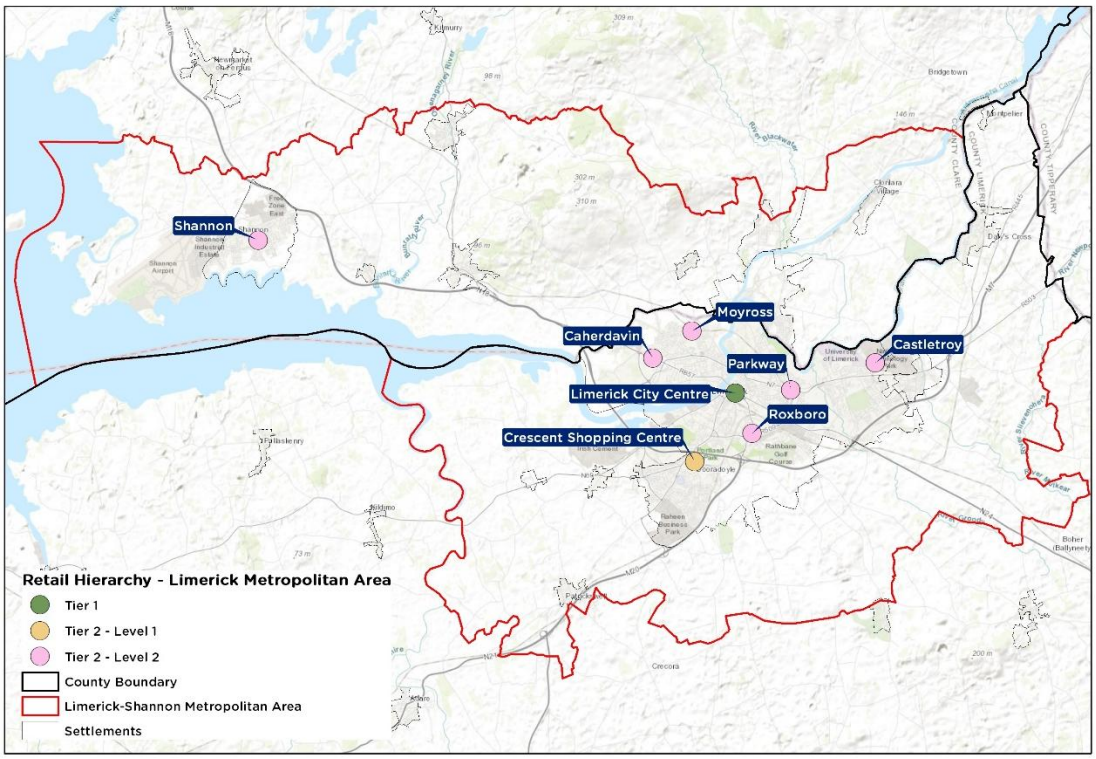


Figure 2-3: Limerick-Shannon Metropolitan Area Retail Hierarchy

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3 Retail Trends

3.1 Current Retail and Consumer Trends

This chapter provides an overview of the current retail performance and trends, wherein the national context, as well as local conditions, as they relate to the retail sector (comparison, convenience and bulky goods) are considered for County Limerick. The overview also provides some analysis of the retail sector in the Mid-West Region, its performance since the previous strategy in 2010, the factors influencing its performance and the most up to date retail trends affecting the sector. Examination of some of the key performance indicators since the previous retail strategy provides a better understanding as to how the retail sector has changed over the period since the last strategy.

The previous policy document governing retail development across the Metropolitan Area in both Counties Limerick and Clare (with the inclusion of North Tipperary) was the Retail Strategy for the Mid-West Region 2010-2016. The period in which this strategy was prepared saw a noteworthy decline not only in the regional, but in the national retail market brought on by the recession and a subsequent national economic downturn. Despite the uncertainty in the market over recent years, the retail industry has continued to grow as one of the primary drivers of the economy in Ireland. Apart from the consistent growth in value of retail sales (excl. motor trade, fuels and bars) between 2015 and 2020, the overall sector has been a key employer in Ireland, employing 13% of all working people in Ireland as of Q1 2020. The CSO recorded employment in retail services increased steadily year-on-year since 2010, when it accounted for approximately 265,000 employees, which by 2017 increased to approximately 276,000. The increase continued to 306,300 by the end of 2018 and by Q1 2020, the figure was up to 310,200, which is approximately 55,300 more employees than the combined number of employees in construction, agriculture, forestry and fishing[2].

As the worst effects of the economic recession of 2007 appeared to have subsided for many sectors, the outbreak of the coronavirus (COVID-19) has brought new challenges, leaving the global economy facing an uncertain future. Due to the precautionary measures brought on to protect public health and limit the spread of COVID-19, the impact on the Irish economy has seen a massive decline, from one of the fastest growing in the European Union (estimates from the Department of Finance[3]), to a projected decline of 10.5% in 2020, leading to growing unemployment. The effect of COVID-19 on the Irish economy is clear in the short term, it remains to be seen what the impact will be across Ireland's regions, counties, cities and towns over a prolonged period[4].

In its latest report, Consumers and the new reality[5] (June 2020), KPMG found that the global challenges in physical shopping brought on by COVID-19 will result in consumers only going to a physical shop "when the price is right, when it is convenient and when it is safe to do so". The study concluded that physical retailers will need to change their approach as results for grocery shopping indicated that 50% of consumer respondents

[2] CSO, Labour Force Survey 2020
[3] gov.ie (www.gov.ie)
[4] Regional Assemblies: COVID 19 Regional Economic Analysis, May 2020
[5] KPMG, https://home.kpmg/ie/en/home/insights/2020/08/whats-next-for-retail-Covid-19.html

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felt the change in their shopping habits would be permanent, while 45% indicated the same for non-grocery shopping.

This change in behaviour, although not entirely new as it had already been ongoing before the pandemic, has forced businesses to consider how they will reopen for trade once able to. Although there will be exceptions, for example in niche retail players and specialised and/or luxury goods, it is expected that the vast majority of retailers would need to have some form of online presence and/or delivery channel if they are likely to survive in the medium to long term. This would mean that retailers would need to move beyond a website only, but develop their capabilities of online payment, radical operational changes to inventory, merchandising and procurement and of course the critical "last mile logistics". Due to the competitiveness of the market, the recent development of convenience of online shopping and the sheer amount of options available, brands and retailers run the risk of losing customers, both in its online and offline incarnations, if they are not able to adjust to the consumer's behavioural shift toward online shopping.

KPMG's Global Retail Trends 2020[6] report also highlights other key trends apart from the need of retailers having to adopt business models that consider the importance of online shopping. The report presents findings on what consumers find most important: (1) a brand's purpose, i.e. its position on a social or political issue and; (2) whether a retailer/brand has availability of what the consumer is looking for.

Given the hardships that consumers had to face during a world pandemic, results from the study indicated that consumers want to see the notion of 'people above profit' reflected in the retail businesses they support. Consumers have expected retailers to reflect their values and to care about the same societal issues they do. It is expected that businesses will be showcasing their response to the impacts of COVID-19 and how they intend to assist society, which should result in greater brand or retailer loyalty.

Due to the growing use of online shopping, even prior to the more forced interaction therewith by COVID-19, consumers have become accustomed to having a wide range and variety of projects available at the click of a button. This has diluted customer loyalty. For retailers to survive and thrive, in this changing environment their offering will either need to be broadened to a considerable selection or narrowed to key high-demand items. It is expected that retailers will hence invest in three key areas:

1) Customer loyalty programmes, where retailers would need to improve on the usual points-based system, to incorporate a more integrated rewards system with a selection of service and product reward offerings.

2) Customer data, where retailers compile and analyse consumer spend, preference and shopping behaviour to improve value and relevance of offers to particular groups of consumers.

3) Technologies that improve the shopping experience, with retailers developing innovative ways of connecting with customers and making the shopping experience more convenient (e.g. voice ordering through smart speakers).

[6] KPMG, Global retail trends 2020 - KPMG Global (home.kpmg)

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The Consumers and the New Reality report further states that customer behaviour will increasingly be influenced by their need for self-protection. The pandemic has caused many people to think about their physical and financial security needs over the short and medium term. The following figure highlights some of the key results:



Figure 3-1: Customer Trend Overview (Source: KPMG)

As seen in Figure 3-1, customers expect to see the impact of the pandemic on 'normal life' last for more than a year and has already led to a reduction in spend and a subsequent focus on savings and longer term financial security. The precautionary measures and change in lifestyle brought on by the pandemic has also placed more emphasis on consumers at home and their apparent demand for access to retail goods and services at home. The home has thus become the new hub, with increased expenditure on improving customer's experience and perception of working and living at home.

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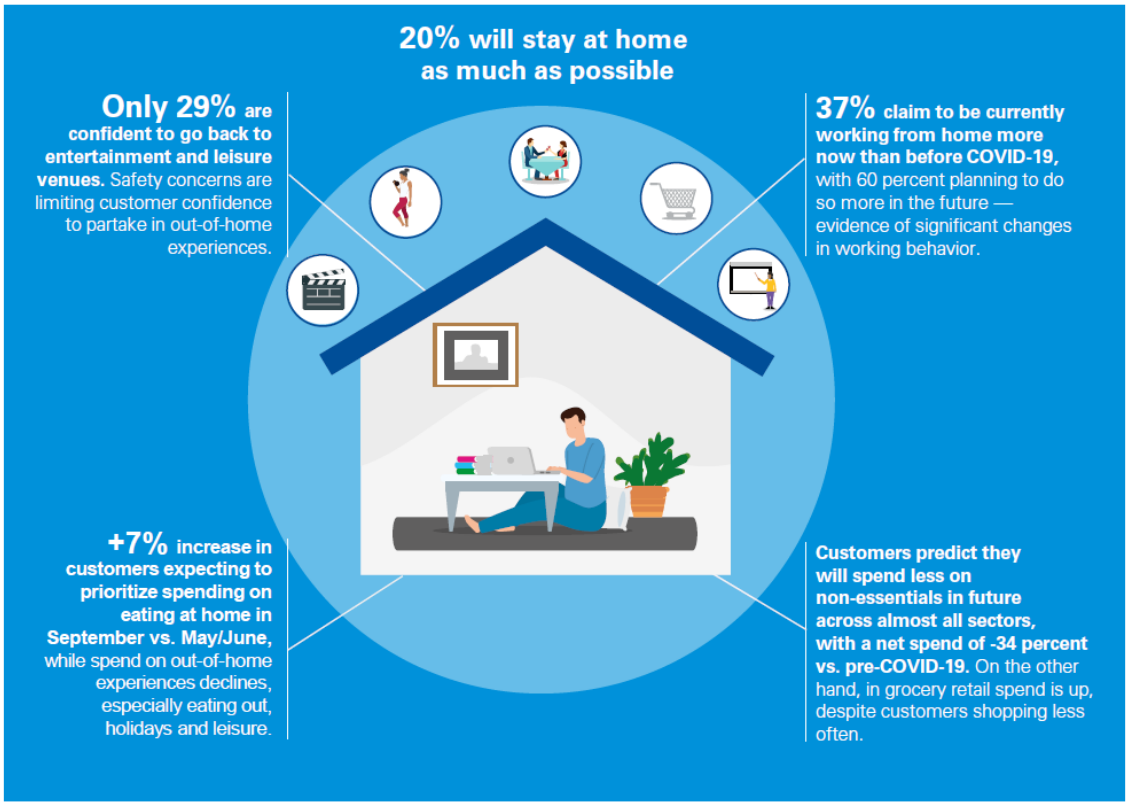


Figure 3-2: Focus on the Home (Source: KPMG)

The increased focus on the home environment has seen particular increases in shopping spend and volume on groceries (increased eating in as opposed to eating out), home and garden improvements and electrical goods/technology.

When looking at retail in different locations, various reports mention the interplay between Town Centre and suburban retail and the changing uses of these locations. In the report Town Centre Futures: Evidence and Ideas for Recovery[7], it is mentioned that the health and future of Town Centres do not solely rely on retail, but rather a mixed-use approach that is tailored to each specific area's local uses and needs. The mix of retail and other services should complement each other to form a connection between where people live, play, work and shop. The types of uses should however be informed by what the community wants and is driven by their demands for specific goods and services in certain locations. The success of these initiatives is however dependent on strong partnerships between private and public sectors and stakeholders. Community-owned spaces, which includes retail trading spaces, will increase buy-in into the revitalisation of Town Centres, empower communities to take ownership of its use and guide the direction of its development.

The Town Centre Futures: Evidence and Ideas for Recovery report provides a study into Town Centre dynamics of London as a proxy to the functioning of other Town Centres. Universal traits identified, some of which are related to COVID-19, include the following:

[7] Belcher, E. et al. (2021). Town Centre futures: Evidence and ideas for recovery. Available at: centre-for-london-town-centre-futures-hq.pdf (mkmapps.com)

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— The effect of store closures imposed by COVID-19 restrictions on the trading of 'non-essential retail has fast-tracked the move to online shopping, which is set to remain at a higher level than pre-COVID.
— Footfall across high streets and shopping centres have drastically reduced, specifically in larger Town Centres driven mostly by commercial activity. This is noted by the subsequent footfall increase in smaller neighbourhood and suburban centres as people shop and spend time closer to home. These more 'local' centres have become important for social interaction, especially where there is integration of parks or green area facilities nearby.

Similar notions of 'local' or suburban centre retail development is even seen further afield in Australia, where most retail, particularly comparison goods retail stores, have suffered huge sales decreases as a result of surging online sales and growth in localism[8].

3.2 Retail Sales Overview

Before the COVID-19 pandemic, the retail sector in Ireland benefitted from a sustained period of economic growth, with the Retail Sales Index[9] showing growth of sales in the sector of 32.2% since 2012[10]. The CSO has reported an increase in domestic retail sales since 2012, which continued from 2015 to 2019 (see Table 3.1 and Figure 3-3 below). While this is a positive indicator for the sector, it must be tempered by caution as the retail sector is highly sensitive to consumer sentiment, which is increasingly influenced by global economic shifts and geopolitics. As seen in Table 3.1 below, the onset of COVID-19 early in 2020 caused a sharp downturn in the total sales value and volume indexes for all retail business combined for the State.

Table 3.1: Retail Sales Index 2015 - 2020 Q2

Period	Value of Sales			Volume of Sales		
	Index	% change on previous period	Annual % change	Index	% change on previous period	Annual % change
2015	100.2			100.3		
2016	104.9	5	5	107.8	7.9	7.9
2017	106.5	1.5	1.5	112	3.9	3.9
2018	109.4	2.7	2.7	116.2	3.8	3.8
2019	110.5	1	1	118.6	2.1	2.1
Q1 2020	105.8	-5.7	-2.8	114.1	-5.6	-2.1
Q2 2020	83.6	-21	-24.2	92.5	-18.9	-21.7

[8] Hoods, Laura (2020, November 1). *The suburbs are the future of post-COVID retail*. The Conversation. The suburbs are the future of post-COVID retail (theconversation.com)

[9] A monthly measurement of all goods sold by retailers based on a sampling of retail stores of different types and sizes. The retail sales index is often taken as an indicator of consumer confidence.

[10] Savills, Market in Minutes, Quarter 4 2016

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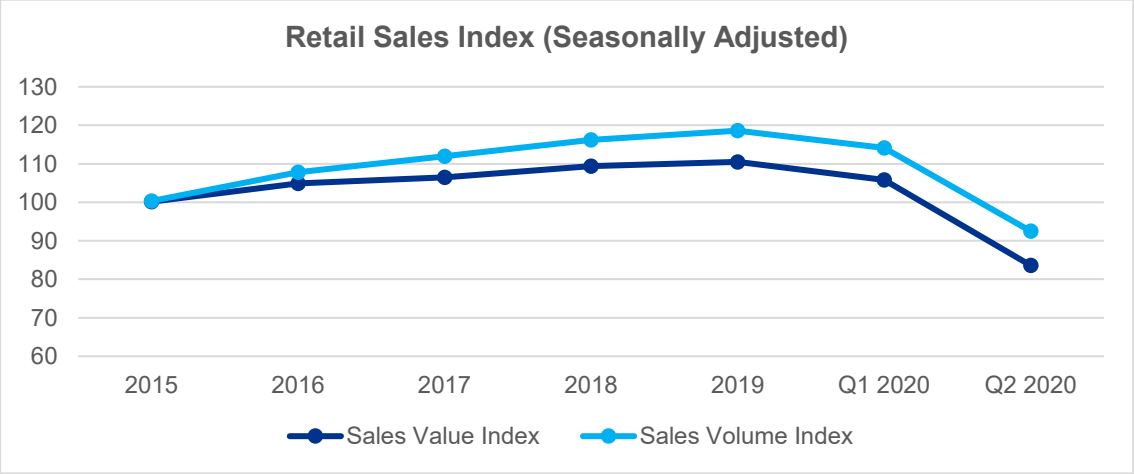


Figure 3-3: Retail Sales Index 2015 - 2020 Q2

The volume and financial value of retail sales is however strongly affected by consumer sentiment. Since the economic recovery following the recession, the recovery of the retail sector has been characterised by the 'price conscious shopper'. This is again reflected in the consumer trends (as seen in Section 3.1) where it is evident that shoppers are reluctant to spend large amounts and are very particular on what, and through which channel, they choose to spend. It is also demonstrated by a propagation in discount stores, particularly in the convenience sector, but also in the comparison sector. Together with the increased move to online shopping, this consumer trend has resulted in higher retail competition and a subsequent downward pressure on prices. This means that retailers would not necessarily benefit as much from the increase in volume, as the value sales has decreased.

Although the total value and volume for all business declined from 2019 to 2020, there was an increase in the retail sales value for retail businesses that exclude motor trade, fuel trade and bars. The following figure provides an indication of this increase.

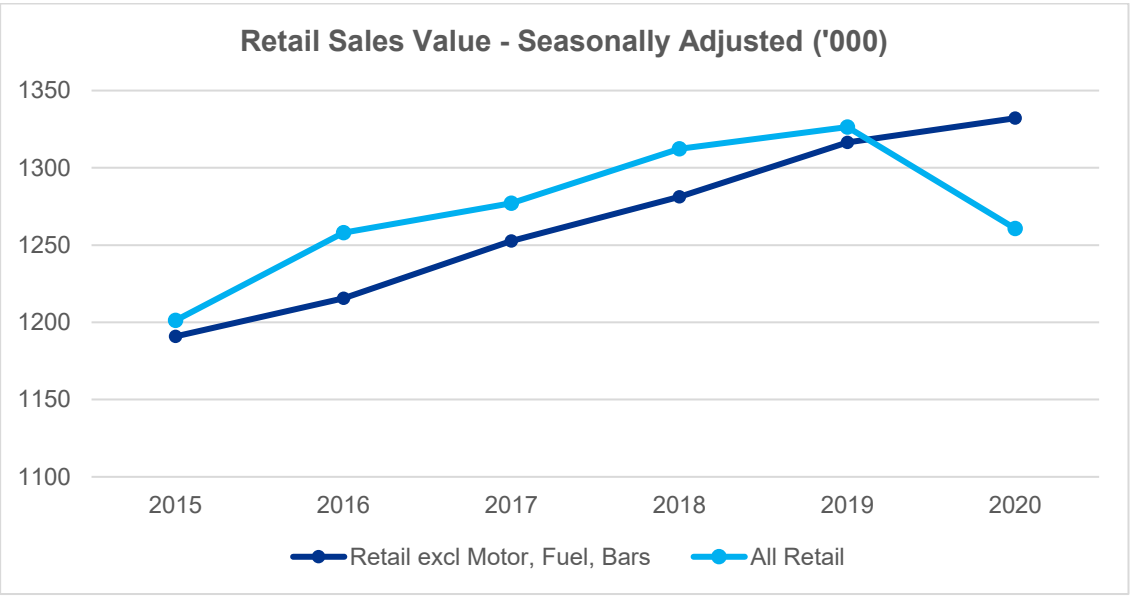


Figure 3-4: Retail Sales Values (2015 - 2020 Q2)

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3.2.1 State Retail Sales Volume Overview 2019-2020

The steady growth in sales volumes from 2015 to 2019 indicated a well performing sector, but data for 2019 and 2020 show an increasing fickleness. The following figure and description[11] provide an overview of retail sales volumes in Ireland from 2019 to 2020.

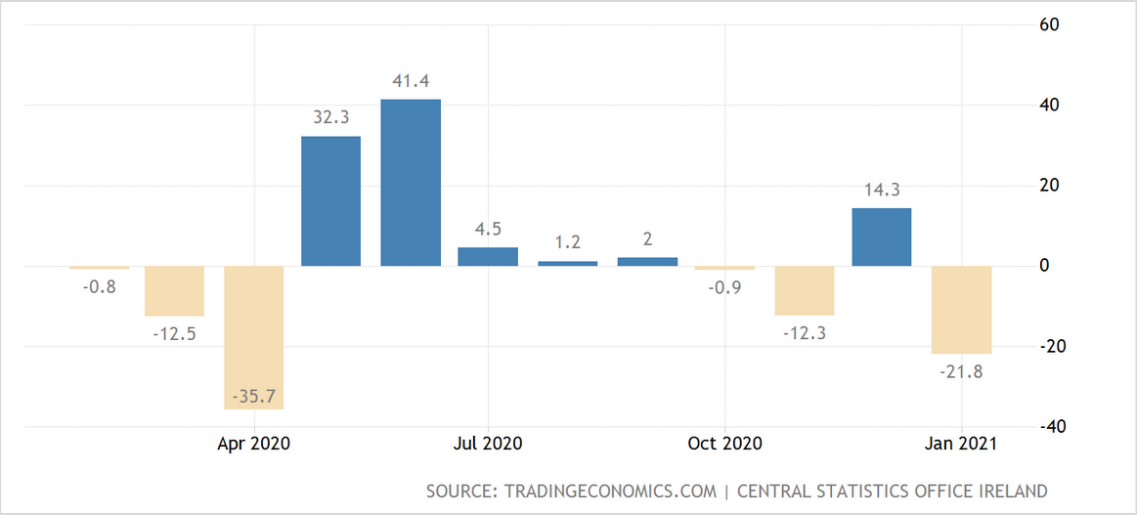


Figure 3-5: Percentage Change in Retail Sales Volumes (Feb 2020 - Jan 2021)

2019 Overview

In January 2019, the CSO reported a decrease of 1.2% in retail trade from December 2018, the largest decrease in retail trade since March 2018, with large decreases recorded in the sectors of motor trades (-2.0%) and fuel (-0.6%). The decrease came despite increases recorded for other retail sales (44.9%) and books, newspapers and stationery (4.2%). With motor trades excluded, retail sales went up 0.7%, after a 0.1% fall in the previous month. In February 2019, retail trade increased the first time in three months by 2.1% from February 2019, with a large increase in clothing, footwear and textiles (8.1%) and motor trades (7.6%). Following intermittent decreases in March and May, with increases in April and June, Irish retail fell the most it had in four years in July 2019, showing large declines in motor trades (-13%) and other retail sales (-11.5%). Smaller increases were seen in non-specialised stores (5.7%) and pharmaceuticals, medical and cosmetic articles (4.7%). Retail sales rebound in August (+5.7%) and showed steady growth up to another decline in November 2019 (-3.3%) mainly due to lower sales of pharmaceuticals, medical and cosmetic articles (-9%) and food, beverages and tobacco (-6.5%). Over the December period retail sales saw some resurgence with an increase of 3.9% with the help of an 11.6% increase in food, beverages and tobacco. Year-on-year figures showed an increase of 5.8% on December 2018.

2020 Overview

Following the increase in December 2019, retail sales in 2020 declined for four consecutive months from January to April. The decreases in March was the largest

[11] Figure and description sourced from Trading Economics (and CSO) https://tradingeconomics.com/ireland/retail-sales

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decrease in 11 years, dropping 12.7% from the month before, as the lockdown on retail due to COVID-19 precautionary measures started taking effect. Large decreases were recorded in bars (-53.1%), clothing, footwear and textiles (-49.2%), motor trades (-30.7%), books, newspapers and stationery (-29.2%) and department stores (-25.8%). In turn, there were large growth spikes in the sale of food, beverage and tobacco in specialised (17%) and non-specialised stores (14%), with further increases in hardware, paint and glass (13.3%) also showing significant increases. The sales downturn was further decreased by 35.4% in April, with further large decreases in the sale of furniture and lighting (-84.1%), bars (-77.1%), clothing, footwear and textiles (-73.6%), motor trades (-71%) and department stores (-69.7%).

After the initial COVID-induced shock, retail sales rebounded strongly from May through to September, with large increases of 32.5% and 38.4% in May and June respectively. The aforementioned categories were also the largest gainers in this five-month period, as reflected in the 296.8% increase in furniture and lighting and 284.2% increase in clothing, footwear and textiles sales recorded for the phase two lockdown relaxation in June. When lockdown restrictions tightened once more, retail sales dropped 12.8% in November, with sales in bars (-63.9%) and clothing and footwear (-50.9%) hit once more.

3.2.2 High Streets Task Force

The High Streets Task Force (www.highstreetstaskforce.org.uk) is a multi-disciplinary initiative in the UK, including inputs from bodies such as the Institute of Place Management and the Royal Town Planning Institute. The website provides an active resource for addressing challenges to City and Town Centres.

It is highlighted that both a centre's shopping provision and non-retail offer are key in attracting people into the centre (Wrigley and Lambiri, 2015). A diverse mix of non-retail opportunities in a centre is thus integral to ensuring its vitality and viability (Teller and Schnedlitz, 2012) and a lack of it can lead to customer dissatisfaction (Wrigley and Lambiri, 2015). Although independent retail remains active in many centres, the overall number of stores has been falling consistently for many years. Therefore, it is important to understand what else a centre can offer apart from retail.

From a planner's perspective, Sue Manns, President of the Royal Town Planning Institute wrote[12] in relation to COVID-19:

'The pandemic has impacted our High Streets perhaps more than other places. Even as shops begin to open again, there are fewer people, less activity and a growing number of empty premises. Although our High Streets, Town and City Centres may have been through a dark time, history has shown how they can evolve to meet the needs of the communities they serve. So we need to look at ways that we can breathe new life back into our High Streets and shopping centres, making them once again places that people want to visit; it may be that this requires a different and more diverse role and function. It will be interesting to see how the temporary changes to exempt outdoor markets, pop-up car-boot sales and summer fairs from the planning process and for pubs and restaurants to use car parks and terraces as dining and drinking areas will change these places. Will these changes introduce a new culture and mix of activity creating the spark

[12] Manns, S. The planners' response to COVID-19. *Urban Des Int* (2021).

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that is needed to bring people back to these areas? Similarly, will the temporary wider pavements that provide for social distancing and 'pop-up' cycle lanes to encourage sustainable travel become permanent features of the High Street?'.

The High Streets Task Force set out the following "New and important priorities for 2020"[13]*:*

— ***Non-Retail Offer:*** Previously, any part of a town's offer that wasn't retail was included in *diversity* – but as the non-retail offer becomes more important to many high streets then it is becomes a priority in its own right.

— **M*arkets*:** They are our oldest form of collective retailing, however, the transformation of markets into food halls and other ways in which markets are reinventing demonstrates how they are now improving the vitality and viability of many towns.

— ***Redevelopment Plans*:** Unfortunately, some Town Centre regeneration has been misguided and, after the financial crash, other plans have stalled, leading to situations of planning blight, both of which have a negative impact on Town Centres and high streets.

— **F*unctionality*:** This refers to the various purposes that towns serve. In some locations certain functions dominate but others have more of a multifunctional economy. Research has demonstrated that understanding these functions is important before visions, strategies and other interventions are planned.

— **I*nnovation*:** Successful transformation is not just dependent on traditional investment and development, it can also be kick-started by pop-up shops, festivals, events and community use of redundant retail space. The message here is that place leaders and partnerships need to be creative and experiment. Refiguring Town Centres for social distancing is part of this innovation process - with the successful interventions likely to become a more permanent feature.

[13] 25 'Vital and Viable' Priorities | High Streets Task Force

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4 Household Retail Surveys

The following chapter summarises the surveys carried out as part of this strategy. The household phone surveys (consisting of an equal split between landline and mobile phone calls) were carried out between December 2020 and February 2021. The household phone surveys were supported by an online survey of the same questionnaire, which was launched in mid-December 2020 and extended to February 2021. The survey results were collated at catchment level for all areas assessed.

4.1 Methodology

A total of 1,394 surveys were conducted, which consists of 605 household phone surveys and 789 online surveys carried out across County Limerick (incl. Limerick-Shannon Metropolitan Area and the extension of the Limerick Catchment into County Clare, as well as adjoining counties).

The surveys contained similar questions relating to where the respondents carry out their main food and grocery shopping, top up shopping, comparison shopping (clothing and footwear) and bulky goods (large household appliances and furniture) shopping. The surveys contained questions regarding the respondents' satisfaction with the location they were shopping in, along with the frequency of these types of shopping including online shopping. Respondents were also asked to provide feedback on the influence that restrictions and health and safety precautions related to the COVID-19 pandemic have had on their retail shopping habits.

4.1.1 Household Phone Survey Methodology

The locations and number of household (phone) surveys undertaken were allocated in proportion to the population (as recorded in Census 2016) of the 10 - 15 largest settlements in each catchment area. Phone surveys were carried out by using a database of landline and mobile phone numbers registered, as purchased from a third-party provider.

4.1.2 Online Survey Methodology

The online survey was intended to supplement the household phone surveys in order to strengthen response rates for questions and target respondents in the younger age cohorts. Although the questions used in the phone and online surveys were the same, the order of the online survey questionnaire was changed in order to prioritise particular questions and ensure the lowest possible survey time and subsequent highest possible response rates. The online survey questions were implemented using survey monkey and distributed using the Limerick City and County Council and Clare County Council social media and MapAlerter systems to target responses. The survey was accessible from December 2020 to end of February 2021.

4.2 Shopper Survey Results

Shopper surveys are used to collate 'on-street' respondent feedback at certain locations within the retail area being assessed. Due to the government restrictions placed on retail trade and personal movement with the aim of limiting the spread of COVID-19, shopper surveys were not conducted. It was deemed unfeasible as in-person surveying would

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breach social distancing and interaction guidelines and would not be representative of regular retail trade as shopping is limited to selected categories and consumer movement has been significantly curtailed.

4.3 Household Survey Results

The following subsections provide a summarised overview of the survey results across the Study Areas, including at County and Limerick-Shannon Metropolitan level. To ensure that survey results are analysed correctly each catchment area, a geocoding exercise was performed to assign survey results based on feedback received, to a catchment area within the County. The results were filtered for each catchment, the total of which provides a representative overview of retail and shopper activities in each.

The assignment of catchments for analysis of County and the Metropolitan Area are as follows:

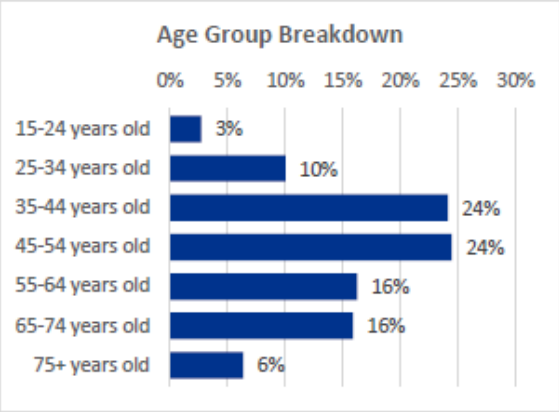
— Limerick Catchment (including the Limerick-Shannon Metropolitan Area, as well as the area of the catchment extending into County Clare);
— Newcastle West Catchment.

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4.3.1 County Limerick

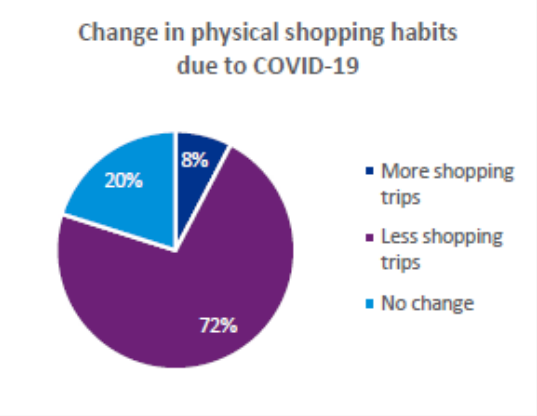
Demography

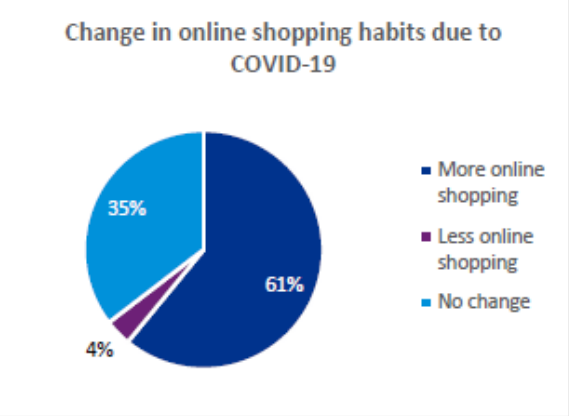


Survey Responses		
Survey Method	#	%
Phone	336	61%
Online	214	39%
County Limerick	550	

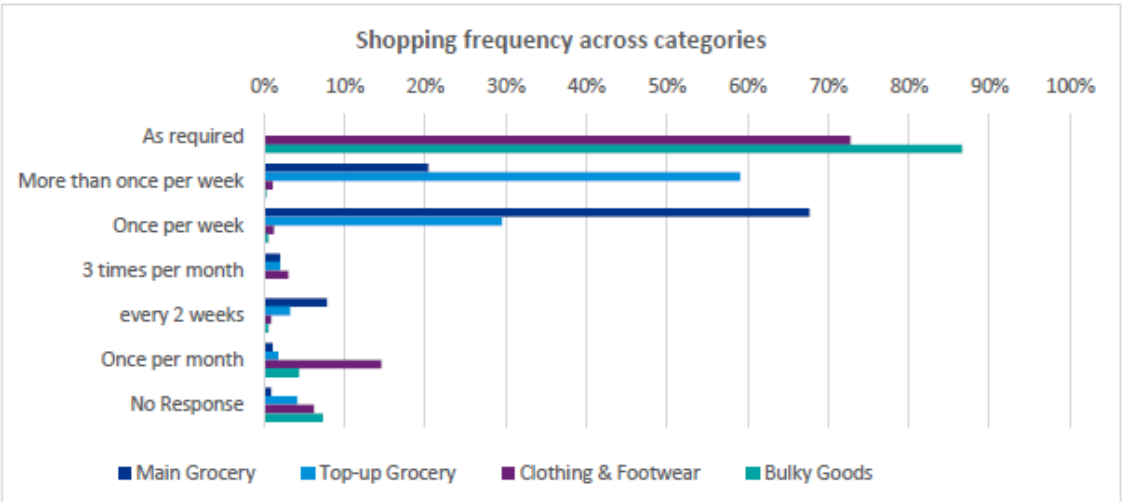
48% of the survey respondents in Limerick indicated that they are between the ages of 35 and 54. A further third of respondents were recorded in the 55-64 and 65-74 age cohorts. Since the onset of COVID-19, 72% of all respondents have been on less shopping trips (better planned trips, larger basket sizes), with 62% opting for more online shopping. 35% however indicated that they did not change their online shopping habits due to COVID-

COVID-19





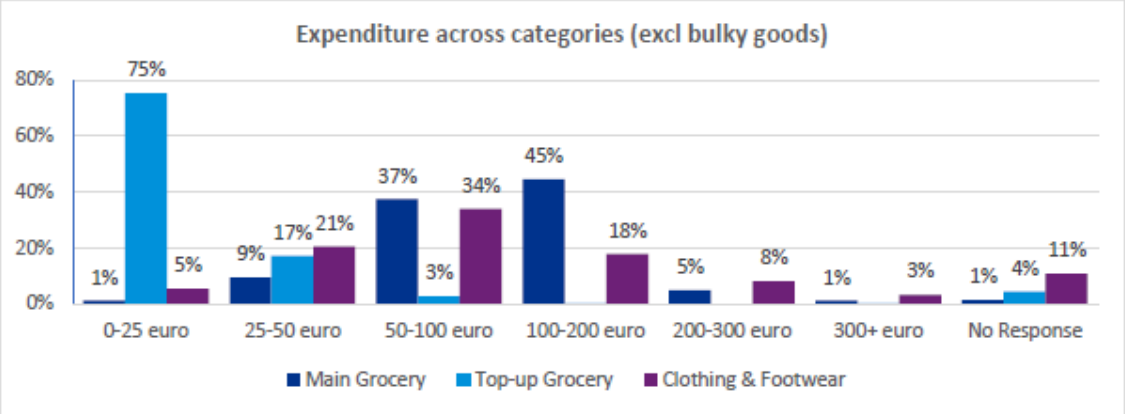
Shopping Habits

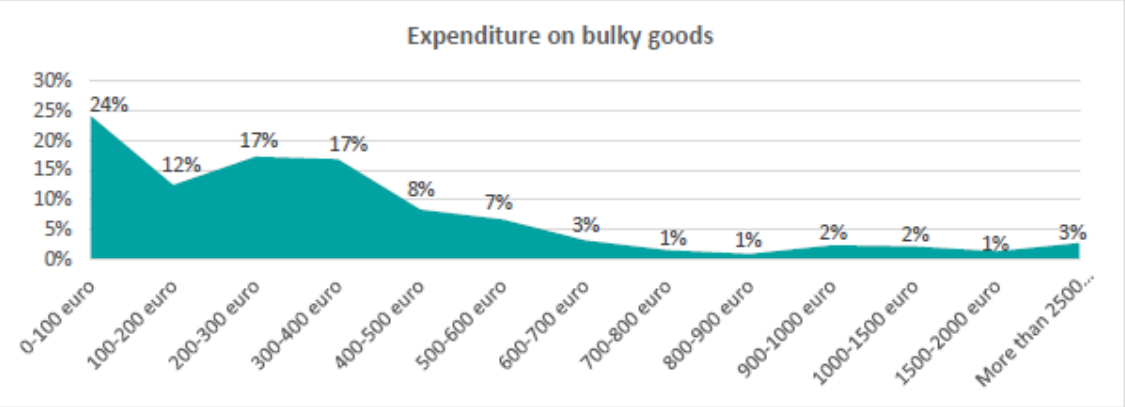


Nearly 70% of all respondents would do a weekly shop for main groceries, with an additional 20% doing so more than once a week. Shopping for clothing & footwear (73%) and bulky goods (87%) are mostly done as and when required. 59% of respondents would do top-up shopping more than once a week, with the majority (75%) of top up shopping expenditure below €25. 82% of main grocery shopping expenditure is between €50 and €200, with 45% of this in the €100-€200 bracket. The majority of expenditure on bulky goods ranges from below €100 to €400.

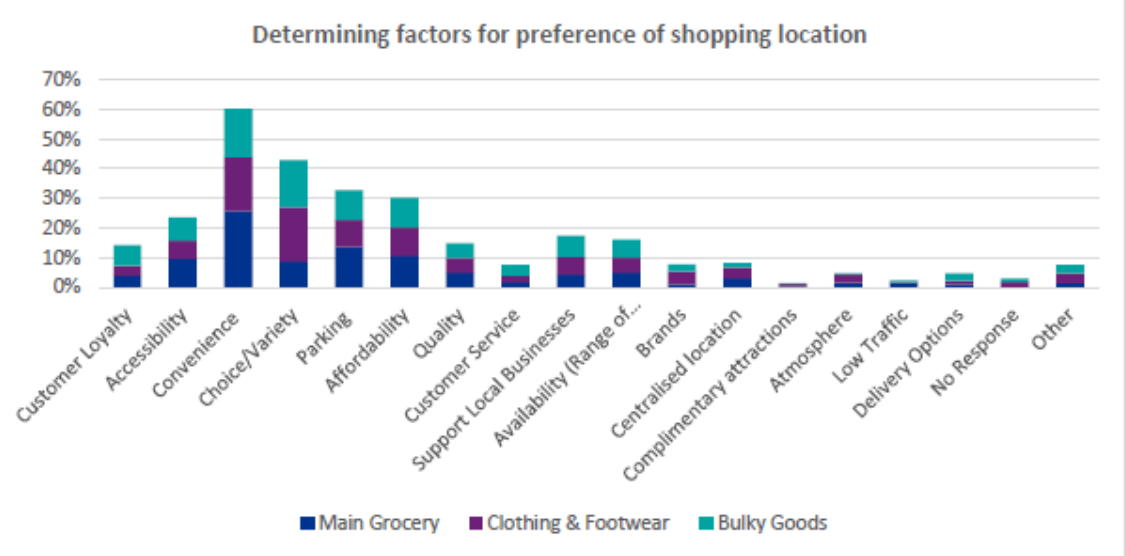
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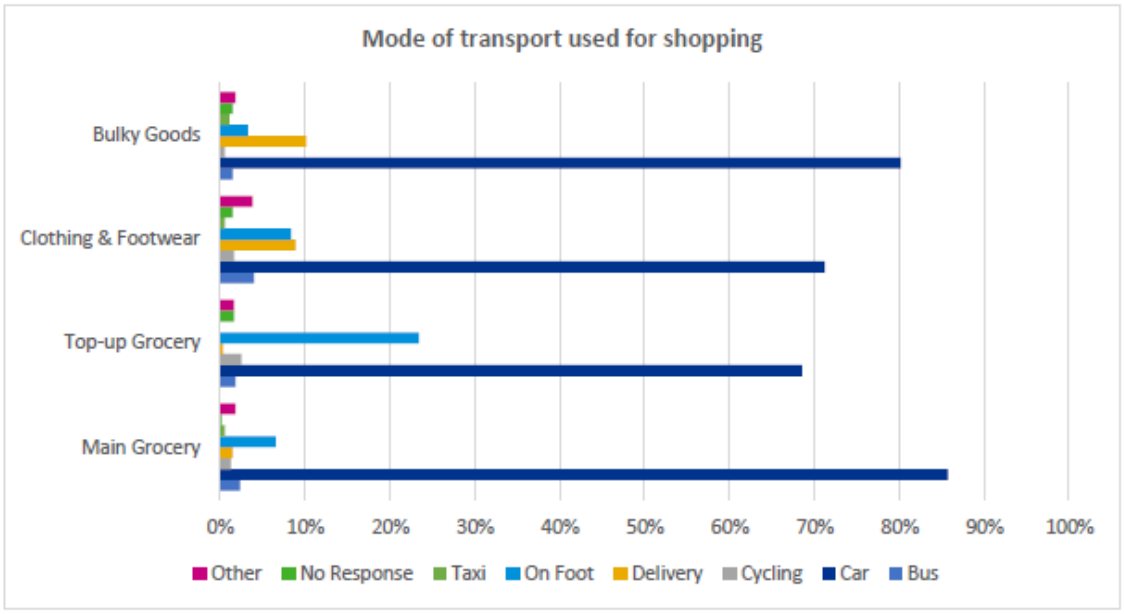
Shopping Location & Transport



Choice (variety) and convenience were both recorded in equal measure as important factors in the preference of shopping location for clothing & footwear (18%) and bulky goods (16%). In comparison, convenience was listed by 26% of respondents as an important factor in deciding where to do main grocery shopping. Connected to convenience, parking facilities are considered important at 33% of all respondent votes, with affordability closely behind at 30%. Car travel was listed as the main mode of transport for all types of shopping for respondents in Limerick, despite the 23% of respondents who would walk when doing top-up grocery shopping. Delivery options were mostly considered for clothing & footwear or bulky goods shopping, although still low at 9% and 10% respectively.

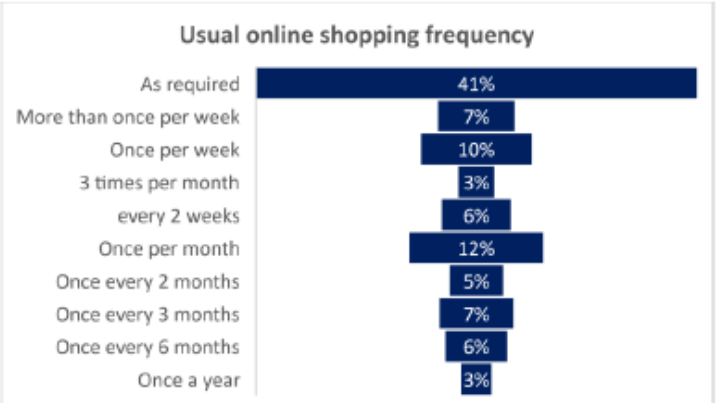
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Online Shopping







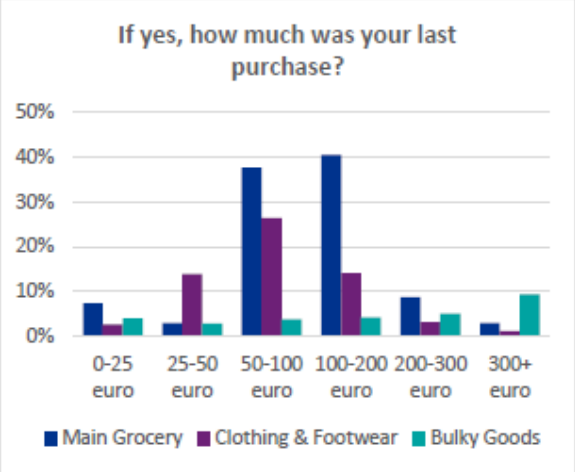


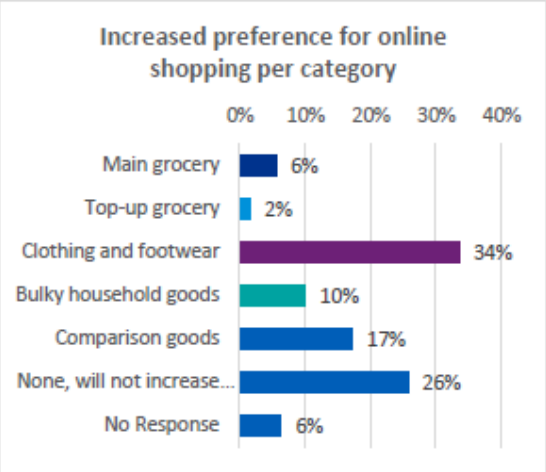


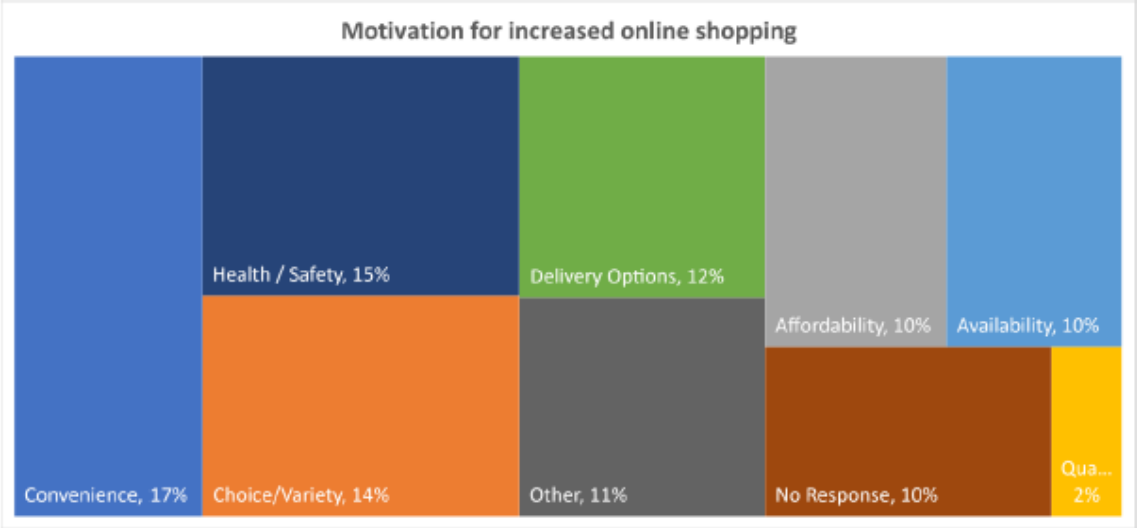
Only 47% of respondents in Limerick admitted to actively using online shopping before the onset of COVID-19, although 61% of respondents indicated that they will do more online shopping going forward. Reflecting the low use of online shopping for main groceries and bulky goods, 41% respondents indicated that online shopping is only used as/when required. 10% did however indicate that online shopping is used weekly, which is in line with the 11% of respondents using this method for main grocery shopping. While the majority of respondents still would not prefer online shopping for groceries or bulky goods, 64% do shop online for clothing & footwear. For those who do shop online, expenditure on clothing and footwear is quite disparate, while expenditure on groceries is relatively similar using online shopping compared to shopping at location.

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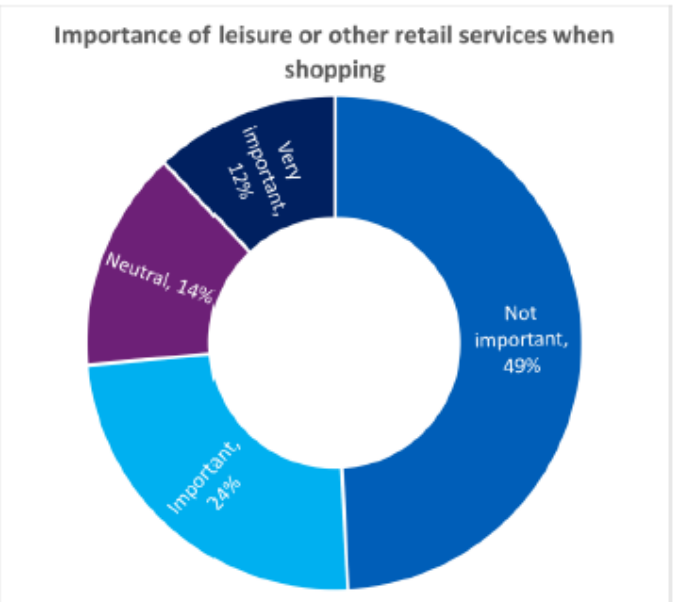




Despite the convenience (including delivery options), variety, and health and safety benefits of online shopping as highlighted by respondents, only 6% would increase their use of online shopping for main groceries, compared to the 34% (and additional 17%) who would shop more online for clothing & footwear and other comparison goods.

Generally, respondents still prefer physical shopping for groceries and bulky goods, with 26% of respondents considering no change or increase in their online shopping habits.

The majority of survey respondents indicated that the availability of leisure or other retail services when shopping has no importance (49%), or are indifferent to it (14%), while only 12% thought it was very important.

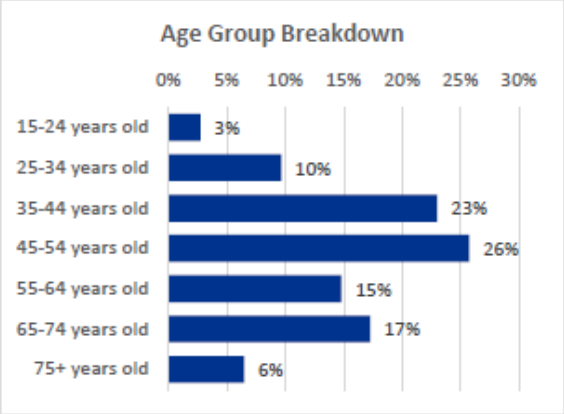


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4.3.2 Limerick Catchment

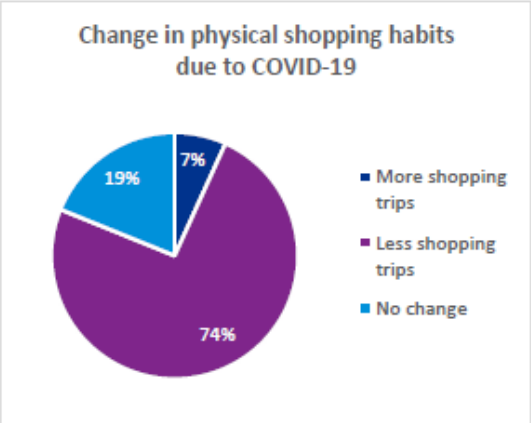
Demography

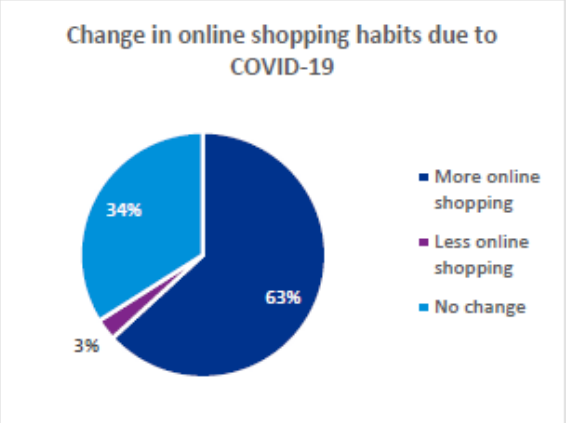


Survey Method	#	%
Phone	381	55%
Online	316	45%
Total	697	

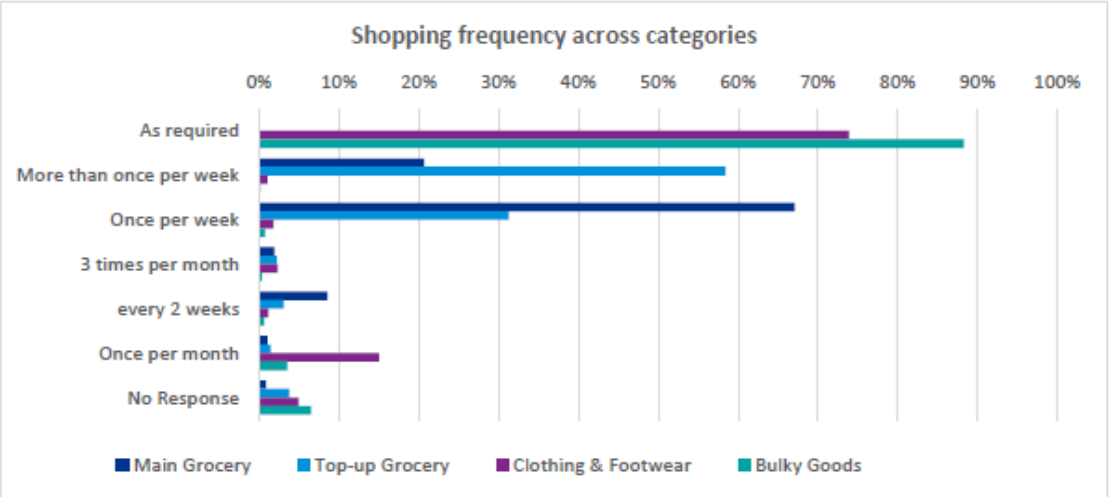
59% of the survey respondents from the Limerick Catchment Area are between 25 and 54 years, with 17% over the age of 65, giving a representative demographic split. Although 19% mentioned no change in their shopping habits, 74% of all respondents have been on less shopping trips (better planned trips, larger basket sizes), with 63% opting for more online shopping during the pandemic.

COVID-19





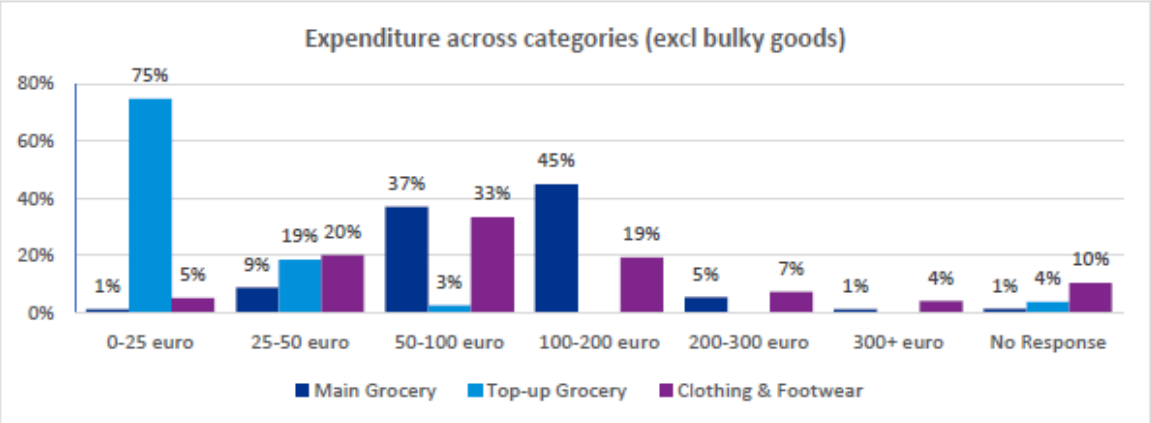
Shopping Habits

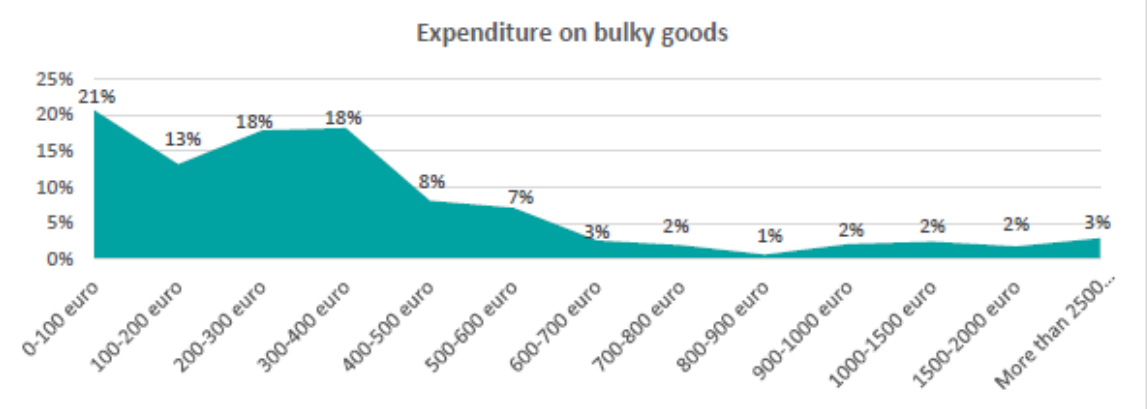


Shopping for clothing, footwear, and bulky goods are mostly done as and when required, with 15% of respondents indicating a monthly shop for clothing & footwear. 67% of shopping for main groceries is done at least weekly, with 58% of respondents doing an additional top-up shop more than once a week. The majority of top-up shopping does not exceed a value of €25, with 37% of respondents spending €50-€100 and 45% spending €100-€200 on main groceries. Similarly, majority of expenditure on clothing and footwear was also between €50 and €200. In turn, 70% of expenditure on bulky goods ranged between less than €100 to €400.

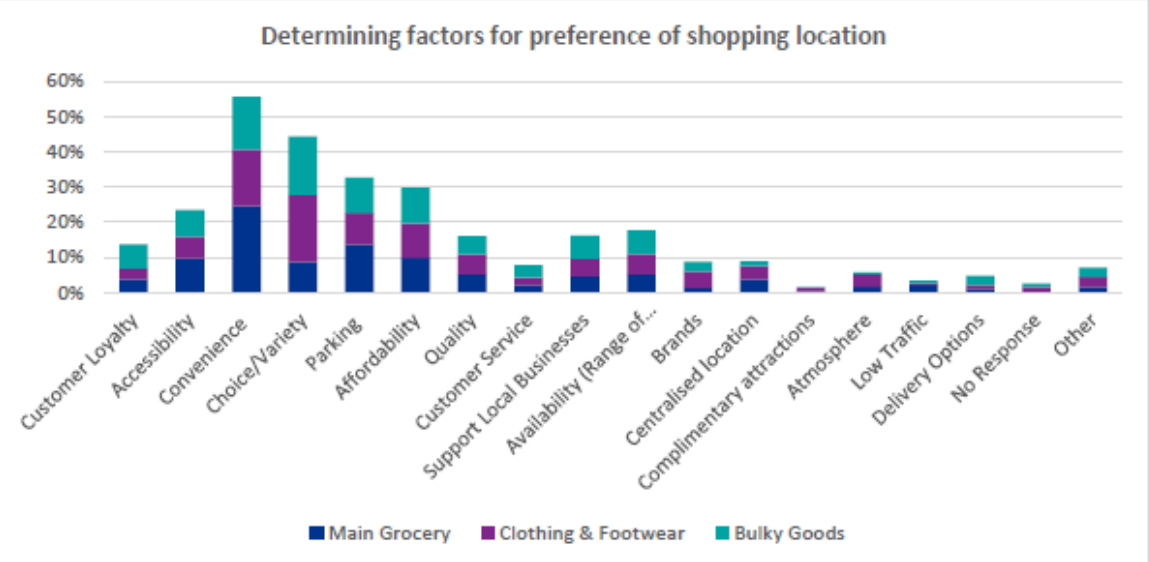
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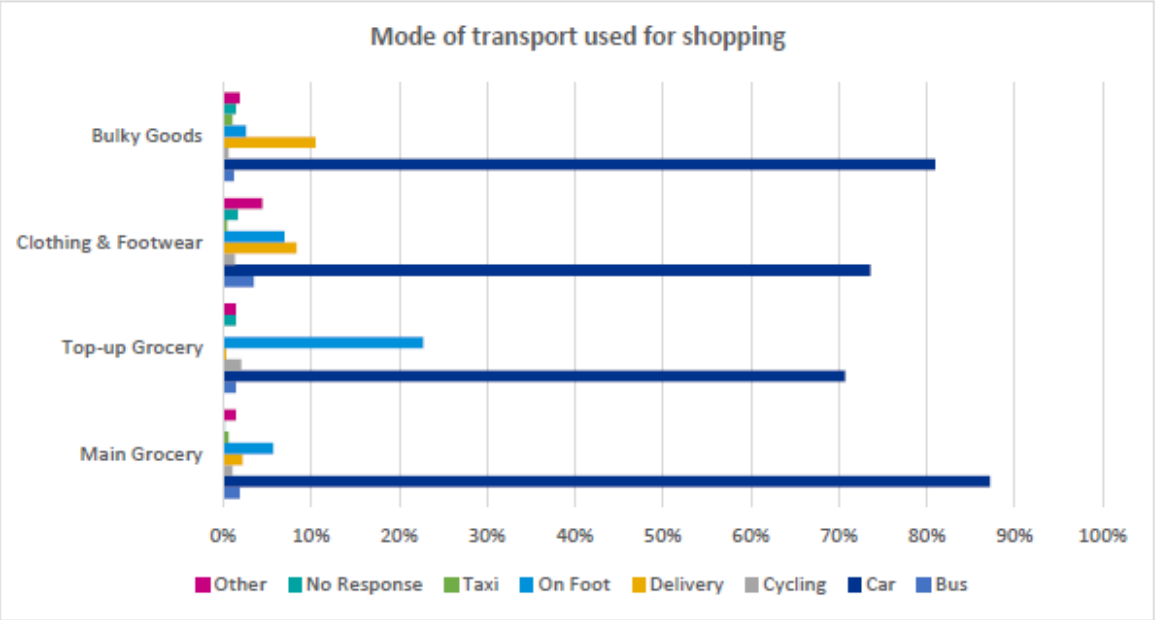
Shopping Location & Transport



Convenience and choice (variety) were marked as the most important determining factors for preference of a shopping location across all three shopping categories. Approximately 20% of respondents indicated that variety drives shopping location preference for clothing & footwear shopping, while convenience (24%), parking (14%), and accessibility (10%) were recorded as the most important factors for grocery shopping location. Affordability was rated equally important across categories, while the support of local business and availability of products were noted for all three shopping categories. Car travel was listed as the main mode of transport for all types of shopping, although 23% of respondents would do top-up shopping, and 7% do clothing & footwear shopping on foot.

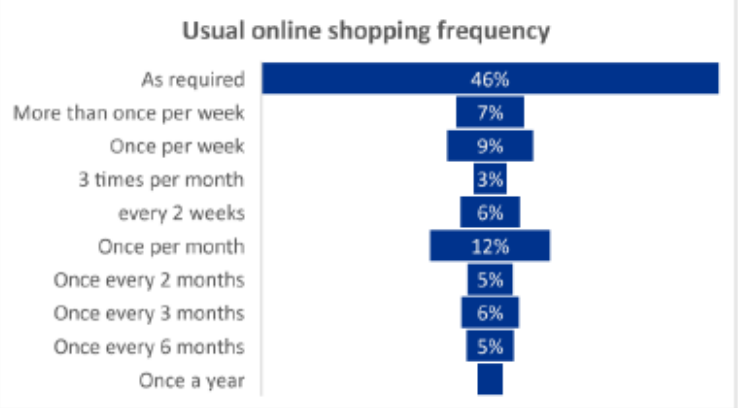
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Online Shopping







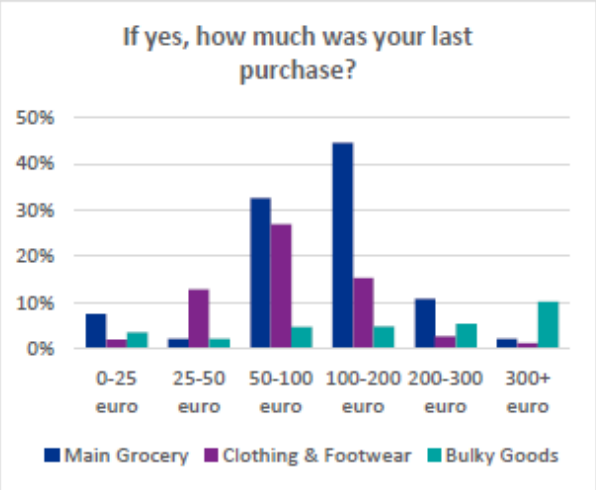


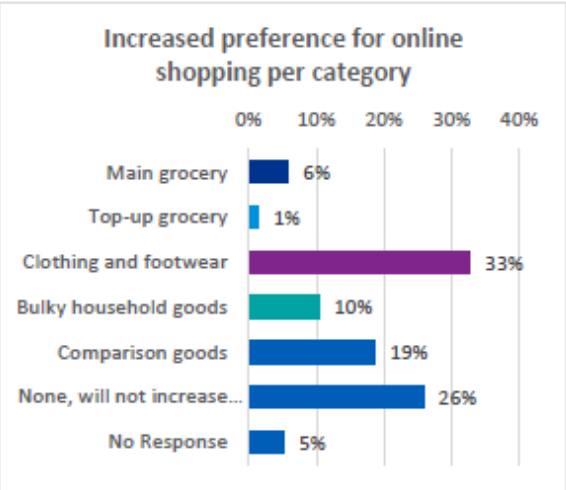


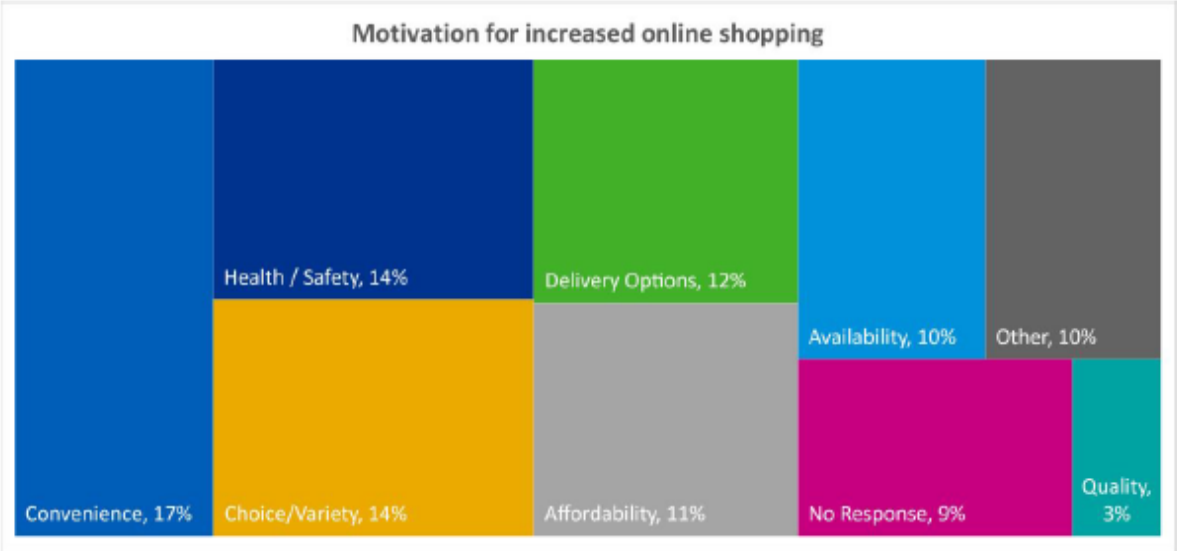
Although 60% of respondents in the Limerick Catchment would do more online shopping following the onset of COVID-19, only 48% actively used online shopping beforehand. Online shopping is mostly done as required (46%) or monthly (12%), while the majority of respondents still would not prefer online shopping for groceries or bulky goods. Despite that, 64% do shop online for clothing & footwear. For those who do shop online, expenditure on clothing & footwear is quite disparate, while expenditure on groceries is relatively higher using online shopping compared to shopping at location, with 45% of respondents' expenditure in the €100-€200 bracket.

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For those opting to shop online, the convenience, variety, and health and safety aspects it provides were highlighted as motivation for its increased use. Other motivations were the ease of being to shop 'anywhere at anytime' with the prospect of delivery, and being able to compare prices over a large variety and availability of goods.

Results from the catchment indicate that 33% of respondents intend to increased online shopping for clothing & footwear, Only 6% of respondents would shop more online for main groceries, with 26% not changing their tendency for online shopping.

39% of survey respondents indicated that the availability of leisure or other retail services when shopping has a level of important, while 46% do not see its importance.

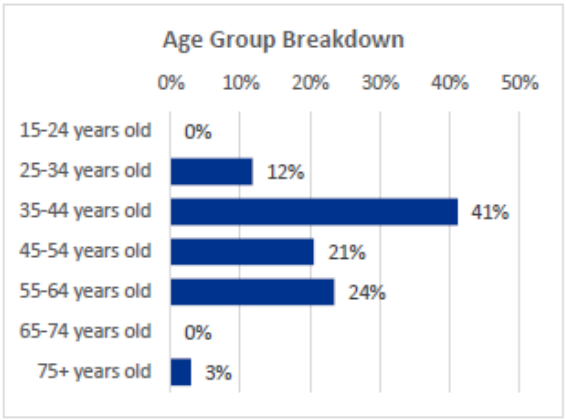


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4.3.3 Newcastle West Catchment

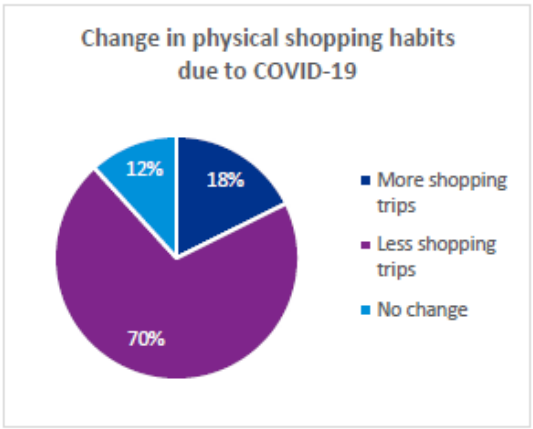
Demography

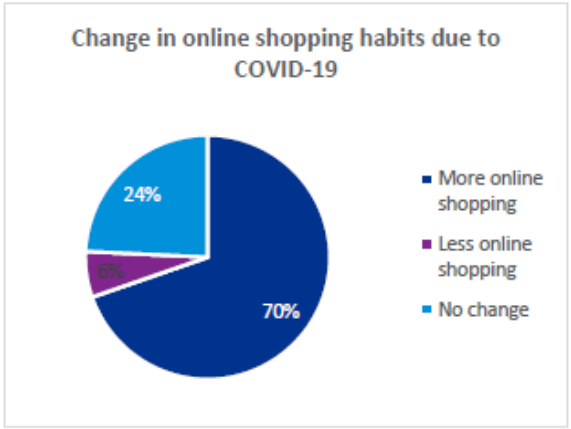


Survey Method	#	%
Phone	28	48%
Online	30	52%
Total	58	
Co. Limerick	550	

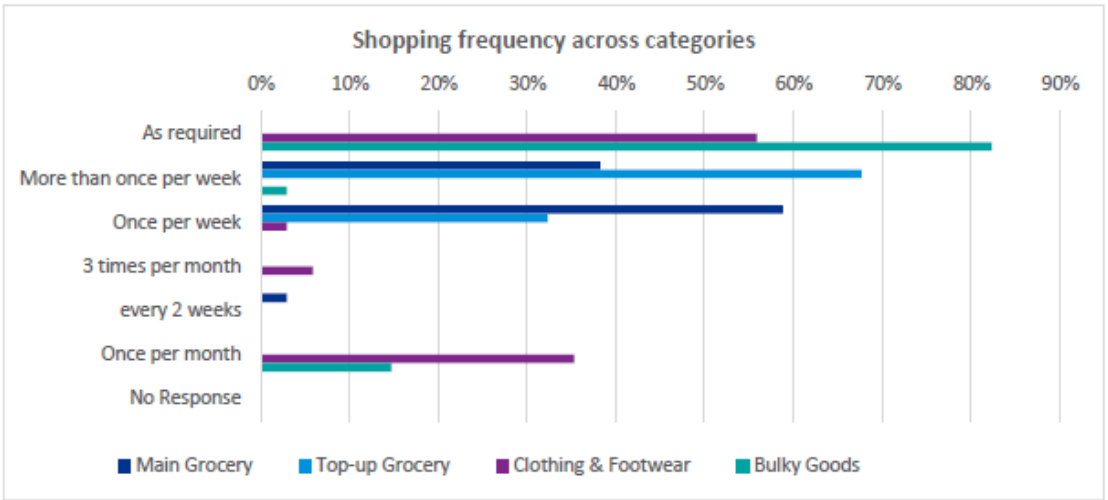
62% of respondents from Newcastle West recorded their age between 35 and 54 years, with an additional 24% in the 55-64 age cohort. 70% of all respondents admitted to doing less shopping trips due to COVID-19, with the same percentage increase in online shopping as an alternative. 24% of respondents however indicated that the onset of COVID-19 had not changed their online shopping habits.

COVID-19





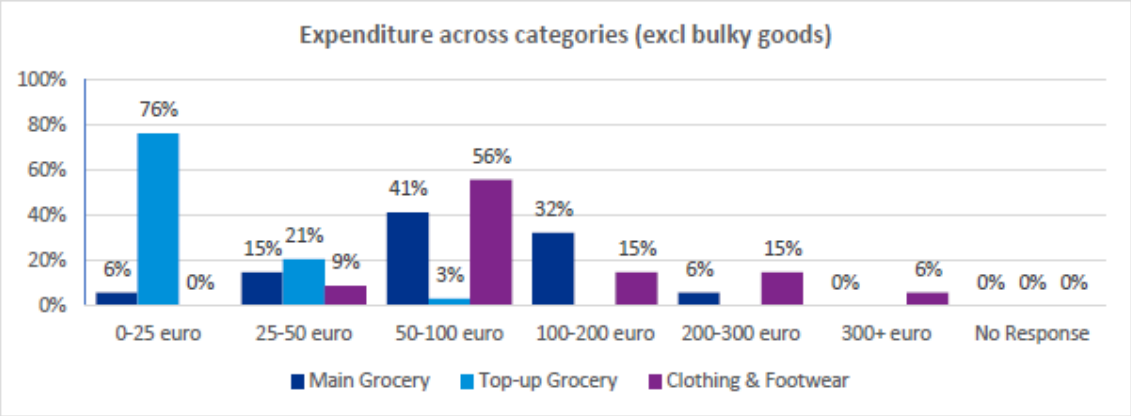
Shopping Habits

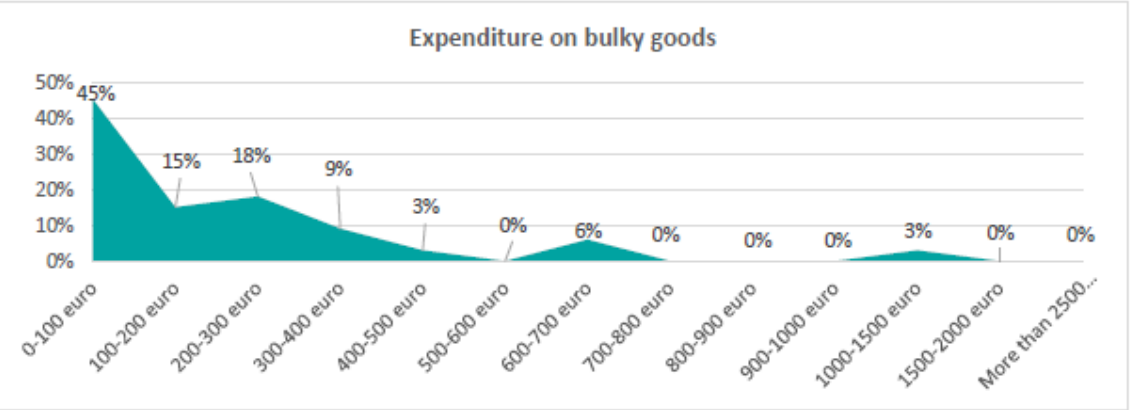


While 97% of shopping for main groceries is done at least weekly, 59% of respondents do so multiple times during a week. Shopping for clothing, footwear, and bulky goods are mostly done as and when required. Expenditure on main groceries and clothing and footwear are mainly between €50-€100, with 76% respondents doing top-up shopping to a value of up to €25. In turn, 45% of expenditure on bulky goods are in the lowest cohort of €0-€100, with 30% between €200 and €500.

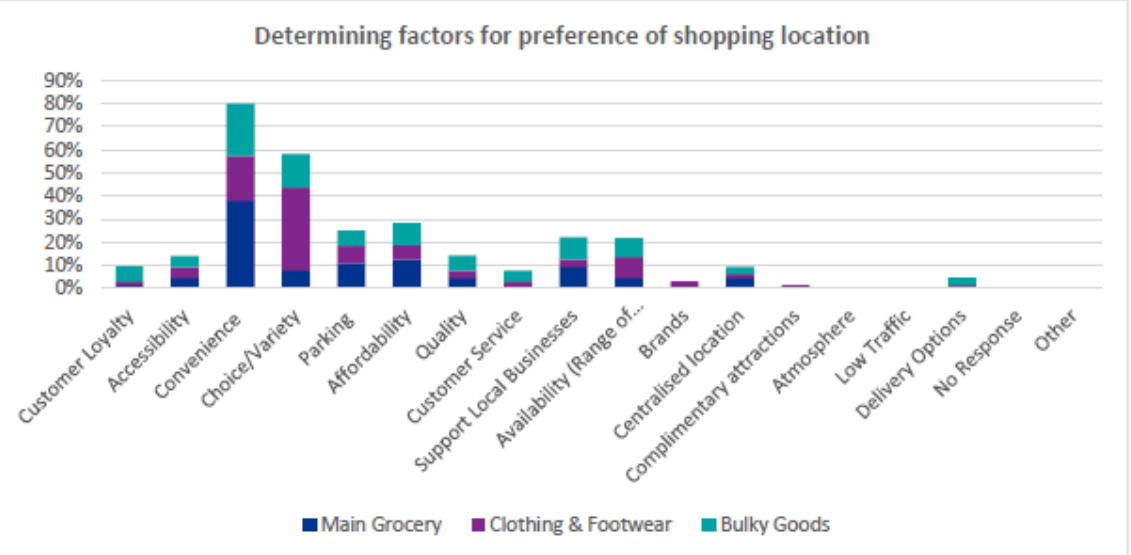
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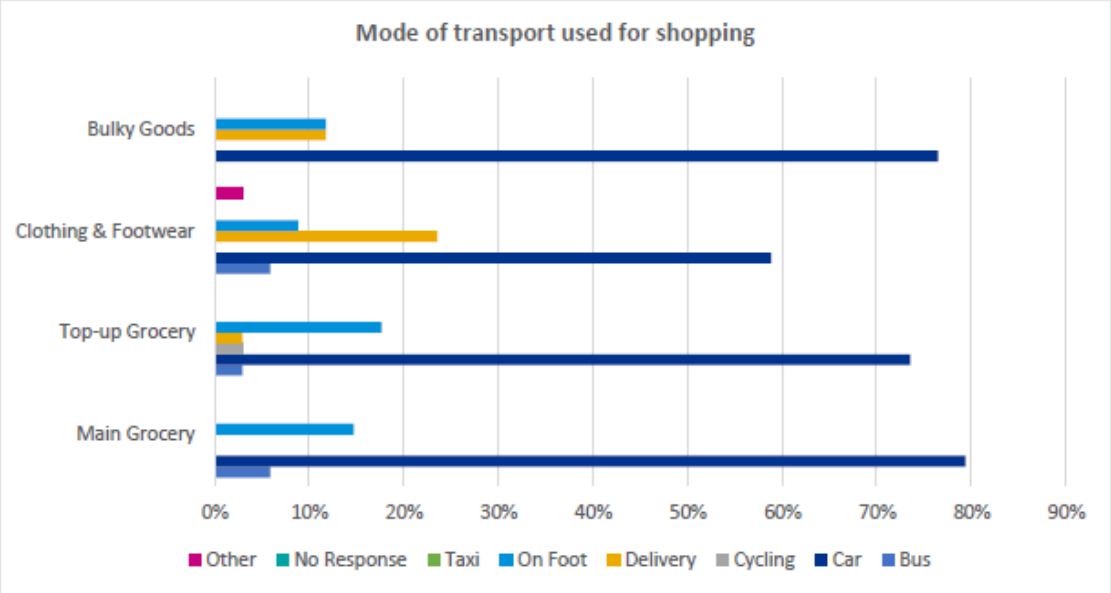
Shopping Location & Transport



Aross all shopping categories, convenience was indicated by 80% of respondents as a main determining factor in the preference of shopping locations. More specifically, 38% of respondents mentioned that convenience drives preference for grocery shopping location, while 36% of respondents mentioned choice (variety) as the most important factor when chosing where to shop for clothing & footwear. 23% of respondents also referenced convenience as important in bulky goods shopping locations. Although car travel was listed as the main mode of transport for all types of shopping for respondents in Newcastle West, an average of 14% of respondents would walk to go shopping. The use of delivery options for clothing & footwear was also prominent at 24% of responses.

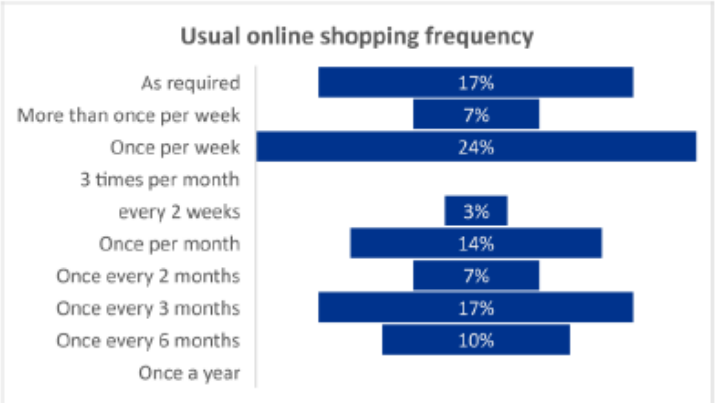
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Online Shopping







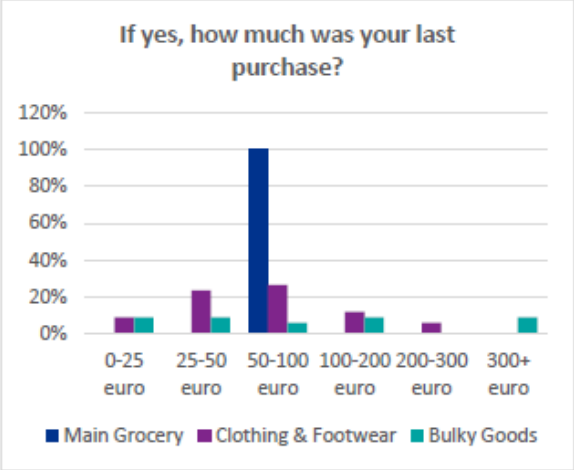




The usual use of online shopping is relative frequent for those who do (53% of respondents), with 24% of respondents making use thereof weekly, 7% multiple times a week, and 14% about once a month. Online shopping is mostly done for clothing & footwear purchases (for 79% of respondents). In turn, only 6% of respondents shop online for groceries. For those who do shop online, 50% of expenditure on clothing & footwear is between €25 and €100, expenditure on bulky goods is evenly spread across expenditure cohorts, while those that do shop online for groceries typically spend €50-€100.

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For those opting to shop online and increase the use thereof, the conveniece (26%) and health and safety (19%) aspects thereof are regarded the main motivators. As seen in overall results, the intent for online shopping for clothing and footwear is set to increase with 40%, while 19% are not expected to change their tendency for online shopping.

Generally, respondents still prefer physical shopping for groceries, with only 6% considering inceasing online shopping for these items.

48% of survey respondents indicated that the availability of leisure or other retail services when shopping has no importance to them, while 33% do attach a level of importance to it.



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4.3.4 Summary of Key Survey Results

The following section provides an overview of the key points highlighted from the survey results across each County and the selected catchment areas.

Demography

Summary

A sum of 1,394 survey results was collectively gathered using telephone and online survey methods. The surveys conducted reported the majority of survey results (97%) originating from respondents in the functional areas of Limerick City and County Council and Clare County Council, with the remaining 3% of results spread across 11 other counties (including Cork, Tipperary and Galway). The table below provides an overview of the number of survey responses in County Limerick and other Counties.

Table 4.1: Number of survey responses per County

Survey Method	Co. Limerick	Other Counties
Phone	336	269
Online	214	575
Subtotal	550	844
Total	1394	

The age group breakdown of the survey respondents provides a good representation of age groups, with 61% of respondents between the ages of 25 and 54 years and 31% between the ages of 55 and 74 years. The figure below provides the age group breakdown for all respondents across the 13 Counties represented.

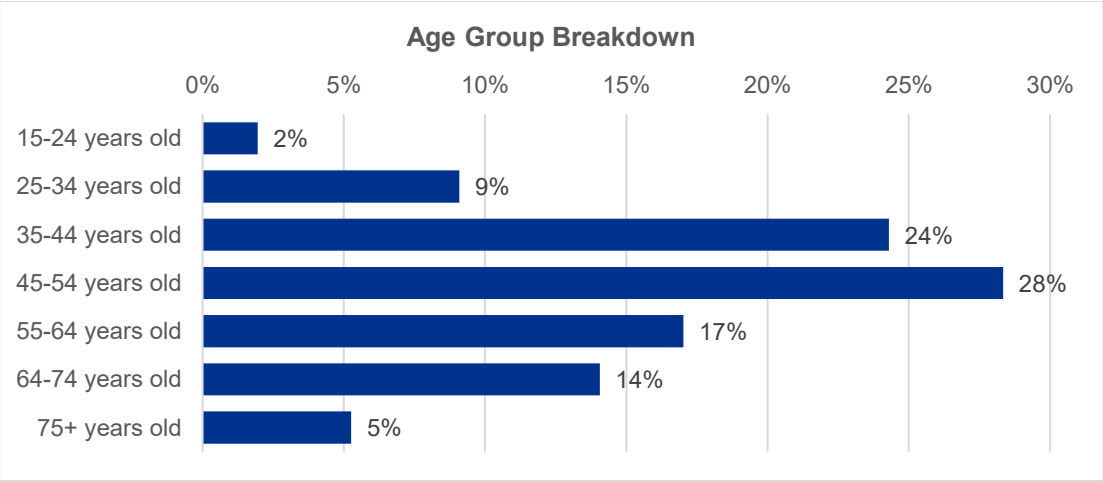


Figure 4-1: Survey respondent age group breakdown

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Key Insights:

The age group breakdown of survey respondents is generally similar at County level, with approximately half of respondents between 35 and 54 years of age.

In turn, 53% of respondents from Newcastle West were between 25 and 44 years old.

COVID-19

Summary

A series of questions requested feedback from respondents on the influence that the recent COVID-19 precautionary measures imposed by Government have had on their general shopping habits. The following figures provide an overview of the responses received.

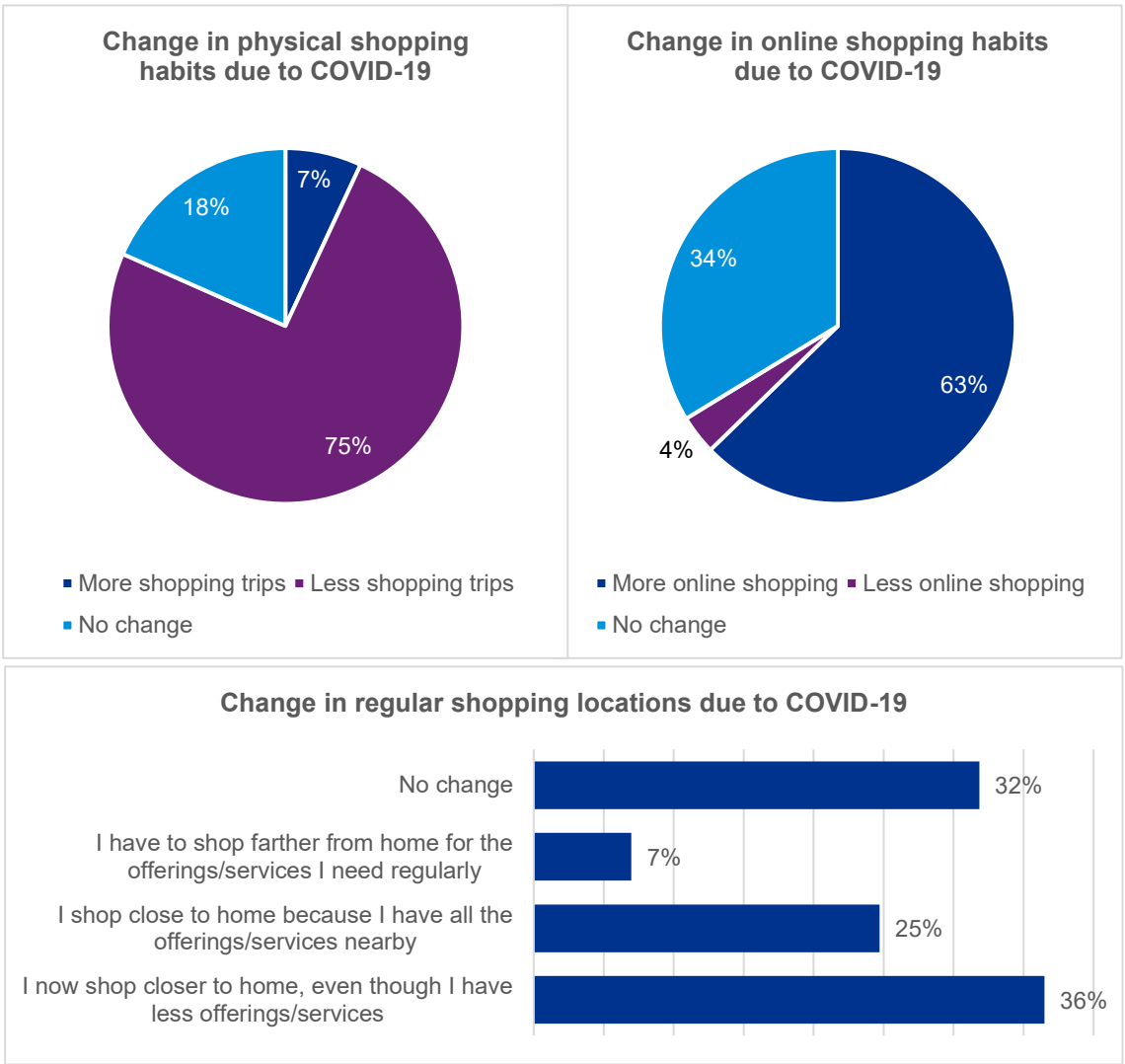


Figure 4-2: Change in regular shopping frequency and location

The predominant effects of the COVID-19 precautionary measures indicated a move away from physical shopping towards online alternatives. This was highlighted by the 75% shift toward reduced shopping trips (better organised trips, with generally larger

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basket sizes). Accordingly, respondents' tendency to use online shopping alternatives increased by 63%. Notably, approximately a third of respondents indicated no change in online shopping habits, indicating a prevalent and pre-existing use of online shopping options.

Although 32% of respondents indicated that their usual choice of shopping location did not change in response to COVID-19 precautionary measures, 36% of other respondents indicated the curtailment of their shopping movements and were inclined to shop closer to home, even though they did not have access to all the offerings or services as before.

Qualitative feedback from the phone survey process highlighted that respondents did not see the need to complete a retail survey if they were not allowed to do shopping as they normally would. A general negative connotation was noted between the COVID-19 precautionary measures and the retail activity, with multiple respondents providing 'no response' feedback on questions and attributing the lack of feedback to their ill experience of shopping under the COVID-19 precautionary measures that limit retail trade.

Key Insights

Physical Shopping Habits:

— Results at County and Metropolitan Area level show that 70%-75% of respondents reduced their number of physical shopping trips due to the COVID-19 precautionary measures put in place. Shopping trips were reduced, with basket sizes increasing and better planning of retail activities.
— Responses at local level were quite disparate. 18% of respondents in Newcastle West indicated that they increased their number of physical shopping trips under COVID-19 precautionary measures.
— While some disparity on the influence of COVID-19 precautionary measures exist at local level, respondents indicated that the measures had no impact on their physical shopping routines. Similar results were seen for Limerick City and Suburbs (25%), the Metropolitan Area (23%) and other areas in County Limerick (20%).

Online Shopping Habits:

— At County level, approximately two-thirds of respondents have increased their online shopping, compared to a third of respondents whose online shopping habits have not been influenced by COVID-19 precautionary measures.
— 70% of respondents in Newcastle West indicated an increase in the use of online shopping.

Shopping Habits

The results from a series of questions were analysed to highlight shopping habits in terms of frequency and expenditure.

Summary

As seen in Figure 4-3, the majority of respondents indicated that clothing and footwear and bulky goods are generally purchased as required. 16% of respondents did however indicate that clothing and footwear shopping is generally done on a monthly basis. In

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comparison and as expected, main grocery shopping and top-up shopping is done mostly once a week and more than once a week, respectively.

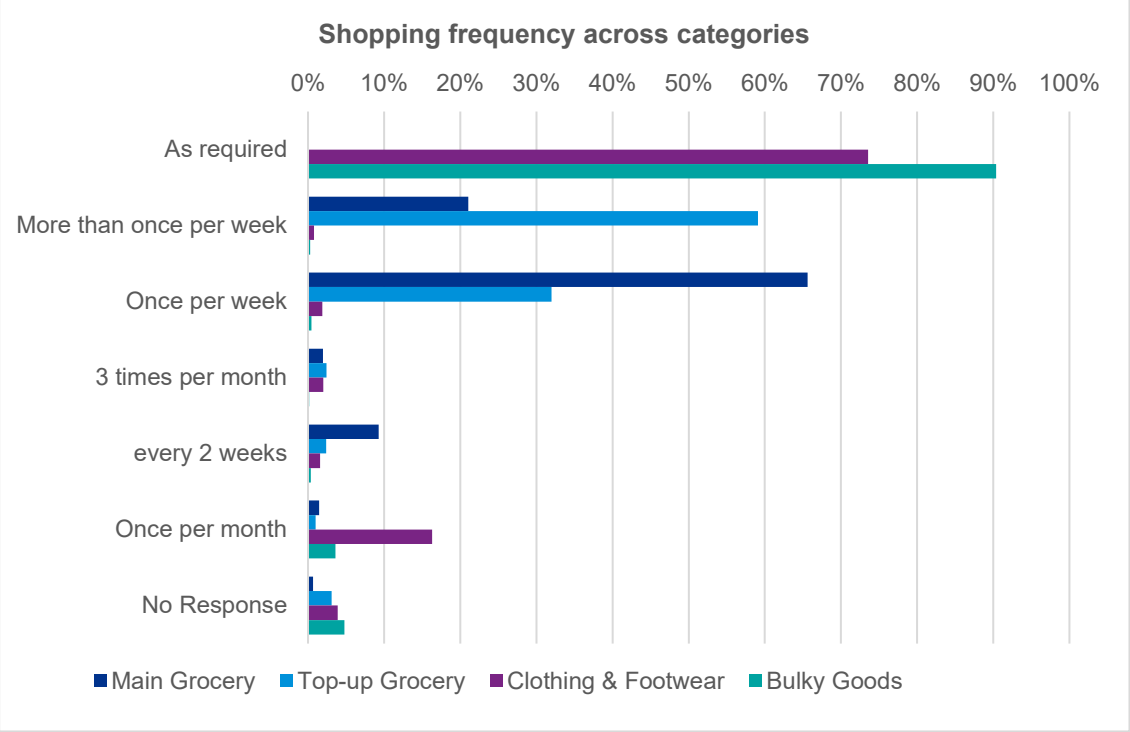


Figure 4-3: Shopping frequency across categories

In accordance with the shopping frequency, it is noted that top-up shopping is done frequently and mostly at a basket value not exceeding €25. Expenditure on clothing and footwear is represented in each of the expenditure brackets, with 57% between €50 and €200. More than 80% of respondents indicated spend on main groceries between €50 and €200, with 46% thereof between €100 and €200.

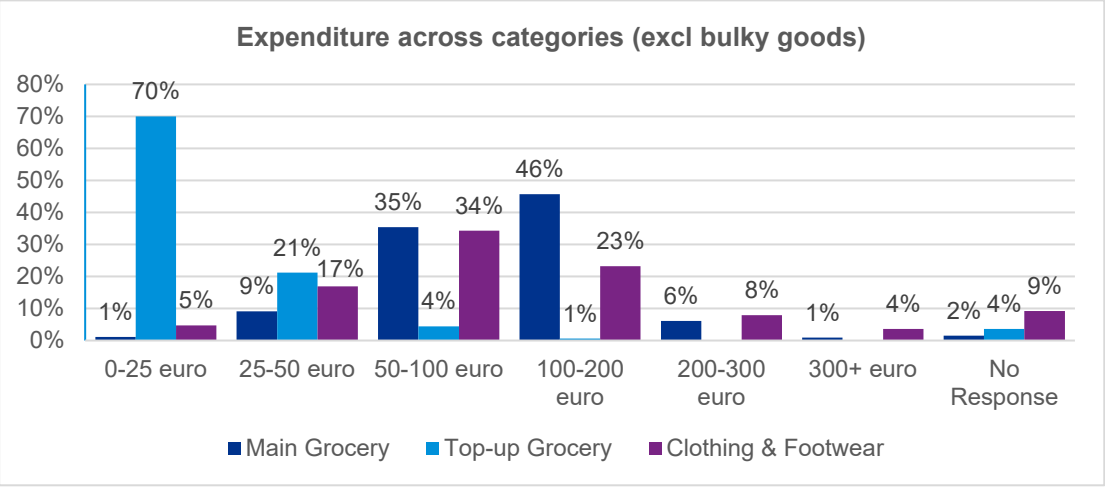


Figure 4-4: Expenditure across categories (excl. bulky goods)

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In turn, 34% of expenditure on bulky household goods is valued between €200 and €400, while 8% exceeded €1,000.

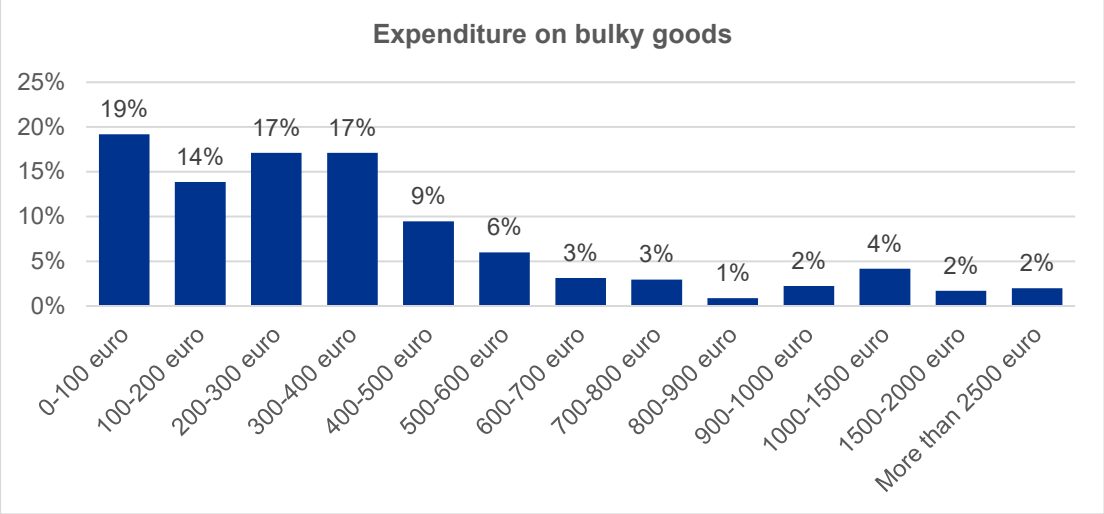


Figure 4-5: Expenditure on bulky goods

Key Insights:

Frequency:

— At County and Metropolitan Area level, survey results generally indicated that shopping for clothing and footwear and bulky goods are done as and when required.
— However, approximately 35% of respondents from Newcastle West would shop for clothing and footwear on a monthly basis.

Expenditure:

— Commonly between 60% and 70% of respondents' expenditure on top-up shopping would not exceed €25.
— Where more frequent main grocery shopping is seen, even more respondents spend less than €25 on top-up groceries.
— As seen in their tendency for monthly clothing and footwear shopping, 56% of respondents from Newcastle West typically spend €50-€100.
— Expenditure on bulky goods is mainly between less than €100 to €400, with some peak expenditure in the €1,000-€1,500 bracket.

Shopping Location and Transport

Summary

As seen in Figure 4-6, the joint most common factors determining the preference in shopping location across convenience and comparison categories are convenience and choice (variety). When considering grocery shopping, the convenient location of the shopping destination and the access to sufficient parking facilities trump the choice (variety) in products provided at that location. This is in line with the data on frequency of grocery shopping, with the frequency warranting efficient and convenient access to shopping locations.

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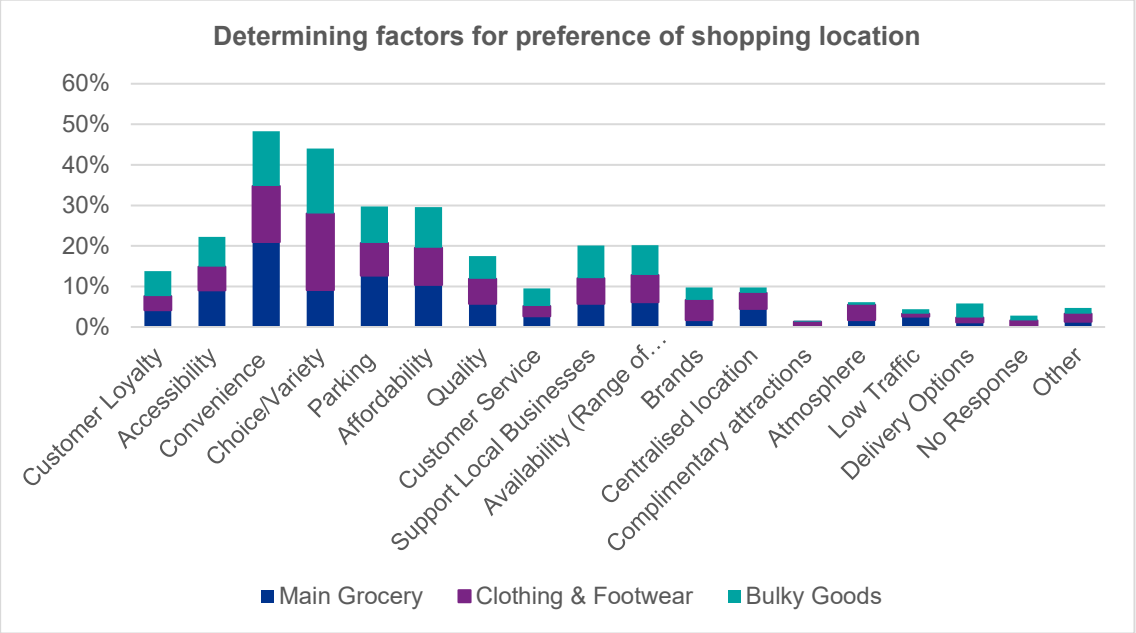


Figure 4-6: Determining factors for preference of shopping location

In turn, respondents indicated that choice (variety) is a key factor when shopping for clothing and footwear and bulky goods. Notably though, affordability is deemed equally important for each shopping type. In total, 20% of respondents noted that the support of local businesses is an important factor in determining shopping location.

On average, 81% of respondents recorded car travel as the preferred mode of transport for all types of shopping, while some would consider travelling on foot for top-up groceries or clothing and footwear shopping. Delivery options are also used, but mainly for bulky goods (10%) and clothing and footwear (7%) shopping. The following figure provides an overview of the statistics recorded.

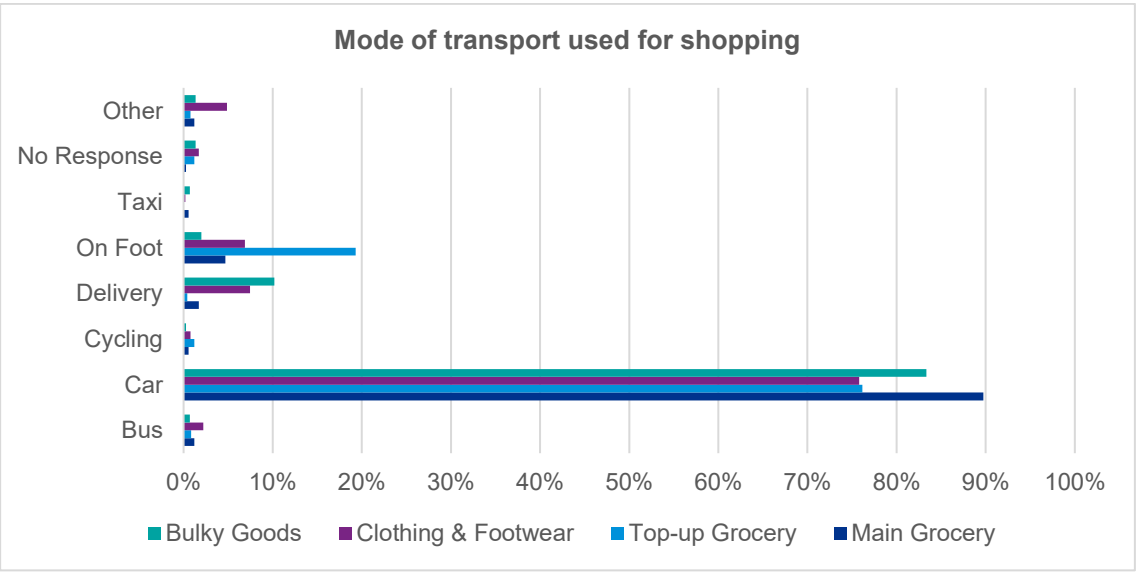


Figure 4-7: Preferred mode of transport when shopping

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Key Insights:

Although in different volumes across County and Metropolitan Area level, convenience (having convenient access to a shopping facility close to home or place of work/school/college) was highlighted as the key determinant factor influencing the choice of shopping location.

More specifically, convenience is highlighted as the main determinant for grocery shopping location, while choice (variety) is highlighted as the main determinant for clothing and footwear and bulky goods shopping location.

Respondents' overall preference and apparent dependency on personal car transport for shopping reflects the importance of parking (ease of parking, parking costs, proximity of parking to shops) and accessibility (convenient access, quality of roads, safe passage for pedestrians/cyclists, accessibility assistance for disabled patrons) in choice of shopping location.

Affordability ranks joint third in the top five most important factors for choice of shopping location, across all shopping categories and levels of survey analysis. The top 5 most important factors are:

— Convenience;
— Choice (variety);
— Parking and Affordability;
— Accessibility;
— Support of local businesses; and
— Availability (range of products).

Online Shopping

Summary

Survey respondents were asked to provide feedback on their online shopping habits, how these have changed with the onset of COVID-19 and what they see their online shopping habits might be in the future.



Figure 4-8: Online shopping habits and frequency

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As seen in Figure 4-8, just more than half of all respondents mentioned that they have actively shopped online before the COVID-19 restrictions and regulations, although the frequency of shopping was mostly as and when a product was required. Online shopping for groceries and bulky goods was recorded to be very low, with only 11% and 28%, respectively, of respondents shopping online for these goods. In comparison, more than two-thirds of respondents would actively shop online for clothing and footwear, as shown in Figure 4-9 below:



Figure 4-9: Online shopping preference per category

Similar to physical shopping, approximately 80% of respondents would spend between €50 and €200 on online shopping for groceries. In turn, a very small percentage of shopping in the three categories takes place at sales below €50. Online shopping expenditure on bulky goods is spread relatively evenly, with a 12% peak in expenditure exceeding €300. 29% of respondents indicated a last expenditure on clothing and footwear between €50 and €100, with another combined 29% of expenditure in the €25-€50 (14%) and €100-€200 (15%) brackets, as seen in the figure below:

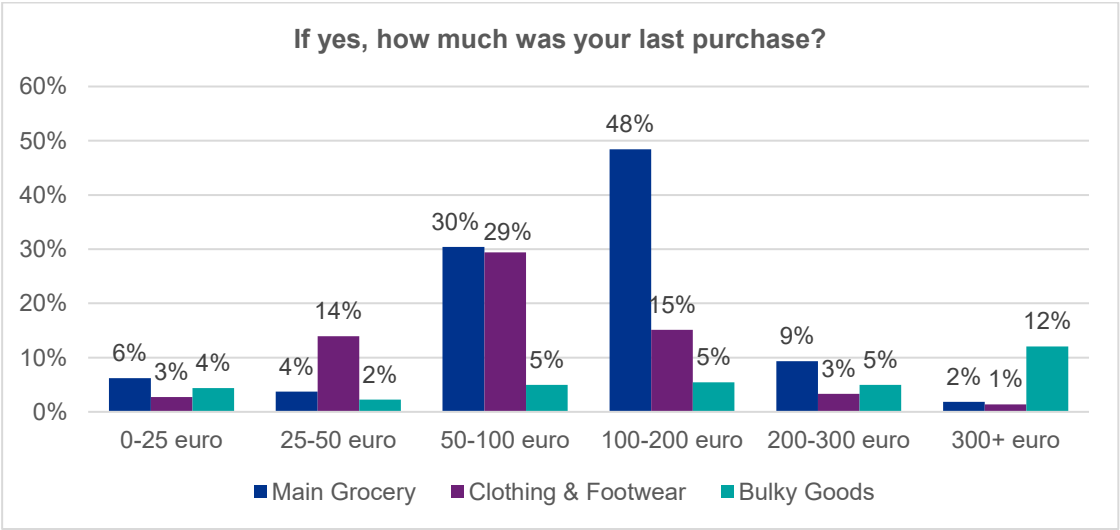


Figure 4-10: Last expenditure on online shopping

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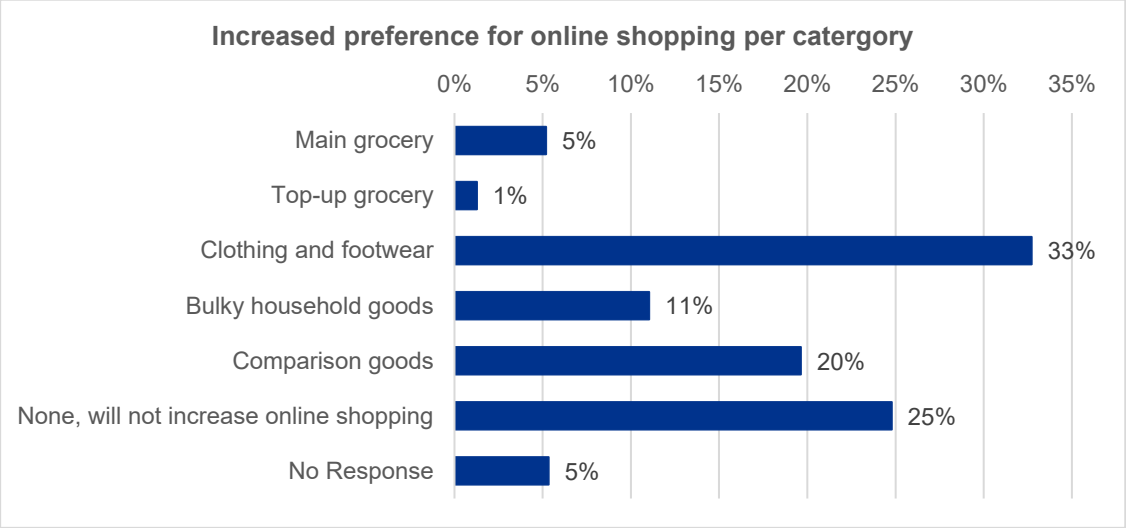


Figure 4-11: Increased preference for online shopping

Being asked whether respondents would have an increased preference for online shopping following COVID-19 and the subsequent adjustment of regular shopping habits, a quarter of respondents still indicated that their online shopping would not increase, as seen in Figure 4-11. Despite the 25% of respondents that would not shop online more frequently, 33% did however indicate an increased preference to shop online for clothing and footwear. This further supports respondents' tendency to shop online for clothing and footwear even before the onset of external behavioural change catalysts such as COVID-19. Additionally, 20% of responses indicated an increased preference to shop online for other comparison goods (small appliances, medical goods, books, etc.). Notably, the increase in online shopping for main and top-up groceries is small. This is also reflected in the general lack of online shopping in this category (89% as seen in Figure 4-9) and the importance of convenience, parking and accessibility (as seen in Figure 4-6) that respondents attach to grocery shopping.

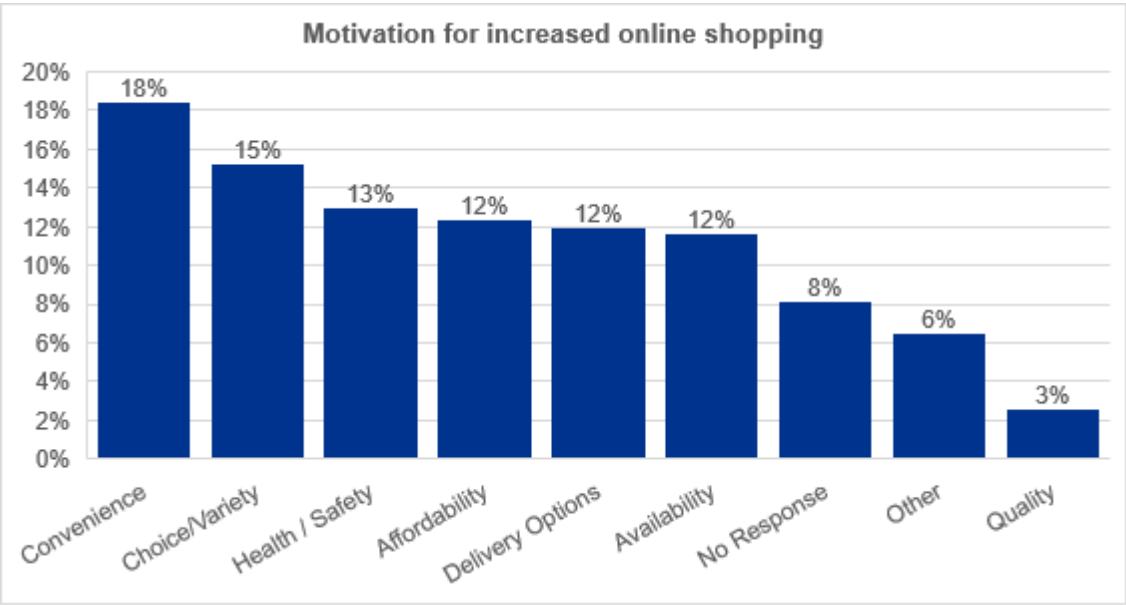


Figure 4-12: Motivation for increased online shopping

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For those respondents who would potentially increase their preference for online shopping, Figure 4-12 indicates the factors influencing the motivation for the increase. As seen in the figure above, apart from the convenience and choice (variety) generally associated with online shopping, it is evident that the personal health and safety enabled by online shopping is a large motivator. Additionally, the range of products available online and access to competitive and comparative pricing, with the convenience of delivery, makes online shopping an attractive shopping alternative.

Key Insights:

- From survey results gathered, 47% of respondents from County Limerick actively used online shopping before the onset of COVID-19 precautionary measures.
- While the majority of respondents over the different survey analysis levels mostly use online shopping only as required, 31% of respondents from Newcastle West use it at least weekly, of which 7% use it more than once weekly. Other respondents also indicated the use thereof once a month (14%) or every three months (17%).
- Despite the Newcastle West respondents' more frequent use of online shopping, only 6% use it to shop for main groceries, compared to 79% who use it for clothing and footwear shopping.
- Online shopping is most popular for clothing and footwear, particularly for respondents in Newcastle West (79%). Other settlements also recorded figures between 70% and 75%, while only 62% of respondents in the Metropolitan Area shop online for clothing and footwear.
- Following the adjustment of living and shopping with COVID-19 precautionary measures, approximately a third of all respondents will increase online shopping for clothing and footwear (40% of respondents in Newcastle West). Overall, only 4%-6% of respondents intend to increase online shopping for groceries.
- Online shopping for other comparison goods is also likely to increase, with increases in bulky goods shopping as indicated by respondents from Limerick-Shannon Metropolitan Area (9%) and Newcastle West (17%).
- Although online shopping will increase for some, 28% of respondents from the Limerick-Shannon Metropolitan Area (29% from Limerick City and Suburbs; 31% from Shannon) will not increase their tendency to shop online.
- In turn, only 19% of respondents from Newcastle West will not increase their use of online shopping, compared to the 76% who would, with increases noted across all shopping categories.
- Most commonly, the convenience of online shopping (being able to do so from nearly anywhere at any time) was marked as the biggest motivation for its increased use.
- The option of delivery associated with most online shopping is generally highlighted, although trumped by the choice (variety) and ability for price comparison provided through online shopping.
- Recent conditions under COVID-19 precautionary measures have also underlined the health and safety aspect provided through the use of online shopping, particularly highlighted by respondents in Newcastle West (19%) and the Limerick-Shannon Metropolitan Area (13%).

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4.3.5 Inflow and Outflow

The rate of inflow and outflow of persons to and from retail catchment areas is determined by the analysis of the representative survey respondents' responses to their preference in shopping location for goods in the three retail categories of interest. Survey respondents were asked to confirm their area of residence and their preferred shopping locations for various goods, which were assessed and provides an indication of people's willingness, preference and need to travel for retail shopping. The results were modelled to provide a rate of inflow to and outflow and leakage from catchment areas for convenience, comparison and bulky goods shopping.

4.3.5.1 Core Inflow, Outflow and Leakage

Core outflow refers to the movement of survey respondents (resident in any of the catchments within either County Limerick or County Clare – where relevant to Limerick Catchment) out from one assessed catchment to another for shopping, while leakage refers to the movement of resident survey respondents to other retail facilities outside of either County's boundaries or catchment areas (i.e. movement to other Counties' retail facilities for shopping). Core inflow refers to the number of survey respondents indicating movement into another catchment area (in which they do not reside) for the purpose of shopping, while also including movement of survey respondents, resident in other Counties, into an assessed catchment in County Limerick[14].

The following table provides a summary of the inflow, outflow and leakage for each catchment area, as calculated from received survey results:

Table 4.2: Summary of Core Inflow, Outflow and Leakage

		County Limerick Catchments	
	Area	**Limerick (Incl. Metro)**	**Newcastle West**
Convenience	***Outflow***	*0.0%*	*13.0%*
	Inflow	*5.8%*	*1.4%*
	Static	*100.0%*	*87.0%*
Comparison	***Outflow***	*9.5%*	*60.0%*
	Inflow	*32.4%*	*3.2%*
	Static	*90.5%*	*40.0%*
Bulky	***Outflow***	*8.6%*	*40.0%*
	Inflow	*30.3%*	*13.3%*
	Static	*91.4%*	*60.0%*

As seen in the table above, the survey response data indicated different results in the assumed movement of people for the three retail types of interest. Respondents residing

[14] Changes in the percentage inflow and outflow for 2020 and 2021 were applied in accordance with CSO Retail Sales Index and Central Bank of Ireland figures to account for the changes in movement and retail sales brought on by COVID-19.

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in the Limerick Catchment indicated a general tendency to shop within the catchment for convenience, comparison and bulky goods, which was reflected in the high percentage of 'static' responses. There was no recorded outflow of respondents for convenience shopping outside of the Limerick Catchment, although there was limited outflow for comparison (9.5%) and bulky (8.6%) goods. Inflow into the Limerick Catchment consisted of 32.4% for comparison goods and 30.3% for bulky goods, which is in addition to the static respondents in each of the aforementioned categories exceeding 90%.

The position of Limerick City and Suburbs and the Metropolitan Area in the retail hierarchy, together with the prevalence of well-established City Centre and shopping centre retail nodes is reflected in the inflow-outflow results from the survey. The prevalence of established and wide variety of retail facilities give rise to the high levels of 'static' respondents and considerable levels of inflow for shopping into the catchment.

In comparison, outflow from the Newcastle West Catchment for comparison goods shopping was significant, with 60% of respondents indicating that they do not shop for comparison goods within the catchment. Considerable outflow for bulky good shopping was also recorded (40%), although 60% of respondents do stay in the catchment with the addition of 13.3% inflow for bulky goods shopping. The majority of respondents from the Newcastle West Catchment stay within the catchment for convenience shopping (87%).

4.3.5.2 Online Shopping Expenditure Outflow

Data published by the CSO's Retail Sales Index[15] on the impact to the retail sector of the COVID-19 crises reveals that the volume of retail sales decreased by 21.8% in January 2021 when compared to December 2020 on a seasonally adjusted basis. On an annual basis, retail volumes were 14.1% lower in January 2021 compared with January 2020. Retail sales fell across all categories, with the exception of Electrical Goods which increased by 1.3% compared with December of the previous year. Retail sales in January 2021 were 13.6% lower than in February 2020 before the crisis started.

When comparing the volume of all retail sales from January 2021 to the year prior (Figure 4-13), only Food Businesses saw an increase (10.7%) (an equivalent to convenience), with Non-Food (excluding Motor Trades, Fuel and Bars) falling by -17.6% and Books, Newspapers, Stationery and other Goods falling by -3%. Both are an equivalent to comparison goods largely (with some overlap in convenience).

[15] Retail Sales Index January 2021 - CSO - Central Statistics Office

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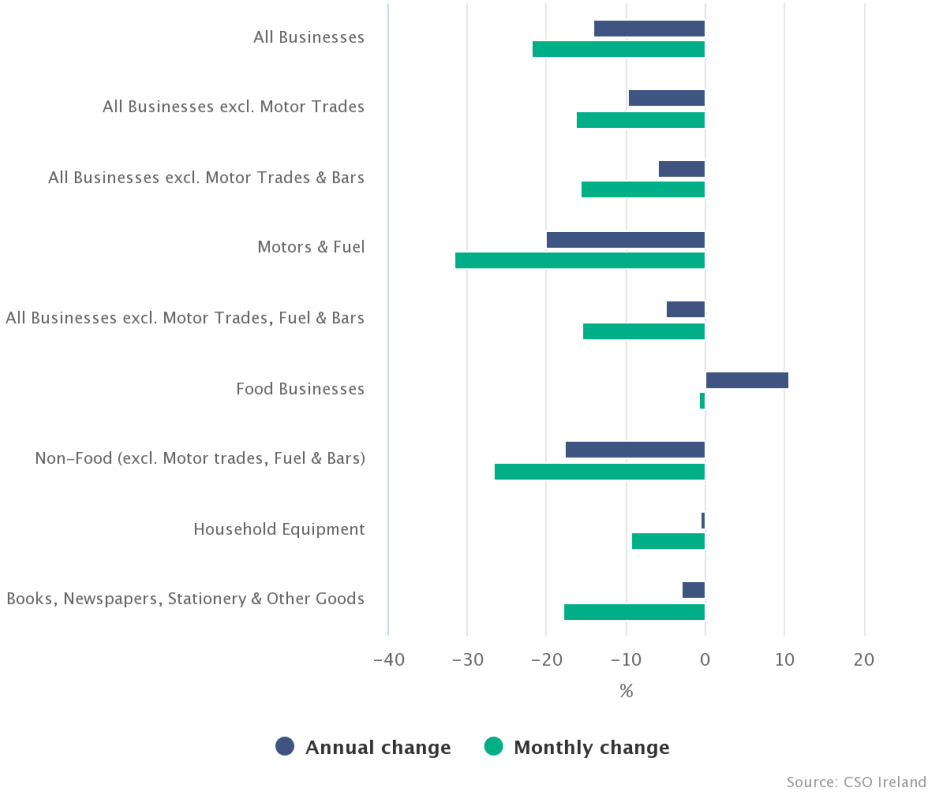


Figure 4-13: Annual and Monthly Volume % Changes for Retail Sales January 2021 vs. January 2020 – CSO (March 2021)

These data indicate a significant arrest in physical goods transactions during the period. However, they do not capture online retailing.

The proportion of retail sales transacted online (from Irish registered companies) increased to 10.9% in January 2021 from 5.8% in December 2020.

Indeed, this upturn is closely related to lockdown measures restricting the opening of retail premises for much of 2020 and 2021 (as of writing). However, the proportion of online sales from Irish registered companies for Food Businesses was 3.3% in January 2021, an increase from 1.7% the year prior. Whereas non-food (excl. Motor trades and Bars) was 26.1%, up from 7% the year prior. Household equipment saw increases as well to 15% of sales online, up from 6.4%[16].

When coupled with the unknown levels of international shopping across both categories and particularly for emerging forms (of point to point collection service providers outside of the convenience stores themselves, e.g. Deliveroo with Aldi and Buymie with Lidl), it can be realistically assumed levels have been much higher – particularly during lockdown periods.

Therefore, an assumed international component has been applied to the consideration of appropriate rates of online retailing (or special forms of trading/SFT), as outflows to the assessed expenditure (set out in Chapter 6). These are supported by reporting CSO

[16] Table 7, Retail Sales Index January 2021 - CSO - Central Statistics Office

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data (which began tracking in November 2019) as well as sentiment expressed by the householder survey conducted into shopping habits online pre- and post-COVID-19.

The rates utilised are as follows for 2019, 2020, 2021 and from 2022 to period end:

Table 4.3: Applied Rates of Online Outflow - Informed by Historic CSO and Assumed Future Shopping Habits

Year	Convenience	Comparison	Bulky
2019	**5.70%** CSO Jan '20 1.7% + 4% intl. assumed	**15.20%** CSO Jan '20 10.2% + 5% intl. assumed	**11.40%** CSO Jan '20 6.4% + 5% intl. assumed
2020	**8.70%** CSO Dec '20 2.7% + 6% intl. assumed	**24.50%** CSO Dec '20 14.5% + 10% intl. assumed	**21.80%** CSO Dec '20 11.8% + 10% intl. assumed
2021	**8.70%** Continuation of 2020	**24.50%** Continuation of 2020	**21.80%** Continuation of 2020
2022+	**6.00%** Assumed 2% Domestic + 4% international	**12.00%** Assumed 4% Domestic + 8% international	**10.00%** Assumed 4% Domestic + 6% international

4.3.5.3 Tourism Expenditure Inflow

The tourism sector has been disproportionately impacted by COVID-19 and the interim loss of this vital source of expenditure inflow into the study area presents a significant challenge for the viability of many retail businesses in convenience and comparison forms. Indeed, the latest statistics available at the time of preparing this study indicate that there has been a seismic impact in the sector's overall numbers, in both visitors and correspondingly in revenue.

With the CSO noting that there had been a -95.5%[17] decline in arrivals from overseas travellers in January 2020 vs 2021. Naturally the domestic market has similarly evaporated. This is not surprising given during much of 2020 and 2021, the sector has required significant closures, or a complete shutdown, due to implementation of necessary health and safety measures.

With the rollout of the national vaccination program underway, in tandem with similar programmes internationally – and critically in key overseas markets, the outlook for a

[17] Air and Sea Travel Statistics February 2021 - CSO - Central Statistics Office

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recovery scenario in both domestic and overseas tourism inflow back into the local economy is bright.

Despite these extraordinarily difficult times, it is important to be mindful of the fact that pent-up demand for travelling remains significant, as does built-up disposable income (>€11bn, of which €5bn may be spent as soon as the economy reopens)[18]. Once travel and operational restrictions lift and the sector sustainably stays open, collected sentiment points to a strong desire to return to pre-COVID-19 levels.

In June 2020, the Irish Tourism Industry Confederation (ITIC) published its first Tourism Industry Revival Plan, setting out a pathway for recovery contingent upon health care developments. In January 2021 this was revised[19] to account for the commencement of the vaccine programmes, as the first major step towards seeing that recovery materialise.

Though the challenges of reopening the sector are not equal, neither geographically, nor by type of industry, the ITIC has produced a comprehensive outlook based around an evidenced based options analysis of the likely trajectories towards recovery starting in 2021.

Three scenarios – Optimistic, Base and Downside present a set of possible or plausible paths to recovery based on current available information, assumptions and risks (see Figure 4-14).

ASSUMPTIONS	Scenario A: *OPTIMISTIC*	Scenario B: *BASE CASE*	Scenario C: *DOWNSIDE*
Vaccine	- Rollout effected to 60%/70% population in Ireland & most source markets by Q3'21	- Rollout effected by Q4'21/Q1'22 - Uneven distribution	- Delayed effective roll-out; low take-up, or proven ineffectiveness.
Safe travel protocols	- Test & trace: comprehensive system in place by Q3 - International agreement on facilitation, e.g. secure health passport system; app.	- Testing : less than adequate system until late 2021 - Fragmented approach with varied standards	- Testing: Absence of, or lack of confidence in system - Haphazard approach without credible norms
Connectivity (Air services vs. S2019)	- Short haul capacity: min. 40% 2H'21 rising to >75% S'22 & >90% by S23 - Long haul: min. 35% 2H'21 rising to > 65/75% S'22 & >90% by S24	- Short haul min. 35% in Q4'21 rising to >75% by S23 & > 90% by S24 - Long haul 35% Q43521 rising to 70% by S'23 & >80% by S24	- Short haul < 35% in Q4'21 recovering to >75% by S24 - Long haul <35% Q4'21 gradual increase to 75% by S24
Economy	- Global GDP close to +5% in 2021 - Developed economies to pre-Covid growth by '22 - Increased level of consumer savings in target markets - Oil prices remain low in short term months	- Global GDP close to +5% in 2021 - Developed economies to pre-Covid growth by '22 - Increased level of consumer savings in target markets - Oil prices remain low in short term months	- Slower global growth due to continued economic disruption due to coronavirus - Consumer hesitancy re spending - Unemployment & inflation
Demand restart	- VFR: Fast rebound from 2H'21 - Leisure: Re-starts <35% from Q3'21 into '22 - Business: 40% level from 2H'21	- VFR: Rebound from Sept./ Oct.'21 - Leisure: hesitant < 25% from Sept.'21 - Business: <40% from Q3'21	- VFR: restarts Q4'21 into '22 - Leisure: restart delayed to S22 - Business: <20% from Q4'21

Figure 4-14: ITIC's outlook of recovery scenarios in tourism sector (ITIC, January 2021)

[18] Vol 2021, No.4, Saving during the pandemic: Waiting out the storm? (Reamonn Lydon and Tara McIndoe-Calder) (centralbank.ie)

[19] ITIC – Industry Recovery Roadmap – How Irish tourism can recover from an existential crisis

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In summary, each scenario assumes[20]:

A. **Scenario A – Optimistic:** Travel restrictions be removed by July 2021, following effective and on schedule vaccine rollout in Ireland and main source markets, together with coordinated multilateral agreement and implementation of safe travel protocols including testing and vaccination verification.

B. **Scenario B – Base Line/ Most Likely:** Based on current conditions – no international tourist flows before September/October 2021 with mixed market response due to uneven vaccination rollouts and delays in establishing universal safe travel protocols. Effective recovery delayed to 2022.

C. **Scenario C – Downside:** Further delay to restart due to virus surges or tail-risk fears, vaccine effectiveness compromised by new variants and/or failure to establish universal safe travel protocols.

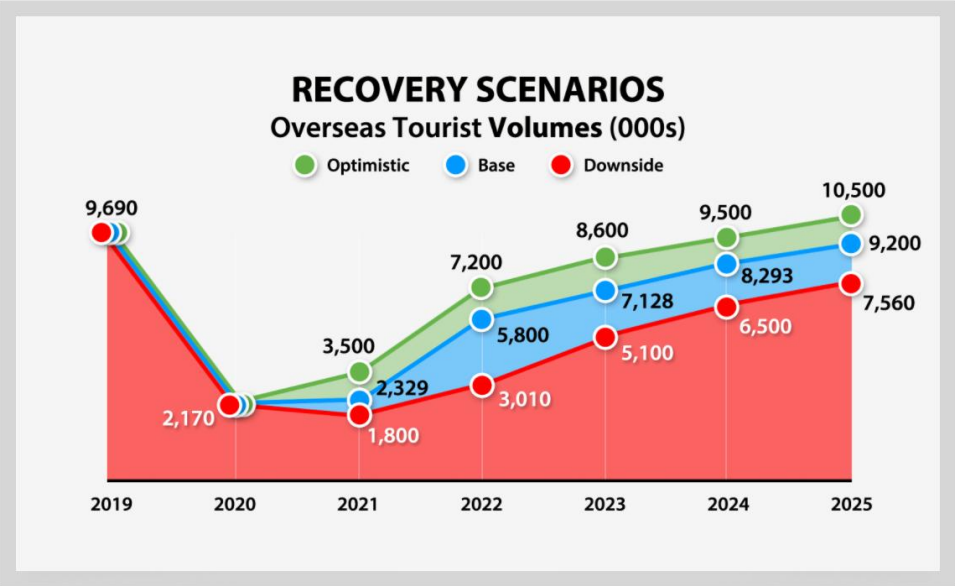
For the purposes of this study, we have sought to apply **Scenario B** – which is held as the most likely path towards recovery by 2025.

Figure 4-15 and Figure 4-16 display these forecasts at national level for both tourist volumes and revenue.

[20] Reference sources: IATA; EuroControl; ACI; McKinsey; UNWTO;WTTC; HSBC; Bain & Company; Tourism Economics; OAG. In-depth interviews with 10 top industry executives (mid Dec.'20-mid Jan.'21); ITIC survey of member organisation (mid Dec.'20)

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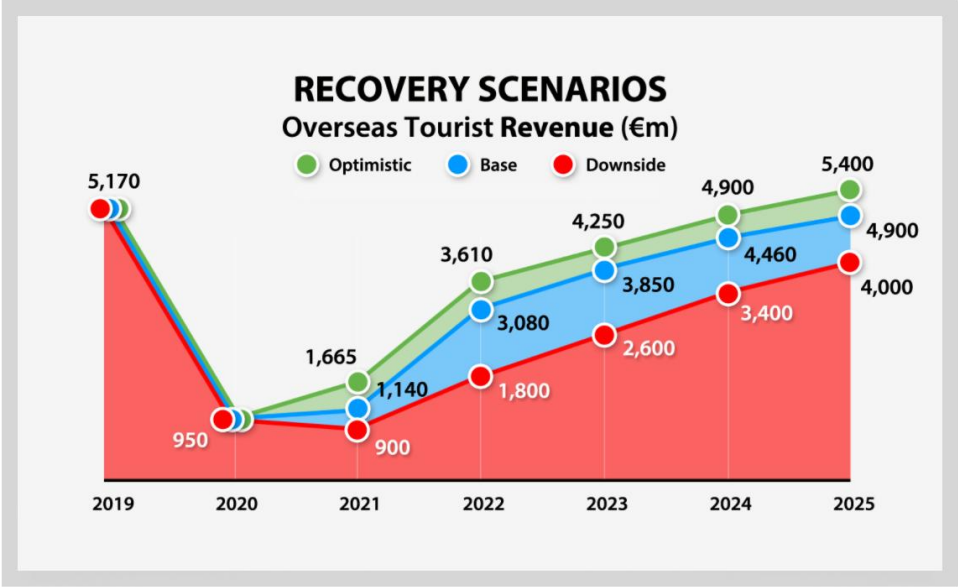
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TOURIST NUMBERS vs. 2019 Index=100	Scenario A OPTIMISTIC	Scenario B BASE CASE	Scenario C DOWNSIDE
2019	100	100	100
2020	22	22	22
2021	36	24	18
2022	74	60	31
2023	89	74	53
2024	98	85	67
2025	108	95	78

GROWTH RATES year-on-year	Scenario A OPTIMISTIC	Scenario B BASE CASE	Scenario C DOWNSIDE
2020	-78%	-78%	-78%
2021	61%	7%	-18%
2022	105%	150%	67%
2023	20%	22%	69%
2024	10%	16%	27%
2025	10%	11%	16%

Figure 4-15: ITIC's outlook of recovery scenarios – tourist volumes (000s)



TOURIST REVENUE vs. 2019 Index=100	Scenario A OPTIMISTIC	Scenario B BASE CASE	Scenario C DOWNSIDE
2019	100	100	100
2020	18	18	18
2021	32	22	17
2022	70	60	35
2023	82	74	50
2024	95	86	66
2025	104	95	77

GROWTH RATES year-on-year	Scenario A OPTIMISTIC	Scenario B BASE CASE	Scenario C DOWNSIDE
2020	-82%	-82%	-82%
2021	75%	20%	-5%
2022	117%	170%	100%
2023	18%	25%	44%
2024	15%	16%	30%
2025	10%	10%	18%

Figure 4-16: ITIC's outlook of recovery scenarios – tourist revenue (€m)

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Gauging the impact of inflow expenditure brought about by tourism locally is of key importance in modelling for future floorspace requirements. The incorporation of assumed levels of expenditure are set out in Chapter 6 in this regard, however, in order to localise the ITIC recovery scenario to the local study area itself, historic data on the number of visits by overseas and domestic tourists and revenue estimates at County level have been collated.

This data is sourced through a combination of publications by the Central Statistics Office, Fáilte Ireland and other sources. Specifically, a baseline for historic years 2013 to 2017[21], 2018 in part[22] and for 2019[23] have been collated at County scale across the study area.

Tourist Visits in 2019:

- Limerick City and County:
  - 602,000 overseas visits | 349,000 domestic visits | 951,000 total.

Tourist Revenue in 2019:

- Limerick City and County:
  - €254m overseas spend | €51m domestic spend | €305m total.

The ITIC scenario was then applied to estimate the return in revenue between 2020 and 2025. Beyond 2025, an assumed 5% rate of growth to overseas visitors and revenue was incorporated. This reflected a conservative outlook, supported by median historic growth rates of 6-7% in visitors and 5-11% in revenue across the study area.

On the domestic front, due to high variability in tourist visits and revenue historically, as well as the absence of a clear recovery scenario published by the industry at this time, a conservative phased recovery of 33% of 2019 levels by 2022, 75% by 2022 and 95% by 2023 has been assumed. This reflects an assumed take up of tourism stays following the rollout of the vaccination programme, as well as levels of accrued disposable income available to households as reported by the Central Bank.[24] A conservative 1.5% annual rate of growth from 2024 is assumed, supported by historic growth rates of 7-9% in visitors and ~5% revenue across the study area.

These headline figures represent an estimate on total tourism spend, however, for the purposes of this study, only a portion are brought forward for consideration as inflow relevant to the assessment of future retail floorspace needs, specifically spend on convenience and comparison non-bulky goods.

In 2019, approximately 13% of tourism spend is on 'shopping', with another 37% on 'other food and drink'[25]. Assuming no more than a third of spend in the other food and drink category would be in convenience outlets (vs. restaurants and pubs, etc.), a

[21] *Limerick Tourism Development Strategy: Situation Analysis Report 2019-2023*. Limerick City & County Council

[22] A figure for 2018 was not available at time of preparation for Limerick

[23] Figures for 2019 provided directly with thanks to Fáilte Ireland.

[24] Vol 2021, No.4, Saving during the pandemic: Waiting out the storm? (Reamonn Lydon and Tara McIndoe-Calder) (centralbank.ie)

[25] Key-Tourism-Facts-2019. Fáilte Ireland

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reduction to total expenditure across the study area has been produced to establish an estimate on expenditure inflow for the retail categories of interest only.

Finally, an assumed distribution has been developed in order to further localise this spend down to specific retail catchment area scale. The figures as set out in Table 4.4 were based on a review of tourism attractions in each catchment area, as well as the ordering of the settlement hierarchy, e.g. the influence of and attraction to urban areas, including Limerick City, while recognising some of the tourist sites in Clare. Though this cannot be supported due to a lack of officially published granular data, it is believed to present a realistic reflection of what the distribution may be as of 2019.

Table 4.4: Tourist Spend: Assumed Split by Catchment Area

Tourist Spend: Assumed Split by Catchment Area		
Catchment Area	**% of Tourism Relevant Revenue**	
	% of Clare	**% of Limerick**
Limerick Catchment (*spans parts of Co. Clare, see Section 6.1.2*)	20%	80%
Newcastle West Catchment	-	20%
Total Assumed Revenue	**20%**	**100%**

A breakdown of these figures, as well as the proportions used per catchment area per annum across the Plan period, are set out in greater detail in Appendix A.7.

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5 Town Centre Health Checks

5.1 Overview

This chapter provides detailed analysis of each of the study areas settlements in County Limerick and Limerick- Shannon Metropolitan Area as identified by the retail hierarchy. These are Limerick City, Shannon and Newcastle West. In addition, the Crescent Shopping Centre, Parkway Shopping Centre, Parkway Retail Park, Childer's Retail Park, Eastpoint Business Park, City East Retail Park, Jetland Shopping Centre, Castletroy Shopping Centre and Roxboro Shopping Centre are also assessed given their district importance resulting from their geographical location and retail function. Utilising both qualitative and quantitative methods, the health checks provide a useful insight into each of the settlements' Town Centres with a specific focus on retail performance and potential. It is important to note that the health checks were carried out during the impact of the COVID-19 Pandemic on the Irish economy.

The health checks will use the following indicators of viability and vitality as prescribed by the Retail Planning Guidelines (2012):

— Attractions;

— Accessibility;

— Environmental Quality and Amenity;

— Perception of Safety and occurrences of crime;

— Diversity of uses;

— Multiple Representation;

— Levels of Vacancy; and

— Shopping Rents and Commercial Yields.

The health checks for the study areas include a series of recommendations for actions to sustain and improve the performance of each town in sustaining a healthy retail sector. Land use surveys carried out as part of this strategy have been used to analyse indicators such as diversity of uses, multiples representation and levels of vacancy. It has also provided a mechanism to quantify the amount of the retail shopping types (comparison, convenience, bulky goods) within the town study areas, as well as the quantum of other commercial uses and vacancies.

Supplementary to the core elements of the Health Check Analysis referred to above, are the outcomes of consultations held with retailers and representative groups of each of the study areas. The results of telephone and online surveys also provide an important indicator of the vitality, vibrancy and customer experience of the retail centres. This is particularly the case for this strategy, as the capacity to undertake on-street consumer interviews and pedestrian counts was negated by the imposition of governmental 'lock-down' on movement, which particularly impacted on the operation of retail. The findings that emerged from both the consultations have been used to inform the

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recommendations set out for each town and to confirm and/or redefine the core retail area, the identification of opportunity sites and the formulation of planning policies as set out in Section 7.

5.2 Consultation

In the preparation of this study, several stakeholder consultations were undertaken with Town Centre retail groups, commercial retail developers, Council representatives and retail market specialists for the area.

The following comments were noted:

- All contributors agreed that a thriving and vibrant Limerick City Centre is vital for both the general economy of the region as well as attracting investment.
- An attractive City Centre is needed for all stakeholders, not just in retail, but for industry and their employees making investment decisions to locate in and around the City.
- There has been relatively little development in retail over the last 10 years. Investment has largely been in food and beverage (convenience).
- All convenience retailing has experienced significant challenges as a result of lockdown measures and prevention from physically trading.
- Convenience retailers have thrived during the lockdowns.
- Limerick City Centre has a very small prime retail core based around 2 anchor blocks (Penneys and Brown Thomas).
- A combination of low rents and high construction costs makes development in secondary locations largely unfeasible.
- In the short-term, global market conditions entail that investment in significant new retail anchor-based development will be challenging in any location. The proportion of retail floorspace is likely to be reduced in favour of mixed-use development with higher residential and services content in particular.
- Limerick City Centre is very accessible and has good parking. However, it is too limited in its hours of activity. Partly as a result of the ease of commuting to a broad catchment area, the City Centre empties after the working day.
- The City Centre must expand its role as a multi-functional destination for living/lifestyle, leisure, culture, food and drink, services and education.
- Short-term immediate initiatives are needed to encourage people to visit the City and Town Centres, particular out-door food and beverage and street market offer.
- Pedestrian streets need to be made work where it is in operation before expanding. Expansive pedestrianisation is not considered essential to City Centre retail.
- Streets need better identity as to their function and character. Independent operators have a significant role in developing character and distinctiveness of City Centre offer.
- Limerick City retailer and business groups have a resilient outlook and have formed an effective and outward looking partnership that adapts to challenges and needs in a proactive manner. Development of the partnership and improved relationships with the Local Authority is vital going forward.
- Retailers and landlords should engage in preparing a simple ‘Retail Charter’ where established and new operators sign-up to qualities and standards.
- The evening and night-time economy need to be enhanced and improved.

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- Residential population growth is essential to the City Centre's vibrancy and health.
- Conservation challenges – The Local Authority should be proactive in helping people invest in City Centre properties (particularly historic) and bring in feasible measures and support to address fire regulations and conservation restrictions to support City Centre living.
- Limerick City Centre has received €116m in URDF funding – a significant public investment that will encourage City Centre living and investment.
- Retail Parks were experiencing decline up to 2020, but in some cases the pandemic and associated lockdown have helped these operators via 'click and collect'.
- Polycentric neighbourhoods where people live, work and shop is not happening.
- There is a need to allow for upgrading and limited expansion of the Regional and District Shopping Centre. Absolute caps on retail floorspace would be damaging as it prevents investment.
- The restriction of retail/commercial investment in one location does not automatically mean it will happen in the City Centre.
- Prior to the pandemic and associated lockdown, CSO data showed that retail expenditure in Ireland was growing quite healthily.
- With low consumer spending over last year there is an increased chance of retail 'bounce-back'.
- When retail reopened after lockdown in 2020, a significant level of online sales immediately reverted to physical stores (based on Revolut data). It is considered that footfall was at 80% of normal levels. This reflects that the older generation stayed at home. It also reflects that there is a social and community aspect to shopping trips. This suggests trade can recover when lockdowns are lifted.
- The experiential aspect of physical retail (for comparison) remains very important for consumers.
- Retailing has become increasingly omni-channel.
- Retailers that are localised can do well. Particularly those that adapted to new online and delivery channels.
- In Newcastle West the retail core is an important service centre. 'Boutique' retailing has emerged.

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5.3 County Limerick and Limerick Shannon Metropolitan Area

5.3.1 Limerick City

5.3.1.1 Introduction

Limerick City is situated on the River Shannon and is the largest urban settlement within the Mid-West region with the 2016 census recording a population of 94,192. The historic core of the City is located on King's Island which is bound by the River Shannon and River Abbey. The City is located at the foot of the Shannon Estuary and has excellent public transport links which connect the City to settlements in the region via rail and bus links. The City Centre has an historic grid structure.



Figure 5-1: Dunnes Stores (Harvey Quay) Shopping Centre from Bedford Row (Source Film.limerick.ie)

The core retail area is situated to the south of the River Shannon and is bound to the north by Charlotte's Quay, to the west by Harvey Quay/Bishop's Quay, to the south by Mallow Street and extends out west as far as Cathedral Place. The principal street within the City Centre is O'Connell Street which transverses the study area. Notable retail streets in the area include Henry Street, Roche's Street, Sarsfield Street and William Street. Retail provision in the City Centre is primarily comparison goods and contains more individual shops than any other centre in the Mid-West region. Bedford Row (Figure 5-1), Thomas Street (north) and Little Catherine Street (Figure 5-2) have become fully pedestrianised. Along these streets' active frontages, enhanced public realm and a mix of uses has helped contribute to the vibrancy of these streets.

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Figure 5-2: Little Catherine Street (Source Film.limerick.ie)

5.3.1.2 *Attractions*

As the most important retail and commercial centre within the County, Limerick has multiple attractors. The wide-ranging retail (convenience and comparison) and commercial offerings within the City Centre ensure that it acts as the primary service centre, for both locals and residents from surrounding towns and settlements. The Milk Market is a notable example which attracts many local retails and visitors and has been in existence since 1852. This reliable consumer base provides a strong foundation to the City's retail and commercial activities during business hours.

The evening and night-time economy is a further attraction to Limerick City, this having been recognised by being awarded Purple Flag[26] status in 2017. The focus of this nightlife is primarily concentrated towards the City's Market Quarter, however the various other pubs, restaurants and theatres interspersed throughout the City also add to its credentials as an evening venue. The City's rich cultural heritage and food and wine scenes are also major attractions.

The City offers numerous high-quality public open spaces for visitors and locals to enjoy and is a popular walking spot. There are plenty of rest points along the quays with several seating areas complemented by attractive landscaping, street furniture and lighting. Recent public realm improvements are aimed at revitalising the City Centre experience and optimising the potential of the waterfront with Bedford Row and Harvey's Quay being

[26] https://limerickchamber.ie/lets-paint-the-town-purple-as-limerick-awarded-prestigious-purple-flag-for-evening-and-night-time-economy/

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notable examples. The People's Park and Arthur's Quay Park are attractive parks which are utilised by many locals and tourists.

The Belltable and Limetree theatres both serve as attractors to the City Centre and helps demonstrate the quality of the musical and artistic offering of the City. This is coupled with The Hunt Museum, The Limerick Museum and Ormston House, a contemporary art gallery and culture resource centre and the Limerick City Gallery of Art, which is housed in a Romanesque Revival building and is home to artists, sculptors and craft makers.

Other attractions include King John's Castle (Figure 5-3). This 13th century castle is located along the River Shannon and is a popular tourist attraction within the City. Parts of the complex now serve as exhibition rooms. In addition, there's a video display, information about the excavation of Viking houses, defensive works and siege tunnels. Thomond Park is key sporting venue in Limerick which is the home of Munster Rugby. The famous venue, renowned internationally for its unique history and atmosphere, underwent redevelopment in 2007 and now has a capacity of 25,600 plus an extensive range of conference and banqueting facilities.



Figure 5-3: St King John's Castle (Source: Irish Times)

5.3.1.3 *Accessibility and Pedestrian Flows*

Limerick City is linked to Dublin via the M7/N7, Cork by the N20/M20 and Galway by the N18/M18/M6. The City is also connected to cities and other settlements by rail and bus networks. The intercity rail network provides access to the nearby settlements of Ennis, Galway, Tralee, Killarney, Cork and Waterford. The service also provides a direct link to Dublin. Bus Eireann provides multiple routes in and out of the City, linking it to numerous settlements across Ireland. The Local Link provides a regional bus service for County Limerick and links the City to many rural locations.

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There are also several taxi and hackney firms in operation in the City. Car parking provision within the City Centre comprises a mix of on street parking, surface car parks and multi-storey car parks located throughout the City. Notable car parks include Howley's Quay car park, Q-park Harvey's Quay and Arthur's Quay car park.

A number of streets have become fully pedestrianised which has increased pedestrian accessibility between many streets within the urban core. Bedford Row, Thomas Street and Little Catherine's Street have become pedestrianised, which has created an interconnected vibrant area for shopping and dining.

Footfall data was not available due to government lockdown restrictions on the normal operation of retail during the study period.

5.3.1.4 Environmental Quality and Amenity

The public realm has been enhanced throughout Limerick City in recent years, with improvements made to streets, open spaces and the waterfront. Notable areas include Bedford Row, Thomas Street, O'Connell Street, Harvey's Quay, The Bishop's Quay, Peoples Park and Arthur's Quay Park.

The River Shannon, River Abbey and City canal are important natural features and have helped to define Limerick's spatial structure. The River Shannon defines the north-eastern boundary and continues south to divide the City into two halves, forming the dominant physical landscape feature through the centre of the City. The waterways throughout the City provide many functions including:

- Visual amenity for the City as a whole;
- Allow for the provision and enhancement of open space, public amenities and linkages;
- Provide for the preservation and enhancement of wildlife habitats and natural corridors;
- Provide opportunities for waterfront developments, new recreational facilities and leisure activities;
- Provide opportunities for tourist related development;
- Provide for drainage and flood water storage.

The City also has a strong presence of green infrastructure with many trees and parks making a valuable contribution to the landscape, local visual amenity and biodiversity of Limerick City. The green infrastructure incorporated into the City has helped to reduce carbon dioxide as well as enhancing the aesthetics of the built environment and public realm within the City.

The primary retail streets have an attractive and enjoyable streetscape with the majority of shop fronts in the core retail area well presented with a mix of both contemporary and traditional style Shopfronts. The prominence of ecclesiastical buildings throughout the City Centre also serves to add to the architectural character of Limerick City, which contributes to the attractiveness and environmental quality of the City Centre. Well known examples include Limerick City Church on Dominic Street and St. John's Cathedral on Garryowen Road.

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5.3.1.5 *Perception of Safety*

On the day in which the health check was conducted Limerick City Centre felt like a safe environment in which to navigate. The main streets and the various streets which radiate out are all well surveyed during daytime business hours. However, as with all City Centres, a few secondary streets which do not have a strong retail presence, possess a reduced level of natural surveillance.

There are some well used pedestrian passageways throughout the City Centre. However, the City contains numerous narrow backstreets like Little William Street and Theatre Lane, which have little by way of active frontages to provide a sense of surveillance.

5.3.1.6 *Diversity of Uses and Multiple Representation*

The building survey of retail units for this strategy indicates that Limerick City has a good diversity of retail uses. Comparison retail dominates the retail use (by unit) types in the town occupying 73% of all units surveyed. 26% of units are occupied by convenience retail good stores with 1% selling bulky goods.

The City Centre is dominated by small comparison retail units, but also includes large comparison retailers like Brown Thomas Department Store, Penneys and Dunnes Stores. Arthur's Quay Shopping Centre contains multiple small comparison retail units and is anchored by a large Tesco superstore. The City has a good range of retail and services on offer. Services include, banks, post offices, hotels, restaurants and bars. However, compared to other provincial cities it has a relatively limited retail offer.

Table 5.1: Diversity of uses within Limerick City Centre

Limerick City Centre	No. of Units	Unit (%)
Bulky	2	1%
Comparison	136	73%
Convenience	48	26%
Grand Total	186	100%

Table 5.2: Overall retail vacancy within Limerick City Centre

Limerick City Centre	No. of Units	Unit (%)
Vacant Units	220	22%
Total Units	1,014	100%

5.3.1.7 *Levels of Vacancy*

The retail study area of Limerick City Centre has a current vacancy of 22% as shown on Figure 5-4. Almost all streets within the City Centre contain some level of vacancy. The majority of the vacant sites are small scale, however there are some large vacant sites

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including the old Debenhams site along O'Connell Street. Vacancy rates appear to be higher on the edges of the study area. In consolidating the retail offering, appropriate planning policies should be adopted with a focus on increasing the potential for occupancy of vacant units within the study area.

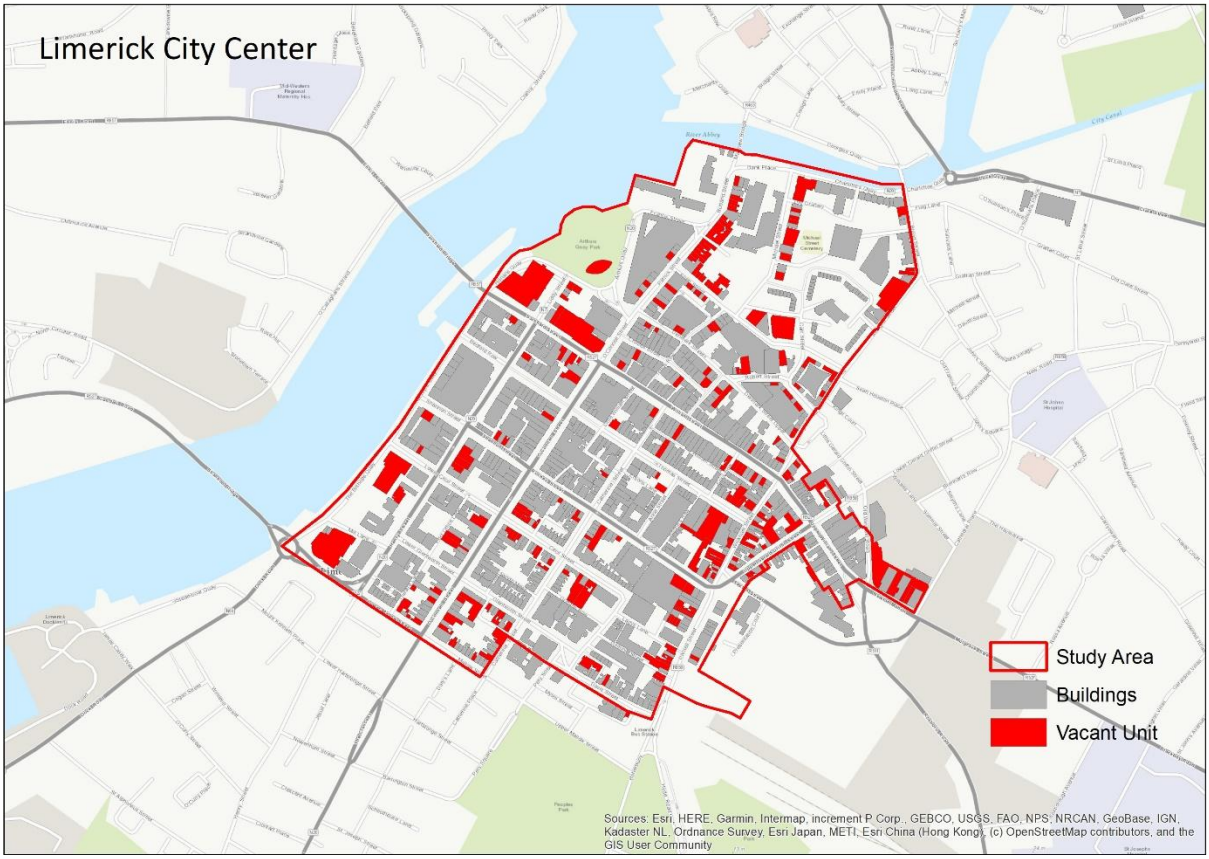


Figure 5-4: Vacant retail units in Limerick City

5.3.1.8 *Shopping Rents and Commercial Yields*

Retail units located within the prime 'Zone A' retail streets are considered to achieve rents in the region of €870 per square meter, based on an analysis of the market in Q1 2021. Typical high street units would have a commercial yield in the region of 8%[27]. Other specific factors such as size, characteristics and number of tenants sharing the building etc. can further impact values.

5.3.1.9 *Key Actions and recommendations*

Overall, given global circumstances, Limerick City appears to be performing satisfactorily and fulfilling its role as the primary retail centre of the County. Pedestrianised streets offer a pleasant shopping environment and a relatively good choice of convenience and comparison retail outlets is on offer to consumers. However, improvements can be made to sustain the vitality and viability of the City Centre as set out below:

[27] Source: Cushman & Wakefield Research Q1 2021

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- Consider pedestrianisation and public realm improvements (new attractive hard landscaping) to encourage pedestrian activity within the core retail area. This could be trialled initially to determine its success.
- Maintain the vitality and viability of Limerick City Centre by consolidating the core retail area to ensure any future retail development is directed towards this area in the first instance.
- Encourage and facilitate the reuse of vacant buildings or under-utilised sites throughout the City Centre, with a focus on brownfield sites.
- Consider improvements to the public realm within the City Centre, waterfront and consider improving pedestrian linkages to create a more pedestrian friendly environment.
- Promote access to Limerick's historic core through improved signage/street maps to make visitors aware of the presence and location.
- Incentivise owners to make improvements to their buildings/shopfronts within the retail core through grant funding via the 'Business and Retail Incentive Scheme'.
- Adopt a pilot programme for the extension of opening hours to allow for late night shopping within the retail core. For the pilot project, this could be scheduled to take place alongside one of the City's major festival/events which will support the night-time economy.
- Undertake an access audit of the built environment to seek to improve accessibility within the City for people with disabilities.
- Support the retail charter for operators and landlords to sign-up to high quality goals for retail in the City Centre.
- Support synergy with non-retail uses that attract footfall to the City Centre.
- Work to define character areas and invest in marketing campaigns to communicate a broad City Centre experience to attract visitors and consumers.
- Develop multi-channel synergy between retail, service and cultural offer of the City Centre.

5.3.2 Newcastle West

5.3.2.1 Introduction

Newcastle West is the County Town of Limerick, located approximately 45km south west of Limerick City. Newcastle West lies on the Arra River and adjacent to North Kerry. The national route, the N21 Limerick to Killarney road, traverses the town. Newcastle West has received investment from companies which will increase population and boost retail in the town. The town has displayed strong population growth since 1991 with a 54% increase to 6,619 by 2016.

The town was developed along the banks of the River Arra. Today, Newcastle West has a vibrant Town Centre with markets taking place in the well-established square. The surrounding streets have a similar architectural style to the square, with a continuous traditional townscape of 2-3 storey buildings.

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5.3.2.2 Attractions

Newcastle West serves a wide catchment area as a service centre which acts as its primary attractor. In that regard, it serves a very important function, accommodating the needs of a large surrounding rural hinterland.

Newcastle West is an attractive town with the Castle Demesne parkland of over 100 acres set in a secluded location within walking distance of the Town Centre. The Demesne provides a variety of leisure, play and sporting facilities for all to enjoy.

Within the town, is the restored medieval complex known as Desmond Hall (13th century castle). Additionally, The Limerick Greenway is a popular recreational trail which is ideal for walking, cycling and hiking. This 40km greenway connects Newcastle West to the settlements of Rathkeale and Abbeyfeale and extends into Kerry.

5.3.2.3 Accessibility

Newcastle West is served by the N21 Limerick to Tralee national route on the northern bank of the River Arra. This national road also connects Newcastle West to the towns of Adare, Rathkeale, Abbeyfeale and Castleisland. Regional roads provide accessibility to nearby settlements within Limerick and Cork including Foynes (R521), Killmallock (R520) and Charleville (R522).

Bus Eireann operates three routes which currently serve Newcastle West. These routes connect Newcastle West to settlements within County Limerick and County Kerry including Limerick City, Adare, Killarney and Tralee. The Local Link bus network as illustrated on Figure 5-5 also operates from Newcastle West, which connects the town to many settlements throughout Limerick. The Limerick Local Link service area provides links to settlements in County Cork.

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Figure 5-5: Limerick Local Link Network (Source: Local Link)

There are numerous car parking areas within Newcastle West. Car parking is available on almost all streets, which include Market Square and Lower Maiden Street. A large car park exists along Market Yard which can be accessed by Bishop Street and Scanlon's Lane.

Footfall data was not available due to government lockdown restrictions on the normal operation of retail during the study period.

5.3.2.4 Environmental Quality and Amenity

Newcastle West benefits from its location on the banks of the River Arra, which is valued as a natural habitat. Along the river there are a number of impressive tree groups and seating is available. The Limerick Greenway provides a high-quality recreational trail. This 96km greenway improves connectivity to other nearby settlements and stretches into northern Kerry. Within County Limerick, approximately 40km of the greenway has now been developed for off road walking and cycling from Rathkeale to Abbeyfeale. The route makes its way through the West Limerick countryside, giving users opportunity to stop off in towns and villages along the route which includes Newcastle West. This route runs along a disused railway line.

The town has a strong built heritage with a large number of structures on the Record of Protected Structures. The Market Square is an attractive area of public realm which includes seating, green infrastructure, a freestanding limestone monument and serves

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as a space for a local market. The monument was installed in 2005 and '*commemorates the rich heritage of Newcastle West, paying particular attention to the cattle and butter markets that once took place within the Square. A finely cast-bronze statue is one of the decorative highlights of this monument, projecting an interesting image of rural Ireland'*. [28]



Figure 5-6: Monument located on Market Square (Source National Inventory of Architectural Heritage)

Overall, the town has a vibrant atmosphere and is relatively litter free, however Maiden Street has numerous vacant units, some of which have become derelict. This narrow street leads directly onto the market square and is in need of urban renewal.

5.3.2.5 Perception of Safety

On the day in which the health check was conducted, Newcastle West appeared quite vibrant and therefore the perception of safety and surveillance was high. The Market Square and Market Place were well observed during daytime business hours, while the complimentary cafe/restaurant offerings throughout the town ensures it retains surveillance into the evening. However, as with all Town Centres some secondary streets

[28] https://www.buildingsofireland.ie/buildings-search/building/21837031/cailin-deas-cruite-na-mbo-ella-the-buttermaker-the-square-gortboy-newcastle-west-limerick

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which do not have a strong retail presence possess a reduced level of natural surveillance.

5.3.2.6 *Diversity of Uses and Multiple Representation*

The core retail area is situated around the square, Bridge Street, Bishop Street and Maiden Street. The town benefits from a wide variety of retail shops and services which support the local population. The Town Centre is predominantly commercial/retail use with residential properties surrounding. Newcastle West has an extensive range of comparison shops. Some units along this road and Maiden Street have remained vacant for a considerable amount of time. A large Tesco, Aldi and Supervalu stores are located within the town settlement.

The centre also benefits from an extensive service sector which include hair dressing, dry cleaners, travel agents and an extensive commercial sector. There is also a good range of restaurants and bars, which give the town a prosperous appearance.

Table 5.3: Diversity of uses within Newcastle West

Newcastle West	No. of Units	Unit (%)
Bulky	3	6%
Comparison	37	69%
Convenience	14	26%
Grand Total	54	100%

Table 5.4: Overall retail vacancy within Newcastle West

Newcastle West	No. of Units	Unit (%)
Vacant Units	29	12%
Total Units	235	100%

5.3.2.7 *Levels of Vacancy*

Newcastle West has prominent vacancy clusters on Maiden Street as shown in Figure 5-7. Along Maiden Street there were signs of many buildings becoming derelict giving the street a dilapidated feel compared to the rest of the Town Centre. Newcastle West has an overall vacancy rate of 12% with the Market Square and north east of the town recording low vacancy levels.

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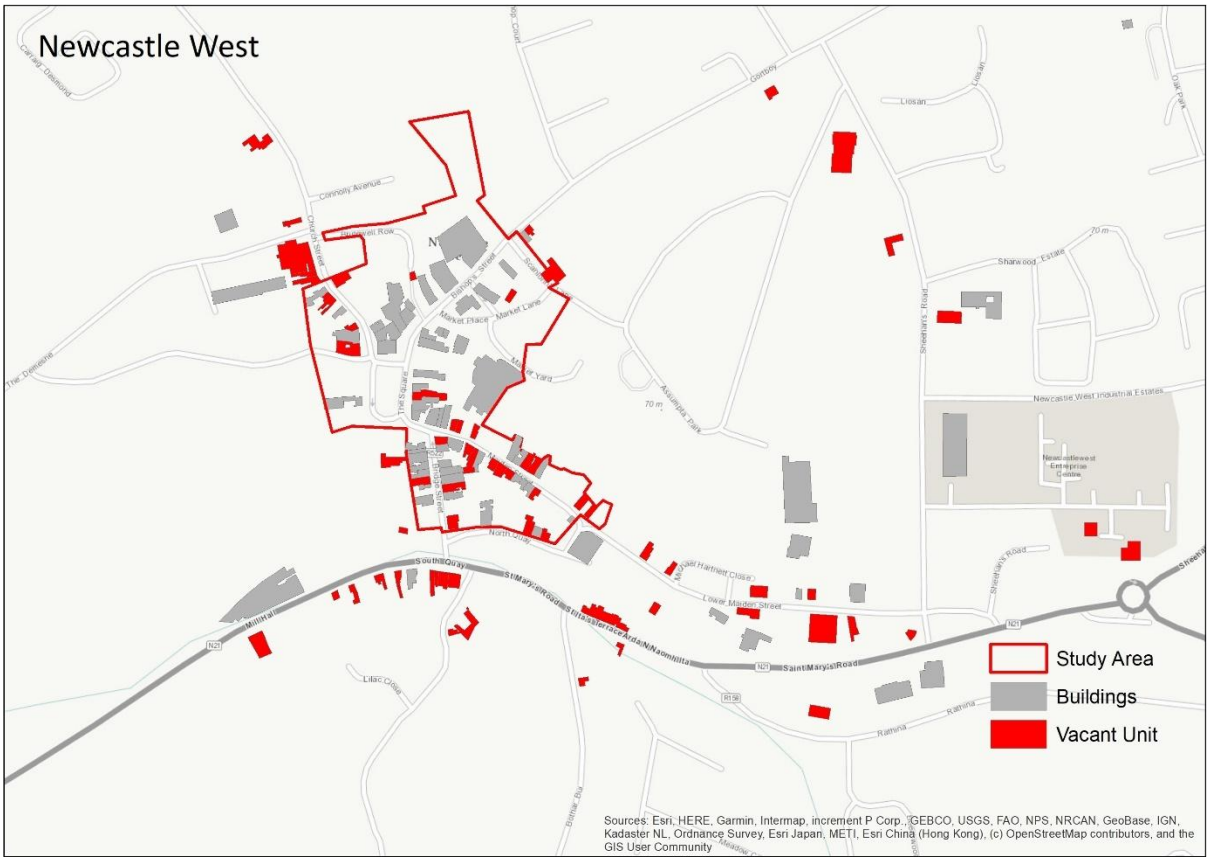


Figure 5-7: Newcastle West Vacant Retail Units

5.3.2.8 Key Actions and recommendations

Newcastle West appears to have a relatively resilient retail sector with a strong offering and good reputation for comparison retail. Newcastle West has a pleasant and well-maintained public realm, however some areas within the Town Centre are in need of rejuvenation, especially along Maiden Street. Recommendations to further enhance Newcastle West's attractiveness and appeal as a retail destination are set out below:

- Encourage reuse of derelict sites in Newcastle West.
- Build on Boutique-offer and relationship of town with its local catchment area.
- Consider introduction of a Business Incentive Scheme to encourage the use of vacant commercial premises within Newcastle West. This incentive scheme will seek to assist new commercial businesses to set up in the traditional retailing, commercial hubs of the town.
- Improve the quality of the public realm at Market Square, by considering the removal of some parking spaces and provide more public benches to the square to encourage rest and relaxation.
- Implement a specific yearly cleaning and maintenance programme for public spaces within the core retail area to improve the pedestrian experience (remove gum, pressure wash paving etc.).
- Continue to support the established festivals and events that take place within Newcastle West and consider opportunities for further events.

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— Consider the use of events and popup markets (at the square) to generate a buzz around the Town Centre.
— Support the work and objectives of the Newcastle West Tidy Town's team.

5.3.3 Shannon

5.3.3.1 *Introduction*

Shannon is the second largest town in County Clare with a population of 9,729 according to the 2016 census. The town is located on the River Shannon, which forms part of the southern boundary of the County. Shannon Town developed from the 1960s in response to the growth of Shannon International Airport and the Shannon Free Zone. The town has strong accessibility links to the cities of Limerick, Cork and Galway and is approximately midway between Limerick and Ennis, the two largest shopping destinations in the Mid-West Region.

5.3.3.2 Attractions

Shannon has the potential for enhanced tourism given its attractive location along the Atlantic corridor and accessibility to Shannon International Airport. The Atlantic Air Adventures centre is a popular tourist attraction in the town which is an aviation education and flight simulation visitor centre. It includes a wide range of packages including family days out, school excursions and tours, as well as facilitating individual visitors, birthday parties, corporate events and providing flight simulator training, field trips and aviation displays. The centre also provides aircraft technical services training in conjunction with Limerick Institute of Technology.

Other attractions in the area include Balleycasey Craft and Design Centre, Shannon Golf Club and the new Omniplex cinema, which is located at the Skycourt Shopping Centre.

5.3.3.3 Accessibility

The road network serving Shannon comprises the N19 and N18 National Primary Routes that connects the town to Limerick City, Ennis and Galway. The regional R471 connects Shannon to Sixmilebridge. The Limerick Tunnel has enhanced accessibility between Shannon and Limerick City since its opening in 2010. This tunnel is manned by a toll bridge.

There are good quality public transport bus linkages connecting the town to major urban centres and to local in-County destinations. Bus Éireann provides a local bus with two routes serving Shannon. Bus Éireann also runs the highest frequency direct services to and from Shannon Airport with over 130 services passing through the airport every day. These routes provide direct access to the settlements of Limerick, Cork, Galway and Ennis. The Local link bus services connect Shannon to the settlements of Ennis, Scariff, Clarecastle, Newmarket On Fergus, Feakle, Bodyke, Sixmilebridge, Tuamagraney and Broadford.

There is ample parking within Shannon Town Centre. Parking is concentrated around the Skycourt Shopping Centre, which contains a multi-storey car park. Car parking is also available within the Elite Business Park.

Shannon International Airport is the third busiest in Ireland and recorded passenger numbers of 3.6 million at its peak. The airport provides a gateway to Shannon and the west of Ireland. The airport provides many international routes, including the most

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popular routes in Europe and North America. The airport has a history of pioneering in global aviation with the first transatlantic flight in 1945 and also contained the world's first duty free store. Shannon International Airport also contains a large car park with over 5,000 spaces and car hire is available.



Figure 5-8: Shannon Airport (Source Clare FM)

Footfall data was not available due to government lockdown restrictions on the normal operation of retail during the study period.

5.3.3.4 *Environmental Quality and Amenity*

The environmental quality of Shannon is influenced by attractive open spaces and landscaping. Examples of positive aspects of environmental quality include the Town Centre Woodland Area and the Shannon Estuary. The woodland area is an important space and forms part of a circulation route, linking the Town Centre with the school and leisure centre and also the Shannon Estuary via the wetlands area. The site now supports a significant woodland resource of mature deciduous trees. The Shannon Estuary provides important habitat for overwintering wildfowl and waders. Other habitats include estuaries, lagoons, salicornia and other annuals colonising mud and sand, Atlantic salt meadows and Mediterranean salt meadows.

Other important amenity spaces include Shannon Allotments and lands in the vicinity of Hastings Cottage, Drumgeely Hill and the open space/wooded area west of Cluain Airne. There are some community facilities within Shannon including Shannon Town United AFC Camogie Club, Athletics Club, St. Senan's Rugby Football Club, Aras Wolfe Tones na Sionna GAA, the Shannon Model Flying Club and soccer pitches.

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5.3.3.5 *Perception of Safety*

On the day in which the health check was conducted, Shannon appeared to offer a good experience and secure town environment. The main shopping district had a high level of surveillance which diminished somewhat away from the Town Centre.

5.3.3.6 *Diversity of Uses and Multiple Representation*

Skycourt Shopping Centre is the core retail district within Shannon Town. It is primarily a comparison shopping destination with a relatively extensive range of comparison shops. The shopping centre is anchored by a large Dunnes Stores which acts as a main food shopping destination and also sells a widespread range of clothing. A Lidl supermarket is situated in the Skycourt shopping area. In addition to shopping, the centre provides banking facilities, a library, a post office and restaurants.

Opportunities exist for redevelopment of the existing Town Centre. Providing additional retail development can enhance the quantity and quality of retail on offer. Clare County Council has produced a Masterplan which proposes to extend the Town Centre to the north of Skycourt. This new area known as the Shannon Special Development Area will provide additional retail and services to complement the existing Skycourt Shopping Centre.

Table 5.5: Diversity of uses within Shannon

Skycourt Shopping Centre	No. of Units	Unit (%)
Bulky	1	5%
Comparison	13	68%
Convenience	5	26%
Grand Total	19	100%

Table 5.6: Overall retail vacancy within Shannon

Skycourt Shopping Centre	No. of Units	Unit (%)
Vacant Units	17	34%
Total Units	50	100%

5.3.3.7 *Levels of Vacancy*

The Skycourt Shopping Centre reported high levels of vacancy. Overall, there were 17 vacant units recorded within the shopping centre. Some corridors within the shopping centre were predominantly vacant with other shops boarded up and covered in artwork. This suggests that they have been vacant for a considerable amount of time. As seen in Figure 5-9, the initial desktop assessment of Shannon Study Area did not allow the distinction and identification of individual vacant units. Vacancy was subsequently confirmed through physical site inspections.

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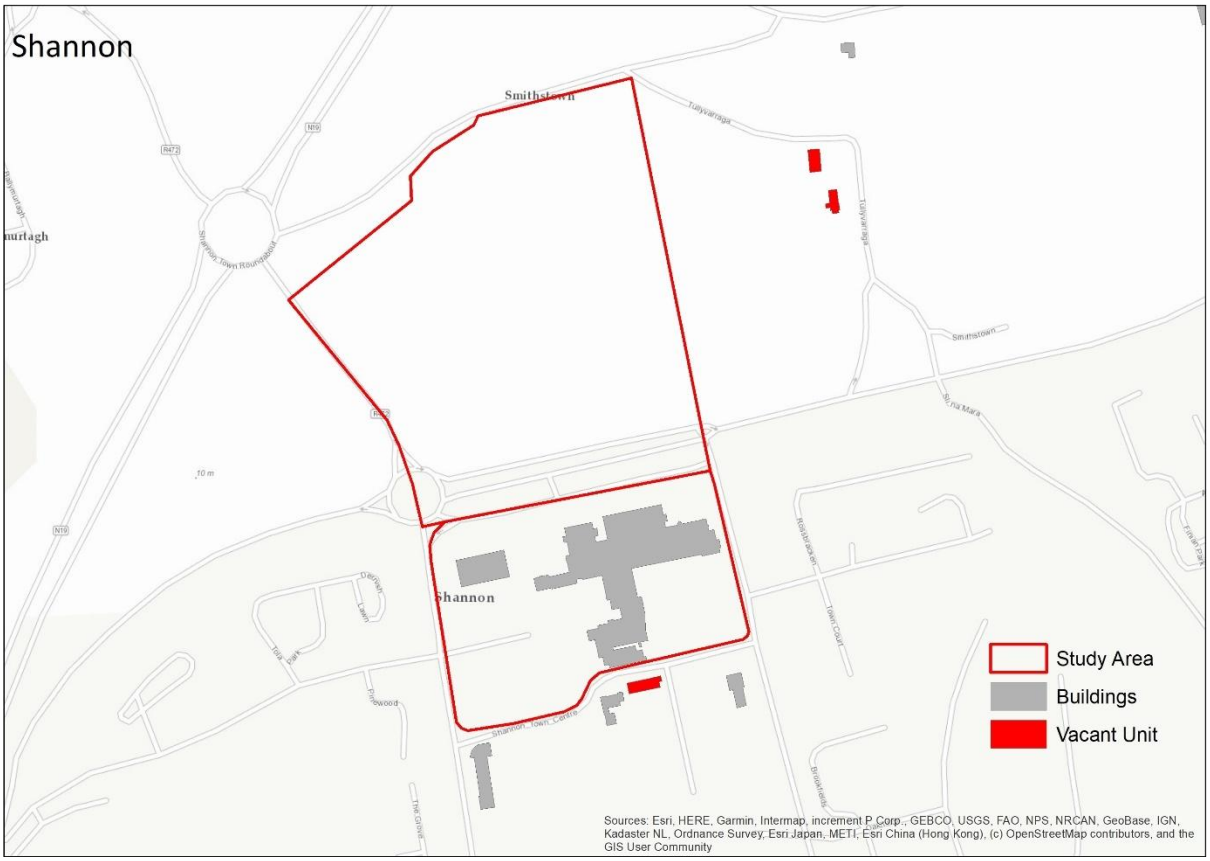


Figure 5-9: Vacant retail units in Shannon

5.3.3.8 *Key Actions and recommendations*

— Maintain the vitality and viability of the Skycourt Shopping Centre by consolidating investment in the shopping centre.
— Encourage and facilitate the reuse of vacant units/sites throughout the town and shopping centre.
— Support the Shannon Special Development Area objectives to create a strengthened viable and vibrant Town Centre supporting a quality, varied retail offer with improved physical appearance, connectivity and the development of a 'streetscape'.
— Consider adopting a 'Shopfront Improvement Scheme' Planning Guidance Note outlining eligibility, grant funding, design principles criteria etc. to encourage use of the scheme.

5.4 District Centres and Retail Parks

This section presents the findings of a series of mini health check assessments undertaken for the District Centres, including the Crescent Shopping Centre, Parkway Shopping Centre, Roxboro Shopping Centre, Castletroy Shopping Centre, and Jetland Shopping Centre (Caherdavin) and the Retail Parks of Parkway Retail Park, Childer's Retail Park, Eastpoint Business Park, City East Retail Park.

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5.4.1 Dooradoyle (Crescent Shopping Centre)

5.4.1.1 *Introduction*

Dooradoyle (Crescent Shopping Centre) is located within close proximity to Limerick City Centre along the R526. This attractive modern shopping centre has been expanded several times since its opening in 1973 and provides 37,000m² of retail space and 2,500 parking spaces. This substantial shopping centre caters for the local population and also the surrounding areas.

5.4.1.2 *Diversity of Uses and Multiple Representation*

This attractive retail centre contains 80+ retailers and includes stores such as Next, Zara, H&M, Superdry and River Island. Tesco, Penneys and Shaws are the primary anchors of the Crescent. The centre comprises primarily comparison shopping with 84% of units noted as providing a comparison retail function. The centre also includes a cinema, food outlets and a large Tesco. There are services in the centre, predominantly banks, although the local library is situated just outside the scheme in the car park. No bulky comparison retail units were recorded.

Table 5.7: Diversity of uses within the Crescent Shopping Centre

Crescent Shopping Centre	No. of Units	Unit (%)
Bulky	0	0%
Comparison	43	84%
Convenience	8	16%
Total	51	100%

Table 5.8: Overall Vacancy within the Crescent Shopping Centre

Crescent Shopping Centre	No. of Units	Unit (%)
Vacant Units	5	5%
Total Units	97	100%

5.4.1.3 *Levels of Vacancy*

The Crescent Shopping Centre had a low overall vacancy rate of 5%. In total there were 5 units noted as vacant out of a total of 97 as shown on Figure 5-10. This centre had the lowest vacancy rate out of all study areas analysed.

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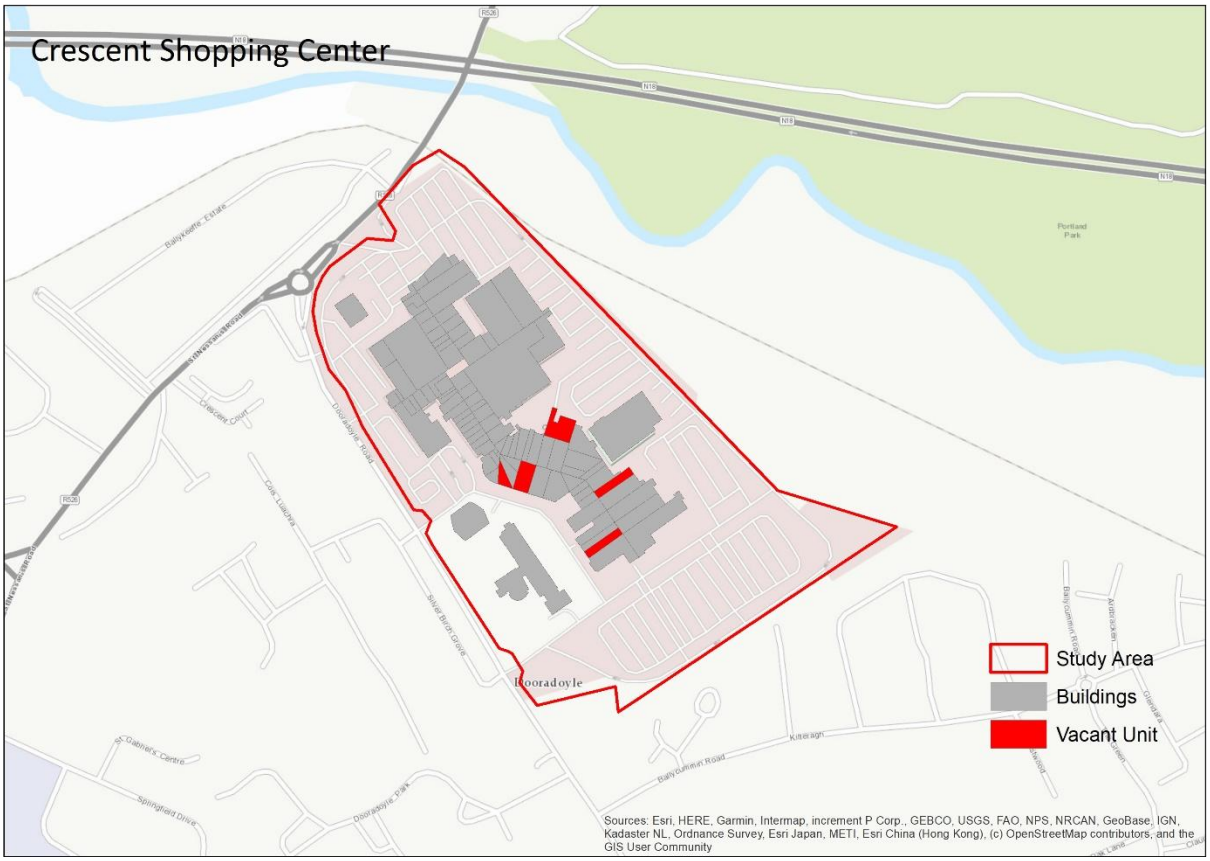


Figure 5-10: Vacant units in the Crescent Shopping Centre

5.4.1.4 Shopping Rents and Commercial Yields

Zone A retail units located within the Crescent Shopping Centre are considered to be in the region of €1,550 per square meter, based on an analysis of the market in Q1 2021. Typical shopping centre units would have a commercial yield in the region of 8%, within the same region as high streets within Limerick City[29]. Other specific factors such as size, characteristics and number of sharing tenants could result in slightly adjusted achievable values but the above provides an informed view of the local market as of Q1 2021.

5.4.1.5 Key Actions and recommendations

The Crescent Shopping Centre is a very popular destination and has a long-established, important role in the City's retail hierarchy. It offers a very strong retail experience which contrasts with the multiple uses and functions that Limerick City Centre provides. It is not considered appropriate to support significant expansion of retail floorspace in the shopping centre. However, planning policy should not restrict the centre adapting to contemporary challenges and evolving in terms of its functionality.

— Consider the limited expansion where it does not have an adverse impact on Limerick City Centre.

[29] Source: Cushman & Wakefield Research Q1 2021

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— Allow for modernisation and adaption of the centre to address modern needs.

5.4.2 Childer's Road Retail Park/Ballysimon Road Study Area – Childer's Retail Park/ City East Retail Park and Eastpoint Business Park

5.4.2.1 Introduction

The Childer's Road Retail Park/Ballysimon Road Study Area includes the Childer's Road Retail Park, City East Retail Park and Eastpoint Business Park. The Childer's Road Retail Park is situated immediately adjacent to the south of the Parkway Retail Park. Access to the Childer's Road Retail Park is via the R509 (Childer's Road). This popular retail park contains a large surface car park.

The Eastpoint Business Park is located to the south of Childer's Road Retail Park and City East Retail Park is located just east of Eastpoint Business Park, both with access from Ballysimon Road. Together these two retail parks extend over 1.5km and are characterised by large warehouses which encompass much of the Ballysimon Road, between the Tipperary Roundabout and Garyglass Roundabout. The retail parks are attractive for retailers as they have good accessibility and are within close proximity to Limerick City Centre.

5.4.2.2 Diversity of Uses and Multiple Representation

Childer's Retail Park is a modern retail warehouse scheme providing multiple retail units many of which sell comparison goods. Dunnes stores is the main anchor of the retail park. Boots, Sports Direct, Next, Lifestyle Sports, The Range and Harry Corry Interiors are all located on site. There are food and beverage outlets occupying units within the car park.

The Eastpoint Business Park and City East Retail Park provides a range of services and is noted to be the primary area for bulky comparison retail units within the Limerick Metropolitan Area. Notable retailers in the area include J&B Furniture, Cash & Carry Kitchens, Harvey Norman and B&Q.

Table 5.9: Diversity of uses within Childer's/Ballysimon Road Study Area

	Childer's Retail Park		Eastpoint Business Park		City East Retail Park	
	No. of Units	Unit (%)	No. of Units	Unit (%)	No. of Units	Unit (%)
Bulky	0	0%	13	42%	1	20%
Comparison	8	80%	15	48%	3	60%
Convenience	2	20%	5	10%	1	20%
Total	10	100%	31	100%	5	100%

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Table 5.10: Overall retail vacancy within Childer's Road Retail Park/Ballysimon Road Study Area

	Childers Retail Park		Eastpoint Business Park		City East Retail Park	
	No. of Units	Unit (%)	No. of Units	Unit (%)	No. of Units	Unit (%)
Vacant Units	2	7%	14	9%	1	6%
Total Units	30		158		18	

5.4.2.3 Levels of Vacancy

Overall vacancy within the Childer's Retail Park, Eastpoint Business Park and City East Retail Park was relatively low at 8%. As shown on Figure 5-11 below all three parks have very few vacant units. Breaking it down individually, Table 5.10 outlines that the Childer's Retail Park had a vacancy rate of 7%, the Eastpoint Business Park had a vacancy rate of 9% and the City East Retail Park had the lowest vacancy rate of 6%.

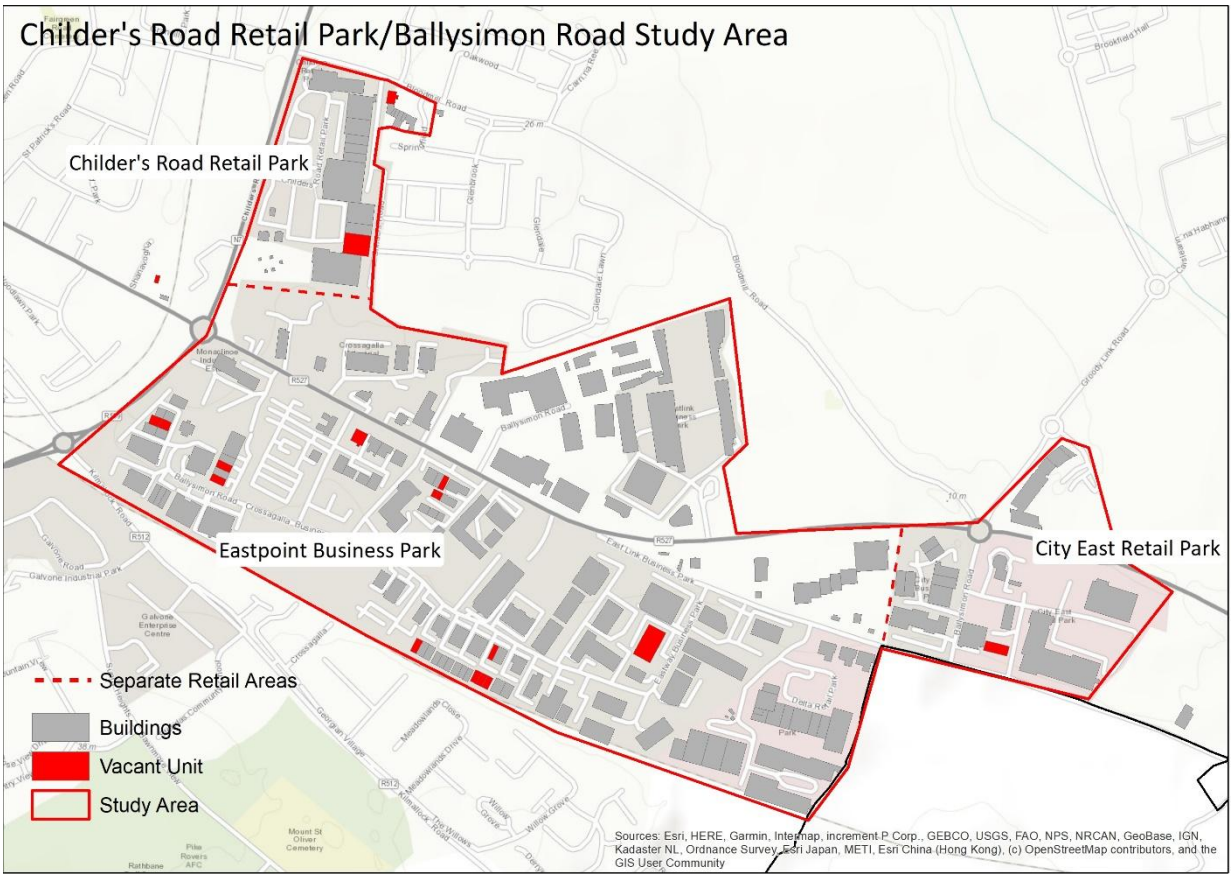


Figure 5-11: Vacant units within the Childer's Road/Ballysimon Road Study Area

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5.4.2.4 *Key Actions and recommendations*

Childer's Road Retail Park, Eastpoint Business Park and City East Retail Park are performing well with low vacancy levels recorded.

— Consider limited expansion of the retail parks if the proposed development does not have adverse impacts on Limerick City Centre.
— Maintain vitality and viability of these retail centres.

5.4.3 Parkway Shopping Centre/ Parkway Retail Park

5.4.3.1 *Introduction*

The Limerick Parkway Shopping Centre and Parkway Retail Park are situated 2km east of Limerick City Centre along the Dublin Road. These retail centres are attractive for retailers as they have good accessibility and are within close proximity to Limerick City Centre. The Parkway Shopping Centre provides just over 12,500m² and 700 car parking spaces.

5.4.3.2 *Diversity of Uses and Multiple Representation*

The Parkway Shopping Centre is the larger centre and is centred around Dunnes stores, which provides both convenience and comparison functions. Notable retailers within the shopping centre include Easons, Gamestop, Homecare Medical and Eurogiant. The centre is primarily comparison retail but also contains restaurants and services such as the NDSL and EBS.

Parkway Retail Park lies directly opposite the Parkway Shopping Centre and comprises wholly of comparison retail and includes bulky goods such as Homebase, JYSK and Carpetright. A restaurant is located on site. Bulky retail accounted for 14% of total retail units and comparison accounted for 86% of total units.

Table 5.11: Diversity of uses within Parkway

Parkway	No. of Units	Unit (%)
Bulky	3	14%
Comparison	16	76%
Vacant	2	10%
Total	21	100%

Table 5.12: Overall retail vacancy within Parkway

Parkway	No. of Units	Unit (%)
Vacant Units	5	15%

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Total Units	34	100%

5.4.3.3 *Levels of Vacancy*

The Parkway Shopping Centre and Parkway Retail Park had a vacancy rate of 15%. The Parkway Retail Park recorded no vacant units. As seen in Figure 5-12, the initial desktop assessment of Parkway Retail Park and Parkway Shopping Centre did not allow the distinction and identification of individual vacant units. Vacancy was subsequently confirmed through physical site inspections.

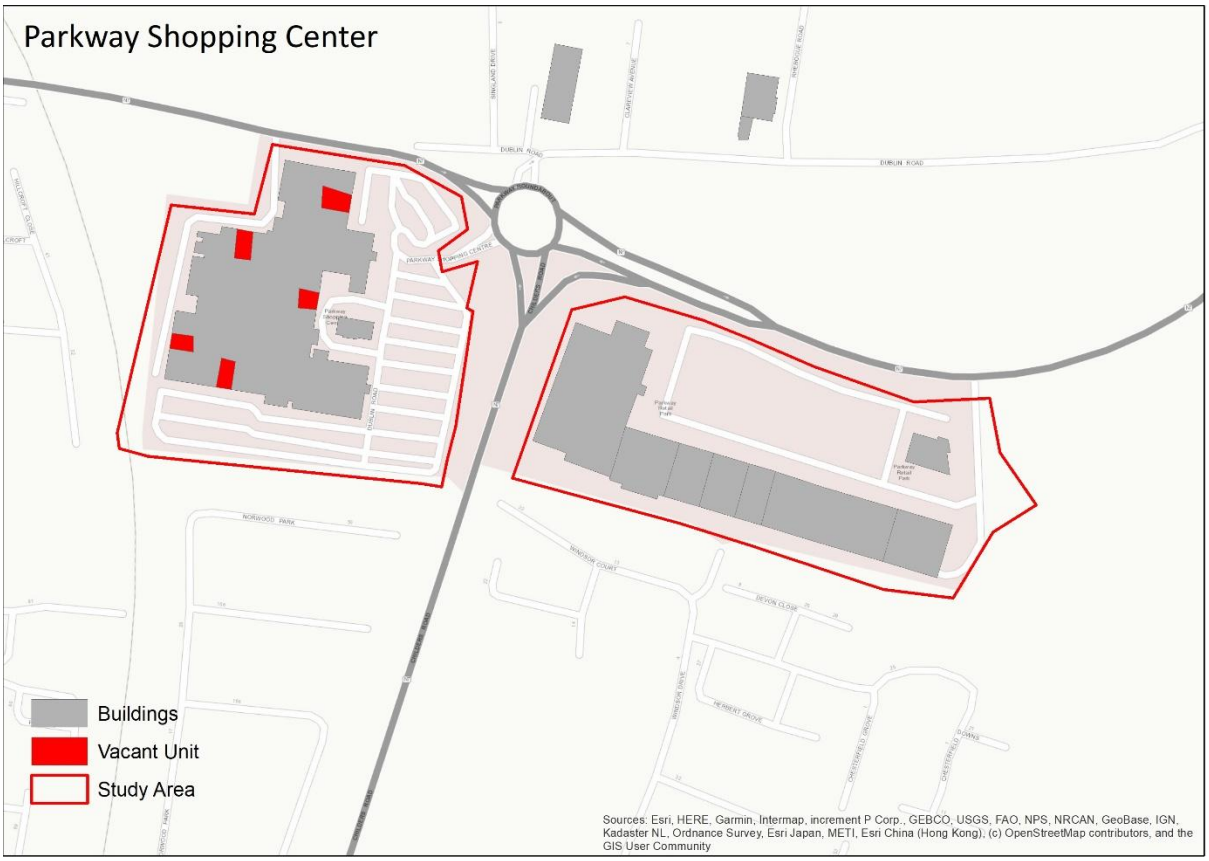


Figure 5-12: Parkway Vacant units

5.4.3.4 *Key Actions and recommendations*

Parkway Shopping Centre and Parkway Retail Park are fulfilling their primary function to support the residential catchment. Additional floorspace is not envisaged under this plan.

— Consider the limited expansion of the Parkway Shopping Centre/Retail Park ensuring that there will be no direct negative impact on Limerick City Centre.

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5.4.4 Roxboro Shopping Centre

5.4.4.1 Introduction

Roxboro Shopping Centre is located southeast of Limerick City Centre on the inner ring road. The shopping centre can be accessed via the R509 and the R511. The shopping centre has an outdated façade and is less attractive than other retail centres within the Limerick Metropolitan Area.

5.4.4.2 Diversity of Uses and Multiple Representation

A Tesco supermarket is the primary anchor of the shopping centre, providing convenience retail. Comparison retail units are limited. The centre also includes food outlets, banking facilities, healthcare services, a post office and a Circle K is located to the south of the retail centre. No bulky units were recorded.

Table 5.13: Diversity of uses within Roxboro

Roxboro Shopping Centre	No. of Units	Unit (%)
Bulky	0	0%
Comparison	2	40%
Convenience	3	60%
Total	100	100%

Table 5.14: Overall retail vacancy within Roxboro

Roxboro Shopping Centre	No. of Units	Unit (%)
Vacant Units	13	45%
Total Units	29	100%

5.4.4.3 Levels of Vacancy

The Roxboro Shopping Centre recorded high levels of vacancy as illustrated on Figure 5-13 with almost all internal units recorded as vacant. External units had a low vacancy rate. The centre had an overall vacancy rate of 45%.

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Figure 5-13: Vacant units in Roxboro Shopping Centre

5.4.4.4 Key Actions and recommendations

The Roxboro Shopping Centre appears to be outdated and will benefit from rejuvenation to increase attractiveness and reduce vacancy. No additional floorspace is envisaged.

— Consider rejuvenating the Roxboro shopping centre.
— Roxboro's primary function is likely to remain predominately convenience with no identifiable role as a comparison retail destination.

5.4.5 Castletroy Shopping Centre

5.4.5.1 Introduction

The Castletroy Shopping Centre is located approx. 4.5km to the east of Limerick City Centre and is situated on the south side of the Dublin Road. The centre can be accessed along the Kilmurry Road and has an abundance of parking.

5.4.5.2 Diversity of Uses and Multiple Representation

The shopping centre has a good variety of comparison retailers and has grown to over 30+ units. Comparison retailers include Tech Star, Meadows and Byrne, Specsavers and the Card Company. The centre also contains a cinema and McDonald's. A large Supervalu store is situated within the shopping centre and is the principal convenience

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unit within the Castletroy Shopping Centre. A Lidl is located to the north of the shopping centre on the northern side of the Dublin Road.

Table 5.15: Diversity of uses in Castletroy Shopping Centre

Castletroy Centre	No. of Units	Unit (%)
Bulky	1	6%
Comparison	7	41%
Convenience	9	53%
Total	17	100%

Table 5.16: Overall retail vacancy within Castletroy Shopping Centre

Castletroy Centre	No. of Units	Unit (%)
Vacant Units	5	14%
Total Units	36	100%

5.4.5.3 Levels of Vacancy

The retail study area of Castletroy Shopping Centre has a current commercial vacancy rate of 14%. As seen in Figure 5-14, the initial desktop assessment of Castletroy Shopping Centre did not allow the distinction and identification of individual vacant units. Vacancy was subsequently confirmed through physical site inspections.

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Figure 5-14: Castletroy Retail and Vacancy

5.4.5.4 Key Actions and recommendations

Castletroy Shopping Centre serves as an important District Centre.

— Castletroy should remain predominately convenience retail and should not develop into a primarily comparison goods retail destination.

5.4.6 Caherdavin (Jetland Shopping Centre)

5.4.6.1 Introduction

The suburban area of Caherdavin includes the Jetland Shopping Centre and Coonagh Cross. Jetland Shopping Centre is a modern, purpose-built shopping centre situated roughly 2.5km to the west of Limerick City Centre along the Ennis Road. It is located in an established residential area within the Limerick Metropolitan Area and is within close proximity to the Gaelic Grounds Stadium. Ennis Road Retail Centre is adjacent to the shopping centre.

5.4.6.2 Diversity of Uses and Multiple Representation

The Jetland Shopping Centre provides a modern, spacious environment for retailers. Dunnes stores is the primary convenience retailer within the shopping centre. Comparison retail is the principal form of retail in Jetland. The centre also provides a state-of-the-art food hall with seating and includes a drive-through McDonald's. Immediately adjacent to Jetland Shopping Centre is the Ennis Road Retail Park which

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comprises comparison and bulky retail units and the Vue cinema. Additionally, outside of the Jetland Shopping Centre on the north side of the Ennis Road lies a Lidl supermarket.

Table 5.17: Diversity of uses within Jetland SC

Jetland Shopping Centre	No. of Units	Unit (%)
Bulky	1	8%
Comparison	8	67%
Convenience	3	25%
Total	12	100%

Table 5.18: Overall retail vacancy within Jetland SC

Jetland Shopping Centre	No. of Units	Unit (%)
Vacant Units	8	25%
Total Units	32	100%

5.4.6.3 Levels of Vacancy

The three retail centres had an overall vacancy rate of 25%. While vacancy does exist within Jetland Shopping Centre, the initial desktop assessment (as seen in Figure 5-15) did not allow the distinction and identification of individual vacant units. Vacancy was subsequently confirmed through physical site inspections.

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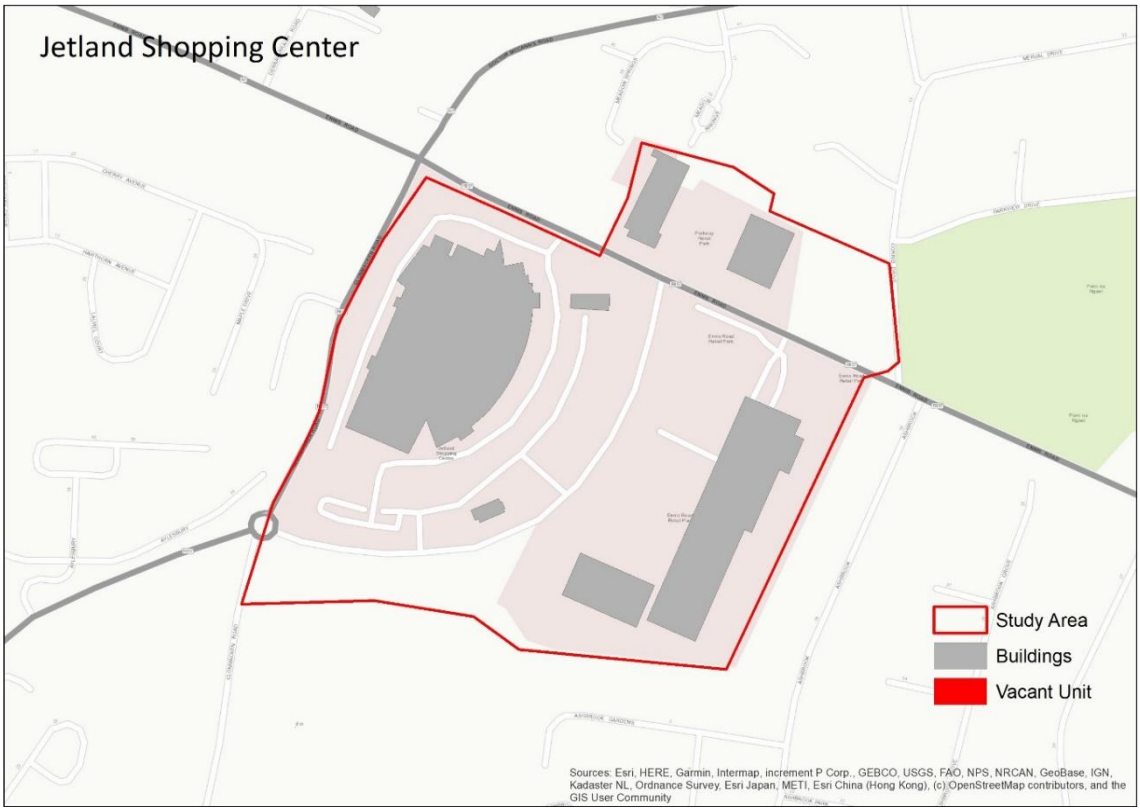


Figure 5-15: Vacant units within the Jetland Shopping Centre

5.4.6.4 Key Actions and recommendations

Jetland Shopping Centre shall only be considered for limited expansion where appropriate. The centre should not develop into a primarily comparison goods retail destination.

— Jetland Shopping Centre should only be expanded where the proposed development does not have a negative impact on Limerick City Centre.

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6 Projected Retail Floorspace Requirements

6.1 Introduction

This section provides an overview of the quantitative assessment of retail floorspace in the study areas, to model for likely future floorspace requirements across the Metropolitan Area and County Limerick for the period of the plan (2022-2028). The assessment takes account of emerging trends in the retail market (as discussed in Section 3), estimates of future demand, projected changes in the population, consumer spending, existing turnover generation and the capacity for future floorspace potential.

The assessment of retail floorspace is carried out for the three retails types of interest: 1) Convenience; 2) Comparison Non-Bulky (referred to as 'comparison'); and 3) Comparison Bulky (referred to as 'bulky'). The base year of the assessment is set at 2021, unless otherwise stated, with figures rounded to the nearest whole number where relevant. The estimated future retail floorspace potential is derived for the retail catchment areas of County Limerick and the aggregate sum of these is also provided for a County total of same. Special provision has been made for the Limerick Catchment area as it extends north of the Metropolitan Area into County Clare. The assessment of population, expenditure, retail floorspace and other inputs used in the determination of future floorspace requirements is based in the catchment as a whole (with the portion extending into County Clare).

The future estimated floorspace requirements as calculated through the modelling process are only intended to provide broad guidelines on the allocation of additional floorspace to the existing footprint of convenience, comparison and bulky floorspace. Therefore, these figures should not be interpreted as overly prescriptive or serve to inhibit competition – as stated in the requirements of the Retail Planning Guidelines (2012).

6.1.1 Methodological Approach

The following approach describes the step by step methodology used in the assessment of existing and future retail floorspace capacity across the catchment areas:

Step 1: Establish catchment areas of assessment and utilise the agreed population forecasts in base, period and design years;

Step 2: Estimate the available expenditure per capita for each of the retail categories (convenience, comparison and bulky goods) at the base year and design year;

Step 3: Compile a projection of the total available expenditure in the base year and design year for residents to allow for assumed expenditure inflows and outflows;

Step 4: Undertake a projection of the anticipated change in available expenditure (accounting for identified inflows and outflows) which will support the provision of additional floorspace;

Step 5: Estimate the indicative turnover of existing floorspace in convenience, comparison and bulky goods;

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Step 6: Estimate the representative turnover of existing floorspace in convenience, comparison and bulky goods;

Step 7: Compile a breakdown of vacant floorspace and estimate the assumed retail allocation;

Step 8: Derive the residual surplus or shortfall between adjusted available expenditure and assumed future turnover;

Step 9: Summarise the capacity potential for additional floorspace across each of the three retail categories and account for vacancy.

6.1.2 Defining Study and Catchment Areas

For the purpose of this assessment the Counties of Limerick and Clare have been subdivided into the following two catchment areas:

- Limerick Catchment (including the Limerick-Shannon Metropolitan Area and overlap of the catchment into County Clare);
- Newcastle West Catchment.

The catchment areas have been defined using an assessment of driving time accessibility, extending outwards from the key towns in each of the catchment areas. Multiple time-thresholds were used in the assessment of catchment areas, after which the 20-minute threshold was selected as the best suited delineator as it minimises overlaps, while also maximising population reach within an accessible time period. The driving time accessibility assessment also considers factors such as geography and existing road network and hierarchy in the determination of reach. The following figure shows the drive time accessibility from the key towns in the catchment areas.

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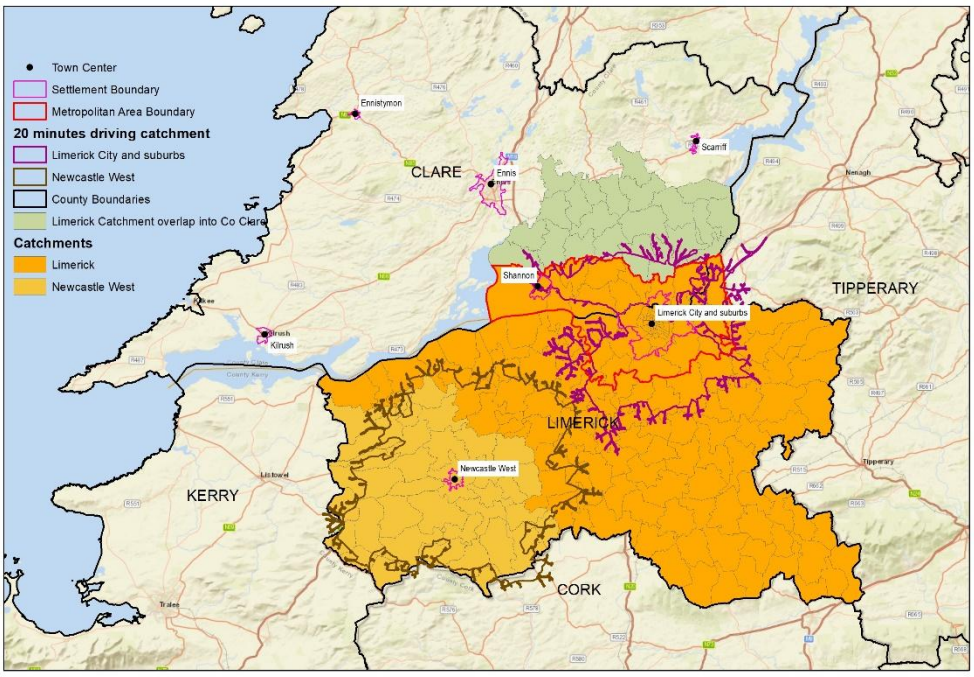


Figure 6-1: 20-minute drive time reach from Key Towns in Catchment Areas

In order to better define the catchment areas, an electoral division (ED) level assessment was undertaken using a 'best-fit approach' to assign EDs to each catchment area, forming the basis of population calculations. The following map provides an overview of the catchment areas in each County at ED level allocation.

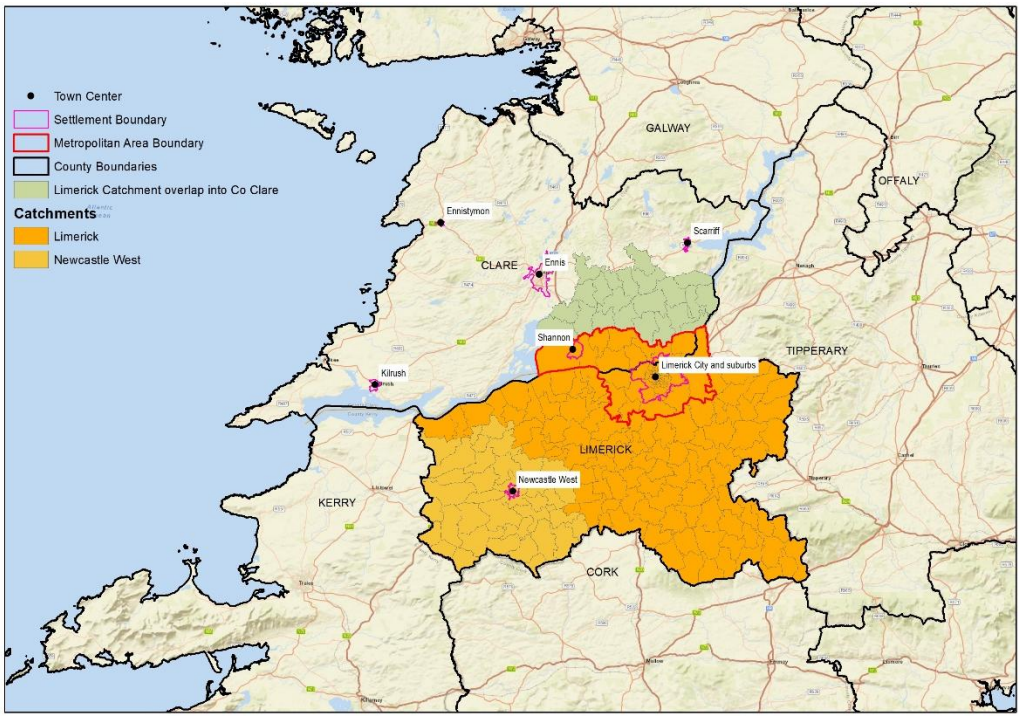


Figure 6-2: Retail Study Catchment Areas

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Within each catchment area, certain areas of interest were delineated as retail study areas. These study areas include areas with an existing retail nodal presence, whether in the form of a shopping centre or other high street shopping facilities (see maps in Appendix A.1). In addition to the delineated study areas, consideration was given to other retail facilities outside of the retail nodes that still have an influence on the retail environment and dynamic within each catchment area. These retail facilities were included in the floorspace modelling in addition to the retail facilities identified within the study areas.

6.2 Population

The catchment populations for the period of the plan were calculated from CSO base data of 2016, projected forward to 2028 to the NPF target population set out for settlements.

6.2.1 Limerick Catchment Population

The Limerick Catchment population includes a multitude of CSO settlement areas and other settlement areas categorised as 'rural'. The Census 2016 settlement population for the areas were totalled and compared to the 2028 targeted population for settlements as set out by the NPF. A linear population projection method was used to calculate the annual population totals for each year from 2016 to 2028 and specifically for the period of the plan from 2022-2028. Consideration was given to the portion of the Limerick Catchment that overlaps into County Clare. This section's population estimates were based on a proportionate increase to 2028[30], with similar linear annual growth applied.

The following table provides a breakdown of the population for the Limerick Catchment area, including the portion overlapping into County Clare, as well as the Newcastle West Catchment area.

Table 6.1: Catchment Population Projections

Population in each Catchment Area					
Year	Census	Catchment Populations as allocated under NPF alignments			
	2016	2022	2024	2026	2028
Limerick Catchment					
Population	209,413	234,642	243,051	251,461	259,767
Change # from 2016	-	25,229	33,638	42,048	50,354
Change % from 2016	-	12.0%	16.1%	20.0%	24%
Newcastle West Catchment					
Population	27,043	29,172	29,882	30,591	31,301
Change # from 2016	-	2,129	2,839	3,548	4,258

[30] This was developed in agreement with Clare County Council.

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Change % from 2016	-	7.9%	10.5%	13.1%	15.7%

6.3 Expenditure Estimates

To determine the available expenditure for each catchment area, the CSO Annual Services Inquiry (ASI) was consulted to review the published expenditure per capita data at County level. As of the preparation date of this assessment, the latest ASI figures were published in February 2021 and reflect a distilled view of national account data to 2018. The data published provides gross estimates of expenditure in each of the relevant retail sectors (as set out in the Retail Planning Guidelines), in the principle trading aggregates at national level. The following table shows the selected turnover aggregates related to the retail sectors specifically categorised as convenience, comparison, or bulky goods at State level[31].

Table 6.2: Determination of State Level Convenience and Comparison Retail Sales Turnovers

(State) Determination of Convenience and Comparison Retail Sales Turnover			
Retail Goods (State: 2018 Latest Year)	**Turnover Excl. VAT (€'000) - 2018**	**VAT on Turnover (€'000) - 2018**	**Turnover Incl. VAT (€'000) - 2018**
Convenience Goods			
Convenience Goods Sales in Non-Specialised Stores	€15,633,106	€2,642,708	€18,275,814
Convenience Goods Sales in Specialised Stores	€1,767,221	€403,922	€2,171,143
Retail sale via stalls and markets	€59,241	€8,130	€67,371
Total of Convenience Goods	**€17,459,568**	**€3,054,760**	**€20,514,328**
Comparison Goods			
Comparison Goods Sales in Non-Specialised Stores	€1,737,012	€293,634	€2,030,646
Comparison Goods Sales in Specialised Stores	€17,142,417	€4,123,024	€21,265,441
Retail sale via stalls and markets	€59,241	€8,130	€67,371
Total of Comparison Goods	**€18,938,669**	**€4,424,788**	**€23,363,458**
Overall Total	**€36,398,237**	**€7,479,548**	**€43,877,785**

[31] A splitting of retail sales in non-specialised stores between convenience and comparison has been incorporated on the basis of an 85:15 split towards convenience. This was informed by further specific breakdowns of retail sales by the CSO, isolating Department Stores from convenience sales.

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With the data in Table 6.2 available at State level, a County-level per capita income adjustment is made to Counties Limerick and Clare (separately, based on each County's per capita expenditure for the 2018 base year) by using the CSO's publication on County Disposable Incomes and Regional GDP (published February 2021), which indicated that per capita incomes in County Limerick were approximately 109.5% that of State in 2018. Growth in retail sales informed by the Retail Sales Index (RSI) and inflation are applied to the 2018 figures to bring it forward to 2021.

The use of RSI figures takes account of the recent historic and near-term effects of COVID-19 on retail sales. For the base year of 2021, per capita expenditure on convenience and comparison goods in the functional area of Limerick City and County Council has been estimated at €4,752 and €5,344, respectively.

Table 6.3: Per Capita Expenditure Estimates on Convenience and Comparison Goods - Limerick

(County) Determination of Per Capita Expenditure on Convenience and Comparison Retail Goods					
Year	**Annual Growth Rate (%)***		**Per Capita Expenditure (€)**		**Inflation to 2021**
	Conven.	**Compar.**	**Conven.**	**Compar.**	**HICP**
2018	*Indexed at 109.55% of State*		€4,627	€5,270	-
2019	*2.51%*	*2.51%*	€4,786	€5,451	0.9%
2020	*10.00%*	*-15.00%*	€5,238	€4,610	-0.5%
2021	*-10.00%*	*15.00%*	€4,752	€5,344	0.8%
2022	1.00%	3.00%	€4,800	€5,504	-
2023	1.00%	3.00%	€4,848	€5,669	-
2024	1.00%	3.00%	€4,896	€5,839	-
2025	1.00%	3.00%	€4,945	€6,014	-
2026	1.00%	3.00%	€4,994	€6,195	-
2027	1.00%	3.00%	€5,044	€6,381	-
2028	1.00%	3.00%	€5,095	€6,572	-

As seen in Table 6.3, latest publications from the RSI indicated that expenditure on convenience goods increased by 10% from 2019 to 2020 with the onset of COVID-19, with comparison shopping expenditure reducing significantly by 15%.

This fluctuation is however expected to be reversed in 2021 with an outlook on retail shopping returning to 'normal' and expenditure on comparison goods, in turn, increasing by 15% while expenditure on convenience goods is expected to decrease as other retail food facilities such as restaurants and pubs open again.

6.4 Total Available Expenditure

The total available expenditure for each study area is calculated by multiplying the catchment population by the expenditure per capita per retail category, for each year.

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However, data available from the ASI provides expenditure figures for convenience and comparison goods, without distinction between non-bulky and bulky goods.

As total available expenditure is a factor of population and per category expenditure, it is important to allocate a percentage of expenditure on comparison goods to non-bulky and bulky goods.

Given consideration to the CSO Household Budget Survey (2016), the ASI and additional market sources, it is projected that approximately 80% of all expenditure on comparison goods is apportioned to non-bulky goods, with 20% going to bulky goods.

This proportionate split of expenditure on comparison goods is important to consider due to the significantly different levels of turnover generated by the sale of comparison goods such as clothing, footwear and smaller household durables, compared to that of bulky household goods (large appliances, furniture) sold in retail warehouses.

Table 6.4: Total Available Expenditure (Projected 2021 Prices)

Total Available Expenditure (At Projected 2021 Prices)			
Year	**Convenience Total Available Expenditure (€)**	**Split of Comparison Total Available Expenditure - Non-Bulky Goods (€) (0.8%)**	**Split of Comparison Total Available Expenditure - Bulky Goods (€) (0.2%)**
Limerick Catchment			
2021	1,095,034,285	985,097,244	246,274,311
2022	1,126,165,540	1,033,164,493	258,291,123
2024	1,189,974,566	1,135,367,921	283,841,980
2026	1,255,893,733	1,246,187,915	311,546,979
2028	1,323,454,719	1,365,750,696	341,437,674
Newcastle West Catchment			
2021	136,938,485	123,190,412	30,797,603
2022	140,010,807	128,448,429	32,112,107
2024	146,299,356	139,585,837	34,896,459
2026	152,784,140	151,603,391	37,900,848
2028	159,470,505	164,566,985	41,141,746

Figures in the table above indicate a consistent growth in expenditure on convenience and comparison goods throughout the plan period, for both catchment areas. Expenditure in Limerick Catchment is projected to increase by an estimated €704m (30.3%) from 2022 to 2028, which consists of a 21% and 30% increase in convenience and comparison expenditure respectively. In turn, expenditure in Newcastle West Catchment area is set to increase by 26%, with a growth rates in convenience of 16% and a growth rate in comparison goods expenditure of 34%.

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6.5 Adjusted Expenditure

The total available expenditure requires adjusting to take into account localised trade flows (whether physical or online) and out of catchment leakage. These 'inflow and outflows' or adjustments are informed through a consideration of the survey results, reported data on spending habits and forecasted changes. They are distilled as a percentage share for each retail type that is used to modify the total available expenditure (by taking from it or adding to it) for each catchment (see Section 4.3.6 for more information on these inflows and outflows).

The adjustments applied modulate the amount of expenditure available in a catchment area based on survey respondents' preference in shopping location. For the purpose of this assessment and for the duration of the Plan, the various flows are held fixed from their determination point. The adjustments made to the total expenditure include a percentage increase for core inflow and a value increase for tourism spend, while decreases are applied for core outflow and outflow as a result of online shopping. The tables below set out the inflows, outflows and leakage applied to the total available expenditure in each retail category to produce the adjusted total available expenditure used in the assessment of turnover.

Table 6.5: Adjusted Total Available Expenditure - Convenience Goods

Adjusted Total Available Expenditure - Convenience Goods						
Year	**Total Available Expenditure (€)**	**Outflow (%)**	**Inflow (%)**	**Online Outflow (%)**	**Tourism Expenditure Inflow (€)**	**Adjusted Total Available Expenditure (€)**
Limerick Catchment						
2019	1,062,584,126	0.00%	5.81%	5.70%	36,385,800	1,100,180,777
2022	1,126,165,540	0.00%	5.81%	6.00%	22,930,380	1,147,000,729
2024	1,189,974,566	0.00%	5.81%	6.00%	32,063,460	1,219,824,120
2026	1,255,893,733	0.00%	5.81%	6.00%	36,312,540	1,289,869,726
2028	1,323,454,719	0.00%	5.81%	6.00%	39,535,980	1,360,528,457
Newcastle West Catchment						
2019	134,517,316	13.04%	1.45%	5.70%	7,448,100	118,701,718
2022	140,010,807	13.04%	1.45%	6.00%	4,639,800	120,016,822
2024	146,299,356	13.04%	1.45%	6.00%	6,520,140	127,079,291
2026	152,784,140	13.04%	1.45%	6.00%	7,423,680	133,326,668
2028	159,470,505	13.04%	1.45%	6.00%	8,107,440	139,520,381

Following the consideration of flows, the adjusted expenditure for convenience goods over the period in the Limerick Catchment is forecast to increase by 23.7% by 2028 on pre-COVID 2019 levels (24.6% before adjustment) and by 17.5% by 2028 in the Newcastle West Catchment (18.6% before adjustment).

Forecasted changes in comparison non-bulky expenditure are set to see increases of 44% for Limerick Catchment on 2019 levels (41.1% pre-adjustment) and 42% for Newcastle West Catchment (34.3% pre-adjustment).

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Comparison bulky goods are not forecast to benefit from the return of tourism inflows, unlike convenience and comparison non bulky goods, however, on 2019 levels, Limerick Catchment is anticipated to increase by 42.9% by 2028 (41.1% pre-adjustment) and 37.3% for Newcastle West (34.3% pre-adjustment).

Table 6.6: Adjusted Total Available Expenditure - Comparison Goods

Adjusted Total Available Expenditure - Comparison Goods (Non-Bulky)						
Year	**Total Available Expenditure (€)**	**Outflow (%)**	**Inflow (%)**	**Online Outflow (%)**	**Tourism Expenditure Inflow (€)**	**Adjusted Total Available Expenditure (€)**
Limerick Catchment						
2019	968,128,799	9.55%	32.36%	15.20%	38,740,000	1,080,596,977
2022	1,033,164,493	9.55%	32.36%	12.00%	24,414,000	1,169,320,750
2024	1,135,367,921	9.55%	32.36%	12.00%	34,138,000	1,292,302,024
2026	1,246,187,915	9.55%	32.36%	12.00%	38,662,000	1,419,631,792
2028	1,365,750,696	9.55%	32.36%	12.00%	42,094,000	1,555,557,927
Newcastle West Catchment						
2019	122,559,790	60.00%	3.23%	15.20%	7,930,000	42,278,370
2022	128,448,429	60.00%	3.23%	12.00%	4,940,000	45,049,058
2024	139,585,837	60.00%	3.23%	12.00%	6,942,000	50,528,803
2026	151,603,391	60.00%	3.23%	12.00%	7,904,000	55,243,381
2028	164,566,985	60.00%	3.23%	12.00%	8,632,000	60,019,368

Table 6.7: Adjusted Total Available Expenditure - Bulky Goods

Adjusted Total Available Expenditure - Comparison Goods (Bulky)					
Year	**Total Available Expenditure (€)**	**Outflow (%)**	**Inflow (%)**	**Online Outflow (%)**	**Adjusted Total Available Expenditure (€)**
Limerick Catchment					
2019	242,032,200	8.58%	30.26%	11.40%	266,920,003
2022	258,291,123	8.58%	30.26%	10.00%	288,466,882
2024	283,841,980	8.58%	30.26%	10.00%	317,002,807
2026	311,546,979	8.58%	30.26%	10.00%	347,944,538
2028	341,437,674	8.58%	30.26%	10.00%	381,327,318
Newcastle West Catchment					
2019	30,639,948	40.00%	13.33%	11.40%	18,976,341

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2022	32,112,107	40.00%	13.33%	10.00%	20,337,668
2024	34,896,459	40.00%	13.33%	10.00%	22,101,091
2026	37,900,848	40.00%	13.33%	10.00%	24,003,870
2028	41,141,746	40.00%	13.33%	10.00%	26,056,439

6.6 Retail Floorspace Assessments

6.6.1 Existing Floorspace and Gross to Net Ratios

Table 6.8 presents retail floorspace as calculated for each catchment area. A gross-to-net floorspace ratio was applied to the gross floorspace for each study area (and additional inclusions) to calculate the net trading floorspace for premises in each of the main retail categories. The ratios applied were informed by local and international research, with a specific review of the ratios applied in other county retail strategies (of varying scales) and the previous retail strategy for the Mid-West Region (which includes Counties Limerick, Clare and Tipperary). These ratios were then sense checked with various operators within the sector and found to be consistent. In accordance with these benchmarks, the gross-to-net ratios applied in this strategy are set out below:

— Convenience Goods – 75:100 net to gross;
— Non-Bulky Comparison Goods – 75:100 net to gross;
— Bulky Comparison Goods – 85:100 net to gross.

The percentage retail floorspace per category is based on the total gross floorspace of each type within the Study Area (with inclusions) of each town assessed. For the purpose of this report the floorspace assessments are consolidated according to the retail catchment of each area assessed. Therefore, the retail catchment areas for LCCC are comprised of the Newcastle West Catchment and the Limerick Catchment.

In addition to assessed floorspace, consideration of additional retailing outside of the survey areas (but within each catchment area) was also made, such that the observed floorspace in both catchments of Limerick and Newcastle West were supplemented by an estimate of 10% additional convenience, 2% additional comparison non-bulky and 3% additional comparison bulky goods. This allows for an estimate of additional floorspace across the entire catchment area to be accounted for in a reasonable manner with respect to validated floorspaces within the study areas (and inclusions). Table 6.8 is set out with these estimates incorporated.

Table 6.8: Total Retail Floorspace within Catchment Area

Existing Retail Floorspace (Gross to Net Area)				
Retail Goods Types	**2021**			
	Gross Floorspace	**Gross to Net Ratio**	**Net Floorspace**	**Area as a % of Total Area**
Limerick Catchment				
Convenience	112,902	0.75	84,677	29.6%

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Existing Retail Floorspace (Gross to Net Area)				
Retail Goods Types	2021			
	Gross Floorspace	Gross to Net Ratio	Net Floorspace	Area as a % of Total Area
Comparison - Non-Bulky	214,329	0.75	160,747	56.2%
Comparison - Bulky	54,019	0.85	45,916	14.2%
Overall Total	**381,250**	**-**	**291,339**	**100.0%**
Newcastle West Catchment				
Convenience	12,080	0.75	9,060	36.9%
Comparison - Non-Bulky	12,797	0.75	9,598	39.1%
Comparison - Bulky	7,876	0.85	6,694	24.0%
Overall Total	**32,753**	**-**	**25,352**	**100.0%**

6.6.2 Observed Vacant Floorspace

An account was made of vacant premises observed during the assessment of retail floorspace matching the three categories of interest. Each catchment area's observed level of estimated vacant premises (in gross floorspace assessed via desktop review), has been set out in Table 6.9.

Due to restricted trading conditions at the time of survey, it is likely that a quantum of observed closed premises were not due to true vacancy. Therefore, caution is advised around the use of the observed figures.

In considering vacancy with respect to future retail needs, it is important to have regard to the fact that not all vacant floorspace will be occupied by the retail categories of interest. Some of this floorspace will be occupied by retail services and other uses. The assessed centres by their nature include a wide mix of retail and non-retail uses and this point has been considered when assessing the potential utilisation of observable vacancy. This study has assumed a conservative utilisation rate of 25% of total vacancy to be allocated for future retail use. As such, 25% of total vacancy in each catchment has been identified. This is set out below and is considered further in Section 6.13.

Table 6.9: Retail Floorspace Vacancy within Study Areas

Vacant Floorspace and Assumed Utilisation Rate	
Vacant Floorspace	**Gross Floorspace m²**
Limerick Catchment	
Total Vacant Floorspace	174,274.83
Assumed Utilisation Rate	25%
Adjusted Vacant Floorspace	**43,568.71**
Newcastle West Catchment	

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Total Vacant Floorspace	20,935.00
Assumed Utilisation Rate	25%
Adjusted Vacant Floorspace	**5,233.75**

6.7 Indicative Existing Turnover

The indicative existing turnover provides an estimate of the current turnover generated by the existing retail floorspace per category, based on the adjusted available spend in each catchment area. This indicative turnover is calculated by dividing the adjusted available expenditure by the existing floorspace, for each retail category.

Table 6.10: Indicative Turnover Generated by Existing Retail Floorspace

Existing Retail Floorspace and Indicative Retail Turnover			
Retail Goods Types	**2021**	**2019 pre-Covid**	
	Net Floorspace (m²)	**Adjusted Total Available Expenditure (€)**	**Indicative Turnover Per m² (€)**
Limerick Catchment			
Convenience	84,677	€1,100,180,777	**€12,992.72**
Comparison - Non-Bulky	160,747	€1,080,596,977	**€6,722.36**
Comparison - Bulky	45,916	€266,920,003	**€5,813.23**
Overall Total	291,339	€2,447,697,757	-
Newcastle West Catchment			
Convenience	9,060	€118,701,718	**€13,101.66**
Comparison - Non-Bulky	9,598	€42,278,370	**€4,404.96**
Comparison - Bulky	6,694	€18,976,341	**€2,834.68**
Overall Total	25,352	€179,956,429	-

The figures in the table above indicate that retail trade in the three main categories are generally healthy. Trading levels in Limerick Catchment are particularly strong, with the convenience sector operating with a turnover ratio of €12,993 per m², comparison non-bulky trading at an average of €6,722 per m² and comparison bulky trading at an average of €5,800 per m². In comparison, the trading of comparison non-bulky and bulky goods in the Newcastle West Catchment is lower, but still in line with figures noted for other counties in Ireland. A general assessment of retail trade performance in other counties including Cork, Carlow, Kilkenny, Waterford, Roscommon, Sligo, Louth, Wexford, Monaghan and Dublin, show that the indicative trade in the Limerick and Newcastle West Catchments are comparatively on par.

The indicative turnovers do however mask differences in the types and scale of retail facilities available in each of the catchment areas. Generally, larger purpose-built retail centres or retail facilities in prime locations within shopping nodes can distort figures at low levels. As such, shops in prime locations will have proportionately higher turnover

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per m² than stores located in less frequented or lower traffic centres or locations. The prominence of brand and market share also have influences on trading levels. Independent retailers' indicative turnovers are usually significantly lower than larger supermarkets or chains, with the latter having the capacity to trade at high volumes, even at lower profit margins, to control market share over an extended period.

6.8 Representative Existing Turnover

As it is unlikely that all retail facilities in each catchment will trade equally, the indicative turnover figures presented in Table 6.10 would not apply to all retail. To moderate turnover figures and for any over or under trading to capacity, a representative turnover is applied instead to the existing floorspace. The representative turnover is based on the performance of each retail category in each catchment area and the representative of comparative areas in other counties. In some cases, indicative turnover rates are adjusted down to the representative rate, while in other cases the indicative turnover is adjusted upward. A summary of the adjustments is presented below.

— Limerick Catchment:

- As the convenience indicative turnover per m² is potentially an outlier, it has been adjusted down to the representative figure of €12,000/m².
- Indicative comparison and bulky goods turnovers have been moderated slightly to the representative figure of €7,000/m² and €6,000/m² respectively.

— Newcastle West Catchment:

- With the convenience indicative turnover comparatively high, it has been adjusted down to the representative figure of €12,000/m².
- Indicative comparison turnover has been adjusted upward to €5,000/m², while the indicative bulky turnover was moderated slightly upwards to €3,000/m².

The following table presents all the catchment representative turnover of existing floorspace per catchment area.

Table 6.11: Representative Turnover of Existing Retail Floorspace

Representative Turnover of Existing Retail Floorspace		
Retail Goods Types	**Representative Turnover Per m² (€)**	**Representative Turnover of Existing Retail (€)**
Limerick Catchment		
Convenience	**€12,000.00**	€1,016,120,840
Comparison - Non-Bulky	**€7,000.00**	€1,125,226,359
Comparison - Bulky	**€6,000.00**	€275,495,746
Overall Total	**-**	€2,416,842,946
Newcastle West Catchment		
Convenience	**€12,000.00**	€108,720,662
Comparison - Non-Bulky	**€5,000.00**	€47,989,555

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Comparison - Bulky	**€3,000.00**	€20,083,051
Overall Total	**-**	€176,793,268

Despite the adjustments made to indicative turnover figures, the representative turnover used in the modelling still present healthy retail trading across retail types in each catchment area. Using this adjustment, the calculation of the residual floorspace capacity is not influenced by assumed increases in turnover efficiency, but rather identify the systemic capacity of additional floorspace should the existing floorspace capacity be trading at a healthy level.

6.9 Assumed Future Turnover

In order to calculate the requirements for additional retail floorspace in each catchment it is important to factor in the turnover per m² of future retail floorspace. For the purpose of this assessment, each catchment area's representative turnover (per retail category) has been used for the future floorspace assessment – with *no assumed change* across the Plan's period. The turnovers used are presented in Table 6.11.

6.10 Residual Capacity

The future retail floorspace requirements are calculated using the various inputs as outlined in the preceding subsections. Analysis and modelling of the inputs provide the residual capacity potential in expenditure, which subsequently informs the minimum additional floorspace requirements for each catchment area over the lifetime of the retail strategy.

The residual capacity of retail floorspace is identified through the calculation of a surplus or deficit, which is the difference between the adjusted available expenditure and the representative turnover total that can be generated from the existing floorspace in each category. Therefore, a positive difference suggests a surplus of expenditure, which represents potential capacity for new floorspace to capture the available expenditure. In turn, a negative difference suggests a shortfall in expenditure, which would not promote the development of additional floorspace until the expenditure returns to a surplus. A negative difference could also suggest an over-supply of retail floorspace in the relevant retail category, or an unhealthy trading turnover ratio of the existing floorspace.

The residual surplus/deficit for additional retail floorspace within each catchment area has been obtained by subtracting the representative turnover totals of existing convenience, comparison and bulky goods expenditure, as set out in Table 6.11, by the adjusted total available expenditure as set out in Table 6.5, Table 6.6 and Table 6.7. This is summarised (unadjusted by vacant floorspace) in the tables below (showing each retail type).

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6.10.1 Convenience Goods

From Table 6.12 it is evident that the levels of expenditure on convenience goods in both Limerick and Newcastle West Catchments, exceed the capacity of the existing convenience goods floorspace provision and therefore would warrant additional convenience floorspace in each catchment. Although the initial additional requirement for convenience goods floorspace in Newcastle West is very low, steady growth in available expenditure between 2022 and 2028 could realise the need for 2,567m² of additional convenience floorspace in the catchment. Equally strong growth of expenditure in the Limerick Catchment from 2022 to 2028 would see the requirement of additional convenience floorspace more than triple if not addressed.

Table 6.12: Expenditure Available for New Retail - Convenience Goods (Residual Surplus and Floorspace Capacity)

Expenditure Available for New Retail (Residual Surplus and Floorspace Capacity)					
Convenience Goods					
Expenditure Residual				Floorspace Capacity	
Year	Adjusted Total Available Expenditure (€)	Representative Turnover Total of Existing Floorspace (€)	Residual Surplus / Deficit (€)	Turnover per m² of Future Retail Floorspace (€)	Additional Floorspace Reqs. (Cumulative, m²)
Limerick Catchment					
2019	1,100,180,777	1,016,120,840	84,059,937	12,000	**7,005**
2024	1,219,824,120	1,016,120,840	203,703,280	12,000	**16,975**
2026	1,289,869,726	1,016,120,840	273,748,886	12,000	**22,812**
2028	1,360,528,457	1,016,120,840	344,407,617	12,000	**28,701**
Newcastle West Catchment					
2019	118,701,718	108,720,662	9,981,057	12,000	**832**
2024	127,079,291	108,720,662	18,358,629	12,000	**1,530**
2026	133,326,668	108,720,662	24,606,007	12,000	**2,051**
2028	139,520,381	108,720,662	30,799,719	12,000	**2,567**

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6.10.2 Comparison Goods

Table 6.13 below sets out the residual capacity of comparison non-bulky retailing. From the table it is seen that both catchment areas had an initial residual surplus of retail floorspace, although projected growth in the adjusted total available expenditure from 2022 to 2028 should create a residual surplus that would motivate an increase in comparison goods floorspace capacity.

The projected growth in expenditure in the Limerick Catchment translates to a surplus of €430.3m in 2028, which would support an additional 61,476m² of retail floorspace by the end of the Plan period. The residual deficit in expenditure on comparison goods in the Newcastle catchment however extends from 2019 through 2022, with projected figures for 2024 showing a surplus of €2.53m again, reflecting a minor requirement of 508m² (from a surplus of -1,142m² in 2019). Growth in expenditure continues through to 2028, resulting in a requirement of 2,406m² of comparison retail floorspace.

Table 6.13: Expenditure Available for New Retail - Comparison Goods (Residual Surplus and Floorspace Capacity)

Expenditure Available for New Retail (Residual Surplus and Floorspace Capacity)					
Comparison Non-Bulky Goods					
	Expenditure Residual			Floorspace Capacity	
Year	Adjusted Total Available Expenditure (€)	Representative Turnover Total of Existing Floorspace (€)	Residual Surplus / Deficit (€)	Turnover per m² of Future Retail Floorspace (€)	Additional Floorspace Reqs. (Cumulative, m²)
Limerick Catchment					
2019	1,080,596,977	1,125,226,359	-44,629,382	7,000	**-6,376**
2024	1,292,302,024	1,125,226,359	167,075,665	7,000	**23,868**
2026	1,419,631,792	1,125,226,359	294,405,433	7,000	**42,058**
2028	1,555,557,927	1,125,226,359	430,331,568	7,000	**61,476**
Newcastle West Catchment					
2019	42,278,370	47,989,555	-5,711,186	5,000	**-1,142**
2024	50,528,803	47,989,555	2,539,248	5,000	**508**
2026	55,243,381	47,989,555	7,253,826	5,000	**1,451**
2028	60,019,368	47,989,555	12,029,813	5,000	**2,406**

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6.10.3 Bulky Goods

As seen with comparison goods expenditure in Table 6.13, the expenditure on bulky goods (Table 6.14) was also in an initial deficit in 2019 for Limerick Catchment and Newcastle West Catchment. Despite the large annual increases in expenditure on bulky goods in Limerick Catchment, particularly between 2024 and 2028, additional requirement for bulky goods floorspace was relatively low at 17,593m² in 2028. Although there is also projected growth in bulky good expenditure in Newcastle West Catchment, the residual surplus builds slowly. It increases throughout the Plan period, in tandem with growth in available expenditure, reaching €5.97m in 2028 relates to a small requirement of 1,991m² of bulky goods floorspace.

Table 6.14: Expenditure Available for New Retail - Bulky Goods (Residual Surplus and Floorspace Capacity)

Expenditure Available for New Retail (Residual Surplus and Floorspace Capacity)					
Comparison Bulky Goods					
Expenditure Residual				Floorspace Capacity	
Year	Adjusted Total Available Expenditure (€)	Representative Turnover Total of Existing Floorspace (€)	Residual Surplus/Shortfall (€)	Turnover per m² of Future Retail Floorspace (€)	Additional Floorspace Reqs. (Cumulative, m²m²)
Limerick Catchment					
2019	270,909,519	275,495,746	-4,586,228	6,000	**-764**
2024	318,717,143	275,495,746	43,221,396	6,000	**7,204**
2026	348,654,043	275,495,746	73,158,297	6,000	**12,193**
2028	381,055,197	275,495,746	105,559,450	6,000	**17,593**
Newcastle West Catchment					
2019	18,976,341	20,083,051	-1,106,710	3,000	**-369**
2024	22,101,091	20,083,051	2,018,040	3,000	**673**
2026	24,003,870	20,083,051	3,920,819	3,000	**1,307**
2028	26,056,439	20,083,051	5,973,388	3,000	**1,991**

6.11 Future Floorspace Potential – Unadjusted for Vacancy

Based on the application of the assumed future turnover rates in Section 6.10, the residual in expenditure across each retail category has been set out in Tables 6.15-6.17. By dividing this residual by the assumed future turnover rate, the resulting future floorspace requirements can be determined in square meters.

A summary of these figures has been set out in Table 6.15. It should be noted that the figures do not include “pipeline” floorspace, i.e. retail applications which have already been permitted but not constructed at the time of the preparation of the retail strategy. Nor do the figures have regard to the extent of vacant floorspace currently observed. The extent of unimplemented floorspace is discussed in Section 6.15. The extent of vacant

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floorspace is explored in Sections 6.6.3, 6.12 and 6.13 (in accounting for the use of vacant floorspace).

Table 6.15: Indicative Future Retail Floorspace Potential (Cumulative)

Indicative Future Retail Floorspace Potential (Cumulative)			
Retail Goods Type	**Floorspace Capacity (m²)**		
	2024	**2026**	**2028**
Limerick Catchment			
Convenience Goods	16,975	22,812	28,701
Comparison Goods (Non-Bulky)	23,868	42,058	61,476
Comparison Goods (Bulky)	6,918	12,075	17,639
Total Retail Floorspace Potential	**47,761**	**76,945**	**107,815**
Newcastle West Catchment			
Convenience Goods	1,530	2,051	2,567
Comparison Goods (Non-Bulky)	508	1,451	2,406
Comparison Goods (Bulky)	673	1,307	1,991
Total Retail Floorspace Potential	**2,710**	**4,808**	**6,964**

The resulting figures indicate that unadjusted for vacancy, the Limerick Catchment has:

— A residual capacity for additional convenience floorspace presents in 2024 of 16,975m², increasing to 28,701m² by 2028, if left unaddressed.
— A residual capacity for additional comparison non-bulky floorspace presents in 2024 of 23,868m². This increases rapidly over the period to 61,476m² by 2028.
— A residual capacity of 6,918m² of comparison bulky floorspace presents in 2024. This increases over the period to 17,639m² by 2028, if left unaddressed.

The resulting figures indicate that in the Newcastle West Catchment:

— A residual capacity for convenience floorspace presents in 2024 of 1,530m², increasing to 2,567m² by 2028.
— A residual capacity for comparison non-bulky floorspace presents in 2024 of 508m², increasing to 2,406m² by 2028.
— A residual capacity for comparison bulky floorspace presents in 2024 of 673m², increasing to 1,991m² by 2028.

6.12 Assumed Net Vacant Floorspace

As outlined in Section 6.6.2 vacant floorspace was observed in each catchment area during the 2021 survey of retailing. In considering vacancy it is important to have regard to the fact that not all vacant floorspace will be occupied by retail floorspace. Some of this floorspace will be occupied by retail services and other uses. An assumed 75% of

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the identified floorspace will be utilised by other commercial uses (or to reflect an over-assessment of premises closed due to COVID-19, but not truly vacant), leaving 25% to be allocated across an assumed distribution of convenience, comparison non-bulky and comparison bulky. An assumption for allocating the uptake of vacant floorspace across the retail categories reflects the following: a 10% take up by convenience retailing, a 45% take up by comparison non-bulky and a 45% take up by comparison bulky goods. These rates reflect consideration of the higher floorspace utilisation by returning businesses post-COVID lockdown measures i.e. a single returning bulky goods retailer would typically avail of 2-3 times a convenience retailer. With comparison non-bulky held to account for the majority of closed retailers when assessed (thus sharing an equal loading with bulky goods).

When factored against the adjusted vacant floorspace (at 25% total), a distribution into each of the three retail categories of interest results. This is then reduced from gross to net using the same ratios established in Section 6.6.2. The adjusted vacant floorspace as assigned to each retail type for consideration against future requirements is set out below.

Table 6.16: Adjusted Vacant Floorspace by Assumed Retail Category Distribution

Adjusted Vacant Floorspace by Assumed Retail Distribution (incl. Gross to Net)				
Retail Category	**Assumed Distribution**	**Allocated Gross Vacant**	**Gross to Net Reduction**	**Allocated Net Vacant**
	%	**m²**	**Ratios**	**m²**
Limerick Catchment				
Convenience	10.0%	4,356.87	0.75	**3,267.65**
Comparison - Non-Bulky	45.0%	19,605.92	0.75	**14,704.44**
Comparison - Bulky	45.0%	19,605.92	0.85	**16,665.03**
Adjusted Vacant Floorspace	**100.0%**	**43,568.71**	**-**	**34,637.12**
Newcastle West Catchment				
Convenience	10.0%	523.38	0.75	**392.53**
Comparison - Non-Bulky	45.0%	2,355.19	0.75	**1,766.39**
Comparison - Bulky	45.0%	2,355.19	0.85	**2,001.91**
Adjusted Vacant Floorspace	**100.0%**	**5,233.75**	**-**	**4,160.83**

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When classified in this way, the assumed vacant floorspace can be factored against the identified future retail floorspace potential, to see by what amount, a reduced quantum of floorspace might be needed due to existing additional capacity.

Where possible additional retail floorspace needs will be targeted within existing vacant floorspace capacity on appropriately zoned lands. For large scale retail applications, the onus will be on the applicant to demonstrate as part of the sequential test assessment that existing vacant units within the retail core are not suitable, viable and available to accommodate a development.

6.13 Future Floorspace Potential – Adjusted for Vacancy

The quanta of identified future floorspace has been set out in Table 6.15 and Table 6.17. However, in considering the mitigating effect of existing vacant floorspace in each catchment area, these figures have been updated in Table 6.17 below.

It should be noted that while the figures now account for vacant floorspace, they do not include "pipeline supply". The extent of unimplemented floorspace is discussed in Sections 6.15 and is factored into requirements in Section 6.16.

Table 6.17: Indicative Future Retail Floorspace Potential (Cumulative) - Adjusted for Vacancy

Indicative Future Retail Floorspace Potential (Cumulative) - Adjusted for Vacancy			
Retail Goods Type	**Floorspace Capacity (m²)**		
	2024	**2026**	**2028**
Limerick Catchment			
Convenience Goods	13,708	19,545	25,433
Comparison Goods (Non-Bulky)	9,164	27,353	46,771
Comparison Goods (Bulky)	-9,747	-4,590	974
Total Retail Floorspace Potential	**13,124**	**42,308**	**73,178**
Newcastle West Catchment			
Convenience Goods	1,137	1,658	2,174
Comparison Goods (Non-Bulky)	-1,259	-316	640
Comparison Goods (Bulky)	-1,329	-695	-11
Total Retail Floorspace Potential	**-1,450**	**647**	**2,803**

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The resulting figures indicate that after accounting for vacancy in the Limerick Catchment:

— There will be increasing additional capacity for convenience floorspace, increasing from 13,708m² in 2024, to 25,433m² by 2028.
— There will be increasing additional capacity for comparison non-bulky floorspace, increasing from 9,164m² in 2024, to 46,771m² by 2028.
— There will be no additional need for comparison bulky floorspace by 2024. This gradually changes over the period, with a capacity of 974m² arising by 2028.

The resulting figures indicate that after accounting for vacancy in the Newcastle West Catchment:

— There is a small additional need for convenience floorspace in 2024 of 1,137m², increasing to 2,174m² by 2028.
— There is no additional capacity for comparison non-bulky floorspace in 2024. This does change over the period, with a moderate increase of 640m² by 2028.
— There is no additional capacity for comparison bulky floorspace across the period.

6.14 Future Pipeline Supply

The tables set out in the previous section do not account for "pipeline supply", i.e. extant planning permissions which have been permitted but not yet commenced or completed at the time of the preparation of the Retail Strategy.

An exercise was undertaken to identify and review planning applications which had been granted and were still within their permitted period of duration (with or without activity, as indicated by any associated commencement notices). The extent of this unimplemented floorspace is summarised below.

A cut-off date of February 2021 was used when undertaking this review of planning permissions. The figures are classified by those applications which were not yet commenced (Table 6.18) and those applications which have been commenced, but have not yet been completed (Table 6.19).

Table 6.18 outlines that 12,039.5m² has been granted but has yet to commence within the Limerick and Newcastle West Catchments. The majority of the floorspace is proposed within the MASP area of the Limerick Catchment, with the Newcastle West Catchment currently having only granted an additional 325m² of comparison retail space.

Table 6.19 states that 2,577m² of total floorspace has commenced but has not yet been fully completed. Figure 6-3 and Figure 6-4 illustrate the location of the proposed developments.

Table 6.18: Total floorspace for Granted but NOT Commenced Retail Planning Applications

Total floorspace for Granted but NOT Commenced Retail Planning Applications			
	Limerick Catchment	**Newcastle West Catchment**	**Both Catchment Areas**
Granted but NOT Commenced	m²		

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	11,714.5	325	12,039.5
Breakdown by Retail type			
Convenience	6,088.5	0	6,088.5
Comparison - Non-Bulky	595.4	325	920.4
Comparison-Bulky	0	0	0
Generic	5,030.6	0	5,030.6

Table 6.19: Total floorspace for Commenced but Not Completed Retail Planning Applications

Total floorspace for Commenced but Not Completed Retail Planning Applications			
	Limerick Catchment	**Newcastle West Catchment**	**Both Catchment Areas**
Granted and Commenced		m^2	
	2,577	0	2,577
Convenience	359	0	359
Comparison - Non-Bulky	2,218	0	2,218
Comparison-Bulky	0	0	0
Generic	0	0	0

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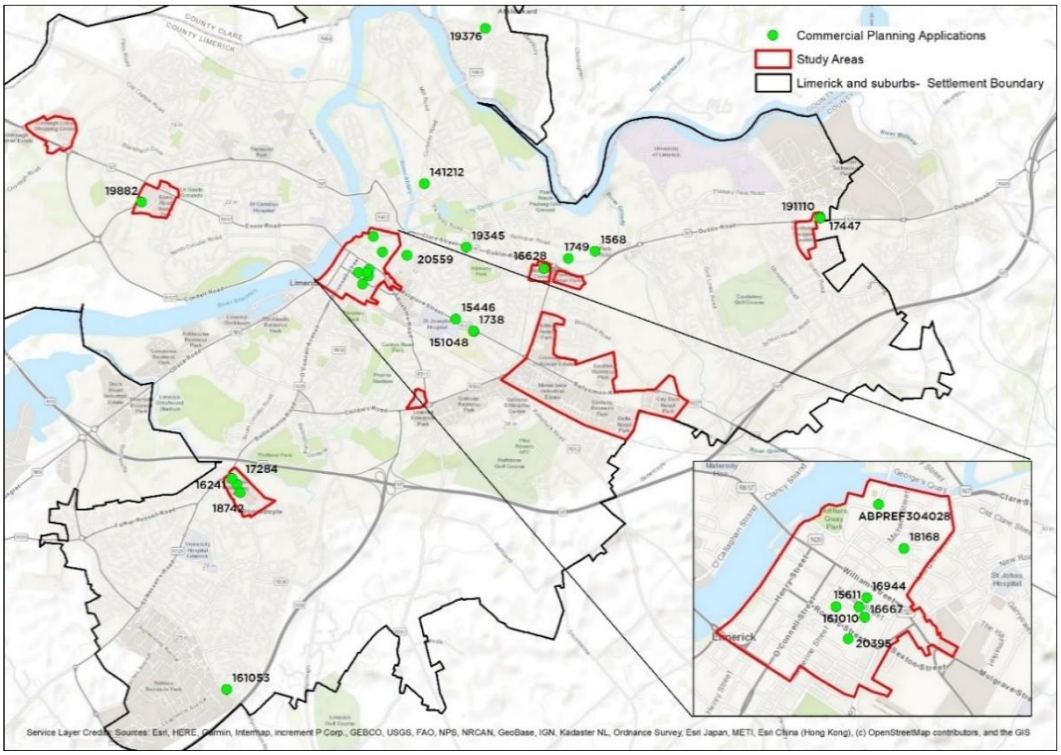


Figure 6-3: Commercial Planning Applications in MASP

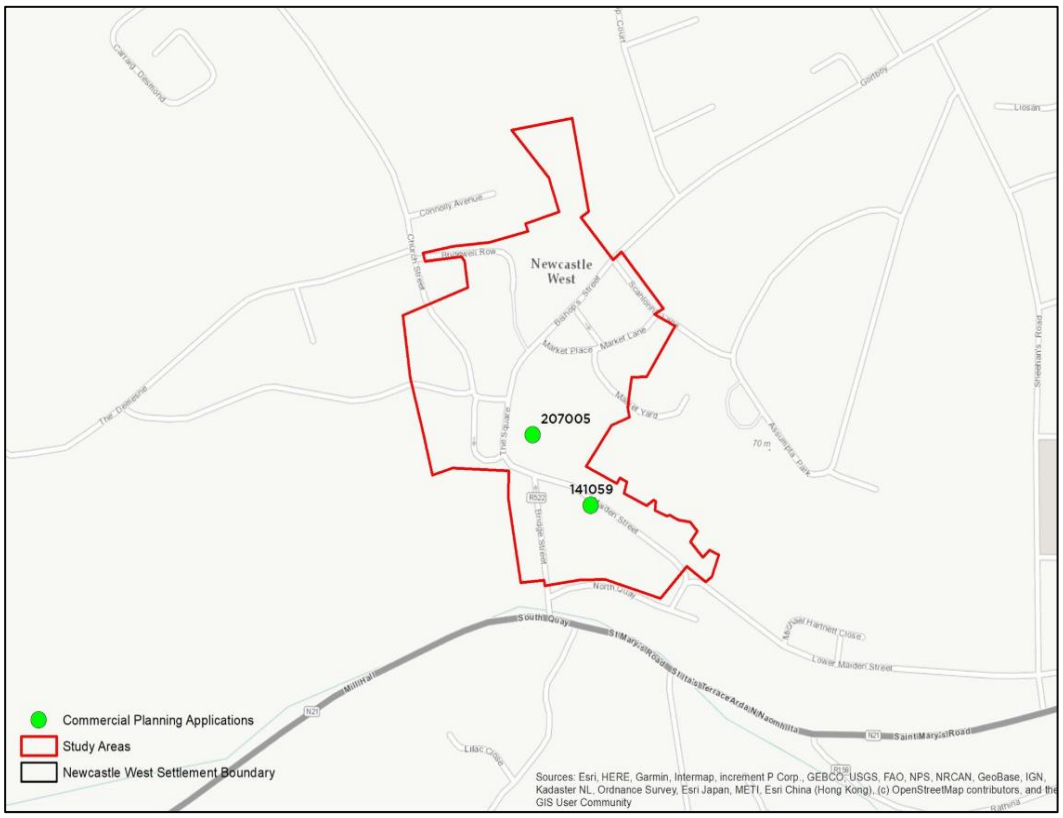


Figure 6-4: Commercial Planning Applications in Newcastle West

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6.15 Future Floorspace Potential – Adjusted for Vacancy and Pipeline Supply

Whereas identified vacant floorspace presents the most likely solution to future requirements, pipeline supply may also be considered, albeit, with less certainty, as it is subject to a myriad of delivery factor, which may delay or prevent it from being fully realised within the lifetime of the Retail Strategy. A number of these permitted schemes, if delivered, would have an impact on the identified requirements set out in Section 6.11 (for unadjusted requirements) and Section 6.13 (for requirements adjusted by vacancy). In some cases, this would increase the identified residual surplus of floorspace such that no further floorspace is necessary, in others, it would reduce requirements accordingly.

In exploring the impact of the pipeline supply, an assumed 50% delivery rate of extant permissions has been taken and the requirements, adjusted for vacancy, have been further adjusted below with this 50% in mind. Extant permissions classified as 'Generic Retail' (where the specific retail type was not specified) have been distributed across the retail types using the assumed rate of distribution applied to the assumed utilisation of vacant floorspace in Section 6.12. Table 6.20 below sets out the additive floorspace in this regard.

Table 6.20: Allocated Extant Permissions - Consideration of Planning Pipeline

Allocated Extant Permissions - Assumed 50% Delivery Rate of Pipeline and Distribution of 'Generic Retail Floorspace'						
Retail Type	**Granted m²**	**Commenced m²**	**50%**	**Rates**	**Distributed Generic Retail m²**	**Distributed Total Extant Permissions m²**
Limerick Catchment						
Convenience Goods	6,089	359	3,224	10%	252	**3,475.28**
Comparison Goods (Non-Bulky)	595	2,218	1,407	45%	1,132	**2,538.59**
Comparison Goods (Bulky)	0	0	0	45%	1,132	**1,131.89**
Generic Retail	5,031	0	2,515	100%	2,515	**7,145.75**
Newcastle Catchment						
Convenience Goods	0	0	0	10%	0	**0.00**
Comparison Goods (Non-Bulky)	325	0	163	45%	0	**162.50**
Comparison Goods (Bulky)	0	0	0	45%	0	**0.00**
Generic Retail	0	0	0	100%	0	**162.50**

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The quantum of future additional floorspace potential, adjusted for vacancy, was set out in Table 6.17. This has been adapted to incorporate the mitigating effect of an assumed 50% delivery of identified extant permissions as of February 2021 across the catchment areas, over the plan period. Consideration of the figures in Table 6.20 have been set out in Table 6.21 below, as the indicative future floorspace requirements adjusted for both vacancy and planning pipeline.

Table 6.21: Indicative Future Retail Floorspace Potential (Cumulative) - Adjusted for Vacancy and Pipeline

Indicative Future Retail Floorspace Potential (Cumulative) - Adjusted for Vacancy & Pipeline			
Retail Goods Type	**Floorspace Capacity (m²)**		
	2024	**2026**	**2028**
Limerick Catchment			
Convenience Goods	10,136	15,973	21,862
Comparison Goods (Non-Bulky)	6,568	24,758	44,176
Comparison Goods (Bulky)	-11,183	-6,026	-462
Total Retail Floorspace Potential	**5,521**	**34,705**	**65,575**
Newcastle West Catchment			
Convenience Goods	1,137	1,658	2,174
Comparison Goods (Non-Bulky)	-1,421	-478	477
Comparison Goods (Bulky)	-1,329	-695	-11
Total Retail Floorspace Potential	**-1,613**	**485**	**2,640**

6.16 Final Future Floorspace Potential

Having identified the quantum of floorspace capacity in each catchment area (Table 6.15), having also considered the utilisation of observed vacancy as a mitigating factor to those requirements (Table 6.17) and finally, having adjusted with regards to assumed realisable consented floorspace in the planning pipeline (Table 6.21), the final adjusted future floorspace potential for each catchment area can be set out.

6.16.1 Allocation within the Limerick Catchment Retail Area

Specific consideration of the identified requirements for the Limerick retail catchment area was required, in order to account for the relevant boundaries between both Local Authority areas, namely the catchment's shared area with County Clare.

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An allocation between both jurisdictions was agreed, reflecting a review of four key factors: *population share*, *retail hierarchy*, *retail mix* and *land-use/capacity* across the catchment.

As a result, it was agreed that 75% of Limerick Catchment's identified and adjusted future floorspace potential to 2028 would be allocated to Limerick City and County, with 25% of total catchment requirements allocated to County Clare.

Sub-allocations of the resulting floorspace quanta were then developed on the basis of the three retail category types and between the Metropolitan and non-Metropolitan sections of the Limerick Catchment area (i.e. excludes Newcastle West Catchment).

For the section of the Limerick Catchment covering the Metropolitan (in Limerick), an allocation of 60% of the resulting convenience retail potential was assigned, with 40% to the section covering the non-Metropolitan Areas of Limerick, the Catchment 'remainder' (outside of the Metropolitan Area in Limerick, but excluding the Newcastle West Catchment).

Similarly, 65% of comparison non-bulky was assigned to the Metropolitan Area, with 35% to the remainder and finally, an even 50% assignment was given to comparison bulky.

These sub-allocations again reflected the review of the four factors set out above.

6.16.2 Final (Allocated) Future Floorspace Potential

Accounting for the agreed allocations, the final future floorspace potentials per retail category have been set out in Table 6.22 in terms of summary residual capacity – adjusted for vacancy and assumed realisable consented development as of the time of drafting.

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Table 6.22: Final Future Retail Floorspace Potential (Cumulative) - Adjusted for Vacancy and Pipeline

Final Future Retail Floorspace Potential (Cumulative) - Adjusted for Vacancy & Pipeline			
Retail Goods Type	**Floorspace Capacity (m²)**		
	2024	**2026**	**2028**
[1] Limerick Catchment - MASP			
Convenience Goods	4,561	7,188	9,838
Comparison Goods (Non-Bulky)	3,202	12,069	21,536
Comparison Goods (Bulky)	-4,193	-2,260	-173
Total Retail Floorspace Potential	**3,570**	**16,998**	**31,200**
[2] Limerick Catchment - County Remainder			
Convenience Goods	3,041	4,792	6,558
Comparison Goods (Non-Bulky)	1,724	6,499	11,596
Comparison Goods (Bulky)	-4,193	-2,260	-173
Total Retail Floorspace Potential	**571**	**9,031**	**17,981**
[3] Newcastle West Catchment			
Convenience Goods	1,137	1,658	2,174
Comparison Goods (Non-Bulky)	-1,421	-478	477
Comparison Goods (Bulky)	-1,329	-695	-11
Total Retail Floorspace Potential	**-1,613**	**485**	**2,640**
[1]+[2]+[3] County Limerick Total (excl. Limerick Catchment Overlap into Clare)			
Convenience Goods	8,740	13,638	18,570
Comparison Goods (Non-Bulky)	3,505	18,090	33,609
Comparison Goods (Bulky)	-9,716	-5,214	-357
Total County Retail Floorspace Potential	**2,528**	**26,514**	**51,822**

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6.16.3 Distribution of Floorspace within Limerick City and District Centres

The retail hierarchy under Table 2.4 and 7.2 outlines guidance for the distribution of future retail floorspace within the Metropolitan Area. This sub-hierarchy was created, further dividing the Limerick-Shannon Metropolitan Area into Tier 1 (Limerick City Centre) and Tier 2 (other noteworthy retail centres such as Dooradoyle and Castletroy). Future retail expansion within the suburban District Centres will be carefully controlled so that they progressively develop and do not have any adverse impacts upon Limerick City Centre.

6.16.3.1 Limerick City Centre

It is essential to maintain the vitality and viability of Limerick City Centre by consolidating the core retail area to ensure any future retail development is directed towards this area in the first instance. Facilitating the reuse of vacant buildings or under-utilised sites throughout the City Centre and considering improvements to the public realm within the City Centre will help achieve a vibrant retail sector that supports investment and renewal in the core area. This will enhance its status as the primary retail centre in the region. Expansion of retail provision within the core retail area is a key aim over the lifetime of this plan.

6.16.3.2 Crescent Shopping Centre

The future expansion of the Crescent Shopping Centre will be subject to a coordinated approach by Limerick City and County Council as this centre offers a very strong retail experience which contrasts with the multiple uses and functions that Limerick City Centre provides. It is not considered appropriate to support significant expansion of retail floorspace in the shopping centre but limited expansion where it does not have an adverse impact on Limerick City Centre should be considered. However, planning policy should not restrict the centre adapting to contemporary challenges and evolving in terms of its functionality.

6.16.3.3 Parkway Shopping Centre/ Parkway Retail Park

Additional floorspace is not envisaged under this plan for the Parkway Shopping Centre and Parkway Retail Park. However, the council should consider the limited expansion of the Parkway Shopping Centre/Retail Park ensuring that there will be no direct negative impact on Limerick City Centre.

6.16.3.4 Roxboro Shopping Centre

The priority for Roxboro Shopping Centre is to reduce the current levels of vacancy and rejuvenate the existing centre to increase attractiveness. No additional floorspace is envisaged and the primary function is to remain predominately convenience with no identifiable role as a comparison retail destination.

6.16.3.5 Castletroy Shopping Centre

Castletroy should remain predominately convenience retail and should not develop into a primarily comparison goods retail destination. No significant expansion of comparison floorspace in Castletroy shopping centre is envisaged over the lifetime of this plan.

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However, the centre shall be considered for limited expansion where it does not have an adverse impact on Limerick City Centre.

6.16.3.6 Caherdavin (Jetland Shopping Centre)

Caherdavin shall only be considered for limited expansion where appropriate. The centre should not develop into a primarily comparison goods retail destination. The Jetland Shopping Centre should only be expanded where the proposed development does not have a negative impact on Limerick City Centre.

As noted in Table 6.22 the Limerick MASP catchment has a floorspace capacity of 31,258 m^2 up to 2028. While the vast majority of this floorspace will be directed towards the city centre there will be a potential need to increase floorspace within the district centres to meet the growing population within the suburbs. Furthermore, it is a priority to limit expansion of comparison retailing within the district centres in order to enhance the vitality and viability of the Limerick City Centre retail core.

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7 Retail Planning Policies and Criteria for Assessment of Retail Development

This chapter draws upon the qualitative and quantitative analysis to provide policy direction and guidance to be included in the Limerick Development Plan 2022-2028. The Retail Hierarchy identified in Section 7.1 informs the direction of retail scale and type in the county. The Core Retail Areas for each of the settlements within the Retail Hierarchy are mapped, Opportunity Sites are identified. This analysis has utilised relevant development plans and Local Area Plans to identify opportunity sites.

7.1 Retail Settlement Hierarchy

As outlined in Section 2, the purpose of the Retail Hierarchy is to indicate the level and form of retailing activity appropriate to the various urban centres of the county to enable the Council to protect each centre's overall vitality and viability, whilst allowing each centre to perform its overall function within the county's settlement hierarchy.

The retail hierarchy for Limerick – Shannon Metropolitan Area and County Limerick 2022-2028 is set out in Table 7.1 and Table 7.2:

Table 7.1: Limerick Retail Hierarchy

Tier	Level	Location	Status
Tier 1 - City Centre	-	Limerick City Centre	City Centre
Tier 2 - Major Town Centres	-	Newcastle West	Key Service Town
Tier 3 - Town Centres	Level 1	Abbeyfeale	Service Town
	Level 2	Adare	Service Town
		Kilmallock	Service Town
		Rathkeale	Service Town
Tier 4 - Large Villages	Level 1	Castleconnell	Large Villages
		Caherconlish	Large Villages
	Level 2	Askeaton	Large Villages
Tier 5 – Local/Corner Shops	-	Smaller villages/crossroads – rural shops (post offices, creameries, public houses, filling stations, etc.)	Local/Corner Shops

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Table 7.2: Limerick - Shannon Retail Hierarchy

Tier	Level	Location	Status
Tier 1 - City Centre	-	Limerick City Centre	City Centre
Tier 2 - Major Town Centres	Level 1	Dooradoyle (Crescent shopping centre)	District Centre
		Shannon (Skycourt shopping centre)	Metropolitan Town
		Caherdavin (Jetland shopping centre)	District Centre
		Castletroy	District Centre
		Parkway	District Centre
		Roxboro	District Centre
		Moyross	District Centre

7.2 Core Retail Areas and Retail Opportunity Sites

The Retail Planning Guidelines (2012) define retail area as “that part of a Town Centre which is primarily devoted to shopping”. Core retail areas contain the primary retail streets of a centre where the main concentration of retail activity takes places. New retail development will be preferred and encouraged within the core retail areas, with an emphasis on the primary retail streets in particular to be retained as the key locations for retail development.

In accordance with the Retail Planning Guidelines (2012) it is also necessary to identify ‘Opportunity Sites’ which are considered appropriate for future retail development within or adjacent to the core and secondary retail areas within the identified settlements. The identification of appropriate opportunity sites will further enhance and maintain the vitality and viability of the main retail centres of the county, should applications for retail development materialise in the future.

Furthermore, these sites should be examined and addressed in a sequential approach before any site further from the retail core is proposed for consideration. In keeping with the sequential approach, a focus on encouraging retail occupancy of vacant premises located within the retail core should be prioritised in the first instance. Opportunity sites may or may not be necessary in some settlements depending on results from the floorspace survey which will indicate where additional retail development needs to occur.

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7.2.1 Limerick

Figure 7.1 illustrates the opportunity sites identified for potential retail development in Limerick City. Within Limerick City 5 no. opportunity sites have been identified as being suitable for retail development. Table 7.3 corresponds to Figure 7-1 and provides a development potential description for each of the individual opportunity sites.

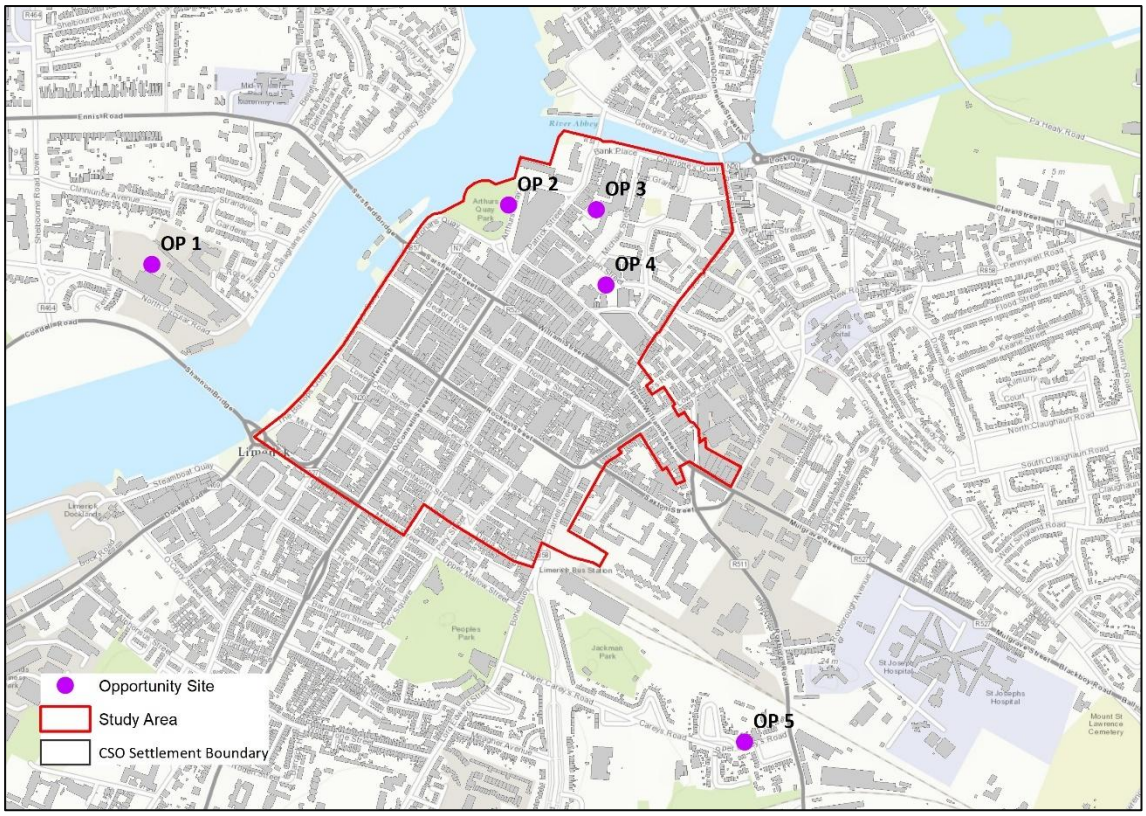


Figure 7-1: Limerick Opportunity Sites

Table 7.3: Limerick Opportunity Sites Development Potential

Settlement	Opportunity site	Development Potential
Limerick		
	OP1 Cleeves Riverside Campus	The Cleeves Riverside Campus is proposed at the former Cleeves factory site near O'Callaghan Strand in Limerick City. The campus development will comprise a large-scale mixed use residential and office, education and cultural/ visitor attraction on a brownfield site zoned City Centre.
	OP2 Arthur's Quay	Under the Limerick 2030 Plan, Arthur's Quay will be transformed through major redevelopment of the existing Arthur's Quay

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Settlement	Opportunity site	Development Potential
		Shopping Centre and adjoining lands, to provide a new mixed-use retail, residential, leisure and office development. A new City Square will be created connecting across O'Connell Street to Cruises Street. The redevelopment of Arthur's Quay will secure the City's role as a premier retail destination, increasing visitors, footfall and spin off benefits for restaurants, hotels, tourism and culture destinations.
	OP3 Ellen St. Surface Car Park	The brownfield site zoned City Centre is located in a prime City Centre location, opposite the Opera Site. Development of these underutilised lands would contribute to the overall revitalisation of this area of the City, which has suffered from dereliction and decline over recent years. Development of this site would facilitate improvements to the visual amenities of Ellen Street, which is a key tourist route linking O'Connell Street to the Milk Market.
	OP4 Opera Site	Project Opera on a 1.62ha. site zoned City Centre will be a landmark commercial development. Works have commenced on the development which will consist primarily of commercial offices supported by a range of retail and non-retail services, an Apart Hotel and new City Library in the historic Georgian Town Hall.
	OP5 Colbert Quarter	The Land Development Agency is preparing plans for the development of the proposed Colbert Station Quarter. The Colbert Station Spatial Framework Strategy 2021 – 2041, which is currently being prepared, will aim to develop a 69-hectare brownfield site zoned City Centre. The Colbert Station site has the capacity for the development of a walkable neighbourhood of new homes for 6,300 people, employment, education, retail, health, transport and leisure facilities, with a connected public realm and high quality architectural design to characterise and punctuate the area.

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7.2.2 Shannon

Figure 7.2 highlights Shannon's settlement boundary as defined by the CSO. The town settlement is adjacent to the Shannon Free Zone and Shannon International Airport. One opportunity site has been identified in Shannon. This site is known as the 'Special Development Zone' and potential development is described in Table 7.4.



Figure 7-2: Shannon opportunity sites

Table 7.4: Shannon Opportunity Sites Development Potential

Settlement	Opportunity site	Development Potential
Shannon	OP1 Shannon Special Development Zone	This large site represents a possible expanded Town Centre core retail area to the north of Bothar Mór. It is considered that a building of large scale is required here in order to ensure visibility from the N19 and to provide an important landmark and reference point for the Town Centre. It is also envisaged that an appropriate tenant(s) for this large building would generate a significant volume of footfall to and from it and the existing Town Centre to the south of An Bothar Mór.

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7.2.3 Newcastle West

Newcastle West settlement boundary is illustrated on Figure 7.3. Two opportunity sites have been identified which have the potential to support retail development. Table 7.5 outlines the development potential for both opportunity sites.

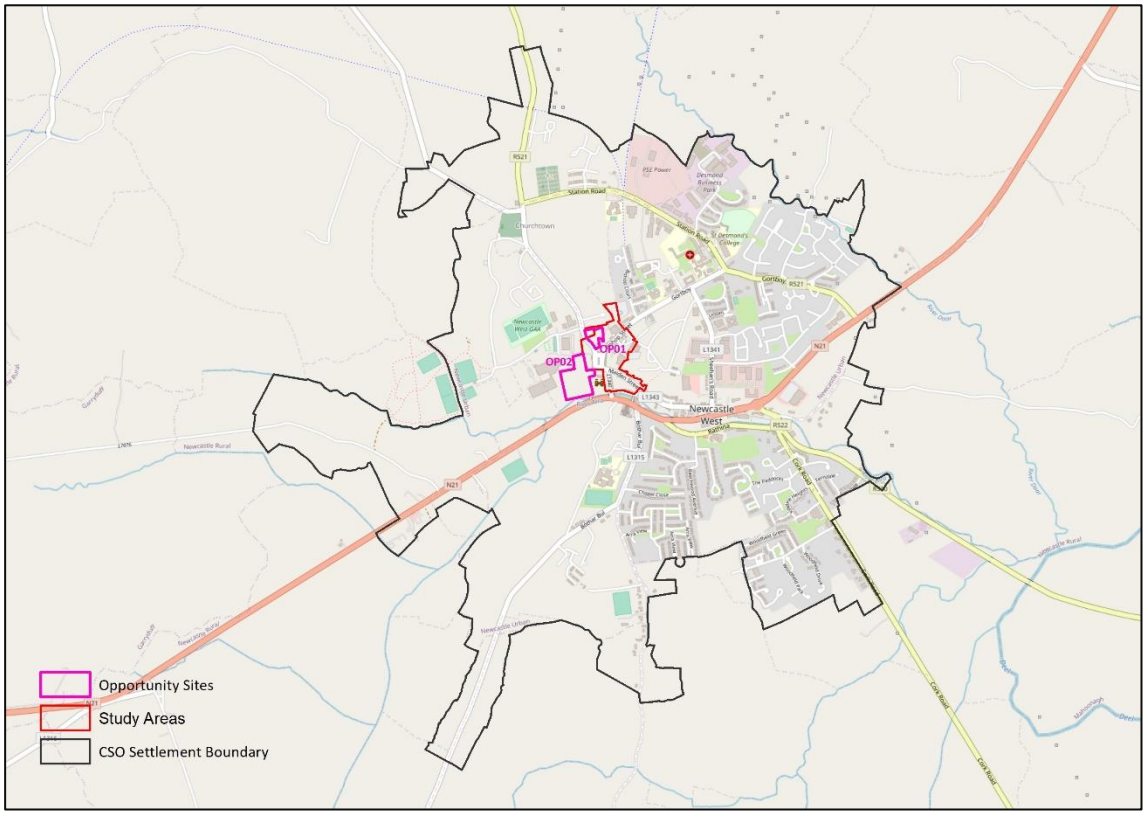


Figure 7-3: Newcastle West opportunity sites

Table 7.5: Newcastle West Opportunity Sites Development Potential

Settlement	Opportunity site	Development Potential
Newcastle West	OP1 Lands to rear of Church Street and Bishop's Street	Any proposal should maximise the opportunity of the existing pedestrian access at Bridewell Lane and access to the existing car park. Desirable re-development of the site includes, a mix of residential units, tourist related services, small scale tourist accommodation, small scale office development, retail, or a civic facility for the arts such as studios or small theatre. New buildings shall generally be single storey or two storey, simple and consistent in design with the traditional streetscape. Sensitive contemporary design is open to consideration.

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Settlement	Opportunity site	Development Potential
	OP2 Nash Backlands, The Square and Castle Demesne	The site is zoned for Town Centre. Given its strategic location in relation to the retail core and its considerable size, the site presents significant potential for reinforcing the use, function and character of the Town Centre. The site would provide an opportunity for significant retailing opportunities.

7.3 Planning Policies, Objectives and Criteria for Assessment of Retail Development

7.3.1 Limerick

In order to shape and guide retailing in the study areas, a number of retail objectives have been developed. In formulating and adhering to these objectives, Limerick City and County Council will look to ensure that the development of all future retail floorspace is carried out in accordance with the requirements of the Retail Planning Guidelines. In addition, these objectives can be seen to form a single integrated and coherent strategic policy framework (with Clare County Council), which will ensure that all development within the Limerick Shannon Metropolitan Area is carried out in keeping with the principles of sustainable development.

The objectives outlined below have built on those of the preceding Retail Strategy and have been created with the aim of supporting the expansion of the retail offering of County Limerick and the Limerick Shannon Metropolitan Area in a sustainable manner. They have been formulated to:

I. Ensure that County Limerick and the Limerick Shannon Metropolitan Area possesses a clear policy framework that will inform both the conception and assessment of retail development proposals and help to guarantee that the strategic and local convenience and comparison retailing needs of the County are met;
II. Maintain and where possible, enhance the existing competitiveness of retail in Limerick City and the main towns, by facilitating the development of additional retail floorspace where it can be clearly established that such development will result in tangible improvements to the retail offering of the County/Limerick Shannon Metropolitan Area;
III. Acknowledge the importance of the district shopping centres in providing a wide range of both convenience and comparison shopping in locations close to centres of population;
IV. Acknowledge the importance of service settlements, villages, rural serviced settlements and hinterlands in suburban and rural locations in meeting local shopping needs. To encourage the improvement to the designs of local retail centres in suburban areas and rural villages, including the provision of facilities in the public realm;

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V. Encourage reductions in floorspace vacancy, taking account of suitability, obsolescence and the identification of alternative uses for existing vacant floorspace within the urban centres of the County;
VI. Encourage and facilitate the re-use and regeneration of derelict land and buildings for retail uses, with due cognisance to the Sequential Approach as indicated in the Retail Planning Guidelines;
VII. Address leakage of retail expenditure from the County to competing centres by providing the means to strengthen the range and quality of its retail offer; and,
VIII. Engage with the relevant stakeholders and incentivise to ensure that the environmental attractiveness of Town/Local Centres is enhanced.

7.3.1.1 General Strategy

General retail planning objectives for the County and Limerick Shannon Metropolitan Area are:

Objective LCC01: It is an objective of the Council that retail development should support the achievement of National Planning Framework Objectives NPO 5 to develop cities and towns of sufficient scale and quality to compete internationally and to be drivers of national and regional growth, investment and prosperity and NPO 6 to regenerate and rejuvenate cities, towns and villages of all types and scale as environmental assets, that can accommodate changing roles and functions, increased residential population and employment.

Objective LCC02: It is an objective of the Council to protect and promote a vibrant retail sector as an integral part of Limerick City Centre's economy, that supports investment and renewal in the core area and enhances its status as the primary retail centre in the region.

Objective LCC03: It is an objective of the Council to ensure that all retail development permitted accords with the relevant requirements and criteria as established within the Retail Planning Guidelines for Planning Authorities 2012 and the Retail Strategy for Limerick Shannon Metropolitan Area and County Limerick 2022-2028.

Objective LCC04: It is an objective of the Council to permit retail development within the City and Town Centres of a size and scale which is appropriate to the level of the settlement, including its population, as defined within the retail hierarchy.

Objective LCC05: It is an objective of the Council to promote and protect the core retail areas of Limerick City Centre and main towns as the preferred locations for retail development.

Objective LCC06: The preferred location for new retail development where practicable and viable is within existing Town Centres (including District or Village Centres).

Objective LCC07: The Council shall promote the utilisation of vacant commercial buildings in City and Town Centre locations as a preferred location for new retail investment. The Council shall promote a creative and proactive approach to unit expansion and amalgamation to address modern retail requirements.

Objective LCC08: It is an objective of the Council to prohibit new retail development if they would (either by themselves or cumulatively with other developments) negatively

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impact the vitality and viability of existing retail centres within the County and Limerick Shannon Metropolitan Area.

Objective LCC09: When assessing retail planning applications, it will be the objective of the Council to have regard to the findings of the capacity assessment contained in the Retail Strategy for the Limerick Shannon Metropolitan Area and County Limerick 2022-2028, including the ability to counteract expenditure leakage. The onus will be on any applicant to demonstrate in a Retail Impact Assessment that the proposed floorspace is appropriate, having regard to the quantum of floorspace required within that specific urban centre or settlement, in addition to evidencing all other relevant variables, as specified within the Retail Planning Guidelines.

Objective LCC10: The Council shall resist applications for planning permission which would result in a net loss of retail floorspace at ground level on primary retail streets within the core retail area, where this would affect the vitality and viability of these streets. However, applications for change of use to non-retail commercial/service development for vacant units shall be considered, where it clearly enhances the vibrancy and attractiveness of the area.

Objective LCC11: The Council will encourage alternative, short or interim measures to improve the visual appearance of vacant or derelict properties, including the use of attractive window graphics, shutter covers and hoardings and use for non-retail commercial activity that is appropriate for street frontage.

Objective LCC12: The Council will encourage the consolidation of other non-retail-based services within Town Centres, utilising existing vacant retail floorspace where necessary. This will aid in enhancing the vitality of Town Centres, encouraging them to maintain their role as employment locations in addition to reducing the proportion of vacant floorspace and recognising the value which non-retail uses can contribute to the local economy, through the provision of employment and general economic benefit.

Objective LCC13: It is an objective of the Council to introduce measures to improve the accessibility of and experience of City and Town Centres by developing a pedestrian and cyclist friendly environment, which improves safety and limits car traffic domination where possible.

Objective LCC14: In accordance with the Retail Planning Guidelines (2012), there shall be a presumption against new out-of-town retail warehousing development.

Objective LCC15: The Council shall require that applications for new supermarkets on Local Centre sites shall be accompanied by a Retail Impact Assessment.

Objective LCC16: Proposals for new supermarket developments in Local/Neighbourhood Centre sites should support the sustainable upgrade of Local/Neighbourhood Centres and facilities and demonstrate that they facilitate improved access to public transport and/or cycling and walking for their catchment in accordance with the Retail Planning Guidelines (2012).

Objective LCC17: Develop a ‘Shopfront Improvement Scheme’ to improve the design, quality and coherence of shop signage for all Town Centres, though the provision of guidance and grant funding enable owners to make improvements to their buildings/shopfronts.

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Objective LCC18: Support retailers in developing online service offer, consumer delivery strategies, collection/distribution hubs and click and collect capacity.

Objective LCC19: To support and accommodate the growth of 'Click and Collect' retail services and grocery home shopping as appropriate.

7.3.1.2 Limerick City Centre Strategy

Objective LCS01: Protect and promote the City Centre's role as a National Tier 1 City Centre at the top of the Mid-West hierarchy. Retail is an integral part of the City's economy, complementing its inherent strengths including innovation, enterprise, tourism, culture and services and has an important array of amenities, vibrancy, liveability/quality of life and a quality-built environment.

Objective LCS02: Support and enhance the role of Limerick City Centre as the primary retail centre in the Limerick Shannon Metropolitan Area and Mid-West Region in accordance with the objectives of the National Planning Framework and Regional Spatial and Economic Strategy for the Southern Region.

Objective LCS03: Ensure proposals which would undermine the vitality and viability of Limerick City Centre will not be permitted. The sequential approach to retail development set out in the Retail Planning – Guidelines for Planning Authorities (2012) will be strictly enforced, in the interests of supporting the City Centre at the top of the retail hierarchy. Any retail development in the District or Local Centres or Retail Warehousing zone shall comply with this Retail Strategy.

Objective LCS04: Encourage the development of substantial new retail floorspace in the City Centre and extensions thereto, in order to support the regeneration of the City Centre in parallel with other initiatives.

Objective LCS05: To focus on regenerating the traditional City Centre areas, with a view to creating more attractive, desirable places that people want to live and spend time in, for work, shopping or recreational purposes.

Objective LCS06: To promote Limerick City Centre as a compact, attractive and walkable urban core.

Objective LCS07: To promote the development of brownfield opportunity sites identified in Chapter 3 of the Limerick Development Plan 2022-2028.

Objective LCS08: Encourage and support investment and improvement in the public realm (new attractive hard landscaping/paving, planting and street furniture) complementing URDF investment under the Limerick 2030 plan and investment in the Georgian Quarter and Waterside improvements.

Objective LCS09: To encourage the expansion of the core retail area, reuse of vacant buildings and/or under-utilised sites throughout the City Centre and creative proposals for activation of usage, particularly on the periphery of the City Centre area.

Objective LCS10: In areas adjacent/contiguous to the retail core to support the diversity of non-retail uses at street level where such uses attract customers that complement the vitality, vibrancy and activity that brings linked trips to the City Centre.

Objective LCS11: To develop a retail street strategy that defines the character of City Centre streets for particular retail activities, services and cultural activities.

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Objective LCS12: For the Council to work in partnership with City Centre business and retail groups, to support short-term measures to promote City Centre vibrancy and initiatives for the marketing and promotion of the City Centre as a retail experience, including a 'retail charter' that provides a shared commitment to achieve a high quality retail experience.

Objective LCS13: Develop a 'shop front guide' to improve the design and quality of shop signage throughout the City Centre, through the provision of guidance and grant funding that enable owners to make improvements to their buildings/shopfronts.

Objective LCS14: Support retailers and businesses within the City Centre to promote the 'Purple Flag' area and a diverse offer of lifestyle uses and services that enhance the City Centre experience.

Objective LCS15: Develop digital initiatives for multi-channel synergy between the retail, service and cultural offer of the City Centre that promotes diverse commercial and cultural experience unique to the City Centre, with support services such as click and collect and a co-ordinated approach to social media engagement.

7.3.1.3 Limerick Shannon MASP Area Strategy

Objective MASP01: Convenience Retail Floor Space:
It is an objective of the Council to ensure emphasis remains to attract high quality convenience retail to the City Centre. However, there is a demand for new convenience floor space within established residential areas and within neighbourhood areas with growing residential communities and regeneration sites. This shall include:

— City Centre;
— Moyross;
— Ballysimon;
— Southern Environs.

Objective MASP02: Local/Neighbourhood Centres:

It is an objective of the Council to:

a) Only consider the enlargement of existing Local/Neighbourhood Centre retail sites where it can be demonstrated that it serves a substantial residential catchment within walking distance of the centre and has a tangible urban renewal benefit for the community. Suitable floorspace areas of new convenience food stores in these locations are generally permitted to be up to 1,800m² of net retail space.
b) Promote the development of new Local/Neighbourhood Centres at Mungret, Ballysimon and Old Cork Road to serve a growing population within their catchment.
c) Require all proposed retail developments in Local/Neighbourhood centres to demonstrate compliance with the floor space capacity requirements set out in this strategy. A retail impact assessment shall be carried out for all developments in excess of 1,000m².

Objective MASP03: Dooradoyle (Crescent Shopping Centre) (Tier 2 Level 1):

— Support reinvestment, upgrading and consolidation of retail floorspace within the Crescent Shopping Centre where it does not alter its role and function with respect to Limerick City Centre and the retail hierarchy.

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— Limited additional retail floor space and services will be permitted and reinvestment and upgrade works supported at the Crescent. However, there is significant scope to provide for an improved civic amenity.

Objective MASP04: District Centres (Tier 2, Level 2):

— The role and scale of the District Centres as primarily convenience shopping centres capable of supporting a main food shopping trip will be maintained.
— Reinvestment and regeneration of existing District Centres will be supported, but only provided where it does not change their role and scale.
— District Centres should remain primarily convenience goods and service centres and should not develop into primarily comparison goods retail destinations.
— District Centres should not be allowed to expand significantly above the 10,000 sqm (net) size threshold set out in the Retail Planning Guidelines for Planning Authorities.
— To support opportunities for brownfield redevelopment to support mixed-use sustainable urban development for day and evening use, which include retail, residential, commercial, civic and other uses. This will ensure that a mix of uses is facilitated by a district level centre that would complement the uses of the City Centre, having regard to the principles of compact growth, consolidation and densification. Any such development considerations should account for high levels of accessibility, including pedestrian, cyclists and public transport (where feasible).
— Retail proposals at District Centre level which would undermine the vitality and viability of Limerick City Centre should not be permitted.

Objective MASP05: Roxboro Shopping Centre:

— Support the rejuvenation and upgrading of Roxboro Shopping Centre primarily as a convenience destination.

Objective MASP06: Castletroy Shopping Centre:

— Support reinvestment, upgrading and consolidation of retail floorspace within the Castletroy Shopping Centre, where it does not alter its role and function with respect to Limerick City Centre and the retail hierarchy.

Objective MASP06: Parkway Shopping Centre and Retail Park:

— Support reinvestment, upgrading and consolidation of retail floorspace within the Parkway Shopping Centre, where it does not alter its role and function with respect to Limerick City Centre and the retail hierarchy.
— Consider the limited expansion of the Parkway Shopping Centre/Retail Park, ensuring that there will be no direct negative impact on Limerick City Centre.

Objective MASP07: Shannon:

— Support the continuing improvement of retail facilities in Shannon Town Centre through the delivery of the adopted masterplan.
— To improve on and enhance the vitality and viability of the Town Centre and increase its competitiveness with other retail destinations.

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— To support opportunities for brownfield redevelopment to support mixed-use sustainable urban development.
— In areas adjacent/contiguous to the core retail area to support the diversity of non-retail uses at street level where such uses attract customers that complement the vitality, vibrancy and activity that brings linked trips to the Town Centre.
— Maintain the vitality and viability of the Skycourt Shopping Centre by consolidating investment in the shopping centre.
— Encourage and facilitate the reuse of vacant units/sites throughout the town and shopping centre.
— Support the Shannon Special Development Area objectives to create a strengthened viable and vibrant Town Centre supporting a quality, varied retail offer with improved physical appearance, connectivity and the development of a 'streetscape'.
— Support a 'Shopfront Improvement Scheme' Planning Guidance Note outlining eligibility, grant funding, design principles criteria etc. to encourage use of the scheme.

7.3.1.4 Newcastle West

— Support the improvement of retail facilities in Newcastle West Town Centre through the provision of modern shop units and a growth in floorspace.
— To support opportunities for brownfield redevelopment to support mixed-use sustainable urban development.
— To improve on and enhance the vitality and viability of the Town Centre and increase its competitiveness with other retail destinations.
— In areas adjacent/contiguous to the core retail area support the diversity of non-retail uses at street level where such uses attract customers that complement the vitality, vibrancy and activity that brings linked trips to the Town Centre.

7.4 Criteria for Assessment of Retail Development

In accordance with the Retail Planning Guidelines for Planning Authorities all applications for significant development should be assessed against a range of criteria as set out below.

7.4.1 The Sequential Test

All applications for retail developments at edge-of-centre or out-of-centre locations (i.e. outside of the defined core retail areas) will be subject to the sequential test. The 2012 Retail Planning Guidelines has formulated the order of priority for retail development, which is outlined below.

City and Town Centre

"The order of priority for the sequential approach is to locate retail development in the city/town centre (and district centre if appropriate) and only to allow retail development in edge-of-centre or out-of-centre locations where all other options have been exhausted".

Edge-of-Centre Sites

"Where retail development in an edge-of-centre site is being proposed, only where the applicant can demonstrate and the Planning Authority is satisfied that there are no sites or potential sites including vacant units within a city or town centre or within a designated

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district centre that are (a) suitable (b) available and (c) viable, can that edge-of-centre site be considered".

Out-of-Centre Sites
"Where retail development on an out-of-centre site is being proposed, only in exceptional circumstances where the applicant can demonstrate and the Planning Authority is satisfied that there are no sites or potential sites either within the centre of a city, town or designated district centre or on the edge of the city/town/district centre that are (a) suitable (b) available and (c) viable, can that out-of-centre site be considered".

7.4.2 Retail Impact Assessments

Retail Impact Assessments will be required for significant retail development where due to its scale and/or location it may impact on the vitality and viability of centres. Significant retail development constitutes development proposals for both comparison and convenience type development of:

- Greater than 1,000m² of net floorspace outside of Limerick City Centre (within MASP), Shannon and Newcastle West.
- Greater than 500m² in all other settlements.
- Or where Limerick City and County Council considers the development may impact on the vitality and viability of the City or a Town Centre.

These assessments will be prepared in accordance with the current Retail Planning Guidelines, which requires an applicant to address the following criteria and demonstrate whether or not the proposal would:

- Support the long-term strategy for City/Town Centres as established in the Development Plan and not materially diminish the prospect of attracting private sector investment into one or more such centres.
- Have the potential to increase employment opportunities and promote economic regeneration.
- Have the potential to increase competition within the area and thereby attract further consumers to the area.
- Respond to consumer demand for its retail offering and not diminish the range of activities and services that a centre can support.
- Cause an adverse impact on one or more centres, either singly or cumulatively with recent developments or other outstanding planning permissions (which have a realistic prospect of implementation), sufficient to undermine the quality of the centre or its wider function in the promotion and encouragement of the arts, culture, leisure, public realm function of the Town Centre critical to the economic and social life of the community.
- Cause an increase in the number of vacant properties in the primary retail area that is likely to persist in the long term.
- Ensure a high standard of access both by public transport, foot and private car so that the proposal is easily accessible by all sections of society.

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— Link effectively with an existing City/Town Centre so that there is likely to be commercial synergy.

7.4.3 Traffic and Transport Assessments

A Traffic and Transport Assessment (TTA) may be required for retail developments outside of Town Centre sites over a particular threshold (1,000m²), as set out in the *Traffic Management Guidelines* 2003 and the *Traffic Transport Assessment Guidelines* 2014.

A TTA must examine the transport impacts of a proposed development, incorporating any subsequent measures necessary to ensure roads, junctions and other transport infrastructure in the vicinity of the development are adequate to accommodate the proposed development without causing additional delays to existing and future road-based traffic. More importantly, TTA is important in demonstrating how to encourage a shift towards sustainable travel modes by those using the retail development in question.

Applicants for retail development which exceed these thresholds should consult the guidelines above prior to lodging a planning application. Where traffic and transport volumes from proposed retail developments are under the thresholds for TTA outlined above, the guidelines should be consulted in regard to the criteria for sub threshold TTA. The TTA should also address urban design impacts of proposed public and private transport proposals and also deal with delivery and monitoring regimes for the various options. If the proposed development warrants an Environmental Impact Assessment (EIA), the transport assessment should form part of the EIAR.

7.4.3.1 Design Quality

The 2012 Retail Planning Guidelines are accompanied by the Retail Design Manual (April 2012). The Manual provides Planning Authorities, developers and designers with evidence-based quality principles to ensure that future planning for the retail sector is focussed on the creation of vibrant, quality places.

7.4.4 Criteria for the Assessment of Different Development Types

7.4.4.1 Large Convenience Stores

New large convenience stores should be located within City and Town Centres or within designated District Centres that serve a large residential community where possible. Edge of centre locations for such developments may be appropriate where there is limited room for expansion within an existing Town Centre, as the urban grain of many Town Centres do not lend themselves to being suitable for larger form convenience stores. This is acknowledged in the Retail Planning Guidelines as follows:

"*In certain limited circumstances however, it may not be possible to bring forward suitable sites in or on the edge of a City or Town Centre because of the site requirements of large convenience goods stores, heritage constraints in historic towns, or because the road network does not have the capacity to accommodate additional traffic and service vehicles. In these cases, the sequential approach should be used to find the most preferable sites.*"

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However, any out of centre proposals for this form of retail development requires careful assessment and will need to fully satisfy compliance with the sequential test. Accessibility is also a key consideration for such developments and as such it is imperative that proposals for large convenience stores are accessible by all modes of transport, including pedestrians and by public transport.

Within Limerick/Shannon MASP a retail floorspace cap of 3,500m² for large convenience good stores will be applied. For County Limerick excluding the Limerick/Shannon MASP, a retail floorspace cap of 3,000m² for large convenience goods stores will be applied. This applies to new stores as well as to extensions of existing retail units. For a large-scale proposal encompassing both convenience and comparison goods no such cap will apply. In these instances, the application drawings should clearly delineate the floorspace to be attributed to the convenience and comparison shopping types. The balance between the convenience and comparison element of the proposed store drawings is a critical element in the assessment of the suitability of the development proposal. Where a significant element of the store is indicated to be for comparison goods, the potential impact of that element of the store on existing comparison goods stores within the catchment area will be considered in the assessment of the application.

7.4.4.2 Retail Warehouses

In accordance with the Retail Planning Guidelines there should be **a presumption against the further development of out of town retail parks** and a preference for sites in or adjacent to Town Centres, to ensure the potential for linked trips and commercial synergy. Key criteria for the assessment of retail warehouse applications include scale and design of the development, appropriate vehicular access and the quantitative need for such development.

In accordance with the Retail Planning Guidelines the following caps on floorspace of such retail development shall be applied (gross floorspace quoted including storage and garden centres):

— Individual retail units should not be less than 700m².
— Individual retail units shall not be more than 6,000m² in size (gross floorspace including storage and garden centres).

Accordingly, proposed exceptions to the 6,000m² retail warehouse cap may be considered on the merits of individual development applications in Limerick/Shannon MASP area. Any individual large-scale retail warehouse proposals in excess of 6,000m² within the Limerick/Shannon MASP area must demonstrate that the proposal:

a) Will accommodate predominantly bulky goods under one roof, together with a range of customer facilities (e.g. restaurant, crèche), on a scale which requires a regional, if not a national, population catchment.

b) Is in accordance with the Planning Guidelines on Spatial Planning and National Roads, in that the proposal can demonstrate that the development will not adversely affect the efficiency of the national road network and key junctions and interchanges and that it can be demonstrated that traffic volumes can be accommodated within the design assumptions for such roads, taking account of the opportunities for encouraging a modal shift towards more sustainable travel modes.

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c) Will be served by existing or planned public transport services.

d) Will make adequate provision for those opting for home delivery of goods other than by private car.

e) Will be accompanied by a traffic impact assessment, demonstrating compliance with the above criteria, and

f) Will take account of the vitality/viability criteria in respect of City/Town Centres set out in these Guidelines and avoid the incorporation of uses and activities, as part of the development, which are more appropriate to City and Town Centre locations.

Furthermore, the range of goods sold shall be restricted by planning condition to bulky goods as those defined within Annex 1 of the Retail Planning Guidelines. These include, but are not limited to, household appliances, bulky pet products, tools and equipment for the house and garden, furniture and furnishings.

Within proposals for such retail development, the proportion of ancillary retail floorspace associated with otherwise bulky good items shall not exceed 20% of the total net retail floorspace of the unit. The planning application drawings should clearly delineate the provision of floorspace associated with each retail type so that the Council can make a full assessment.

7.4.4.3 Factory Shops

Factory shops, commonly located as part of or adjacent to the production facility, should be restricted by way of condition to the sale of products produced by the associated factory, unless situated within the core retail area of the centre in which it is located. Proposals for individual factory shops may be appropriate, provided the scale of the shop is appropriate to its location and raises no issues in relation to the vitality and viability of nearby urban centres.

7.4.4.4 Outlet Centres

The Retail Planning Guidelines define outlet centres as “groups of stores retailing end-of-season or discontinued items at discounted prices and are typically located in out-of-centre locations”. The success of these centres depends on drawing customers and visitors from a wide catchment area, including tourists and as such there may be implications for existing tourist centres and established Town Centres.

The assessment of such retail development should focus on whether such a development is located in a strategic location to capture expenditure from a very wide catchment area.

Moreover, it is the duty of the applicant to demonstrate that the products sold will not be in competition with those currently on sale in typical Town Centre locations within the County.

Nonetheless, outlet centres within or immediately adjacent to a City or Town Centre can generate commercial synergies with the established retail outlets, thus raising the profile of the centre and enhancing aggregate turnover on retail goods and leisure activities, resulting in economic benefits for the overall area.

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In accordance with the Retail Planning Guidelines, outlet centres in County Limerick will not be permitted in more remote out-of-town locations.

7.4.5 Local Shops

Local shops play a vital role in catering for the daily needs of nearby residents or of those passing by. Primarily convenience outlets, local shops provide a readily accessible service for basic goods, often for the less mobile members of communities.

The planned development of such local shops should be encouraged in large or growing residential catchments. Such developments should be designed to a high standard and be easily accessible to all members of society.

7.4.6 Retailing and Motor Fuel Stations

Local shops attached to petrol filling stations are a growing sector of the retail market. However, the size of the shop associated with any petrol filling station should take account of the fact that large shops can attract additional custom, large numbers of cars can cause disruption and the preferred location for retailing is in Town Centres.

The Retail Planning Guidelines state that the size of such retail units should not exceed 100m². Therefore, where applications made for retail units associated with a petrol filling station are in excess of 100m² the sequential approach to retail development will apply.

7.4.7 Retailing in Small Towns and Villages

Small towns, villages and local centres play an important role in the retail hierarchy, fulfilling the everyday needs of the communities they serve. Retail development should be focused in the centres, or edge-of-centres, of these small towns and villages and should complement the existing retail provision. They should also be located in areas of high accessibility to the areas they serve.

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8 Conclusion

This Retail Strategy has been prepared in the extraordinary and unique context of the COVID-19 Pandemic, with unparalleled challenges for the economy and services sector in particular.

National planning policy has long emphasised the integral link between City/Town Centre vibrancy and a healthy retail sector. The NPF and RSES further underline the importance of City and Town Centres as a focus for regeneration and providing desirable places for people to live, work and visit. This is supported by significant public investment in urban infrastructure and amenities. This Retail Strategy finds that while convenience retailing remains strong, there are significant challenges for the comparison retail sector in the study area. However, projected growth in expenditure for the plan period highlights that there is an opportunity for resilient places to re-position themselves to the demands of the contemporary retail market. This entails a more diverse Town and City Centre, where a dynamic service, cultural and social offer are vital to support an attractive retail experience.

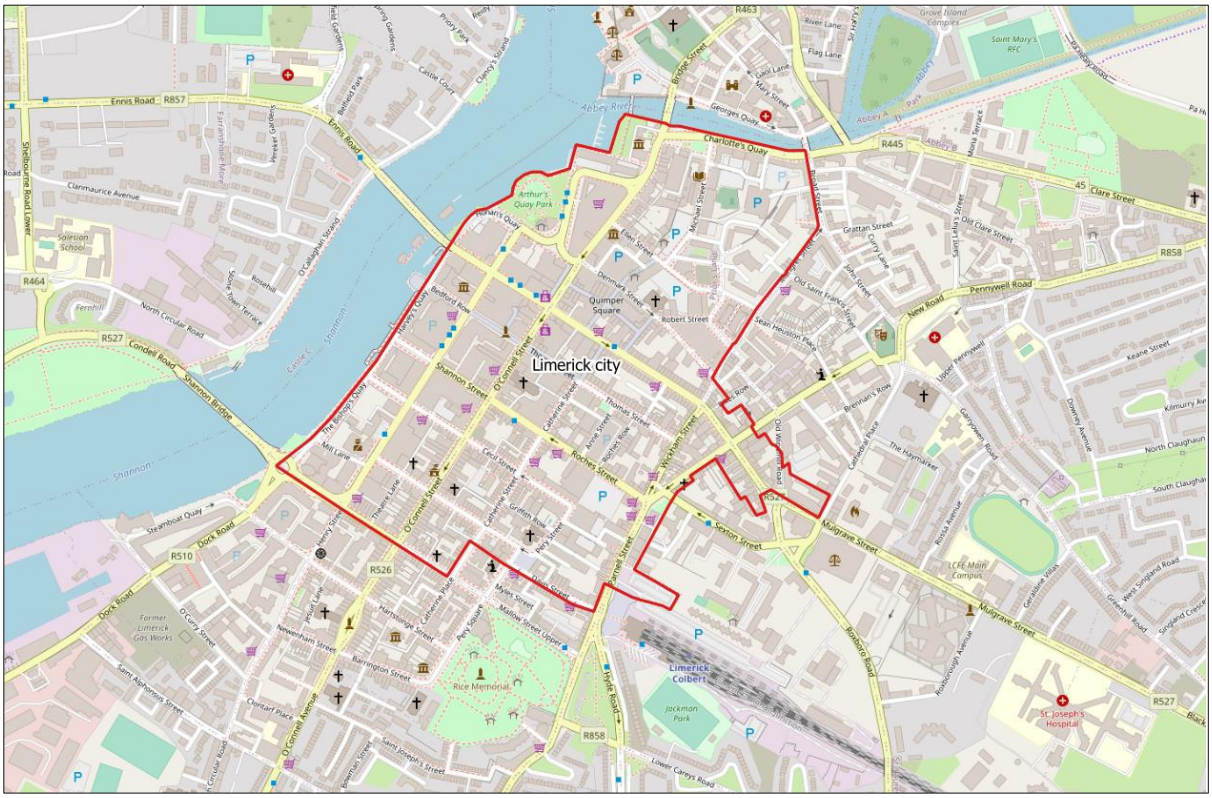
The growth in expenditure identified in this study is identified as an important opportunity to channel retail and commercial investment that reverses vacancy trends and supports regeneration of our urban areas. While the nature of retail is constantly evolving, it remains a vital part of sustainable urban centres.

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A Appendix

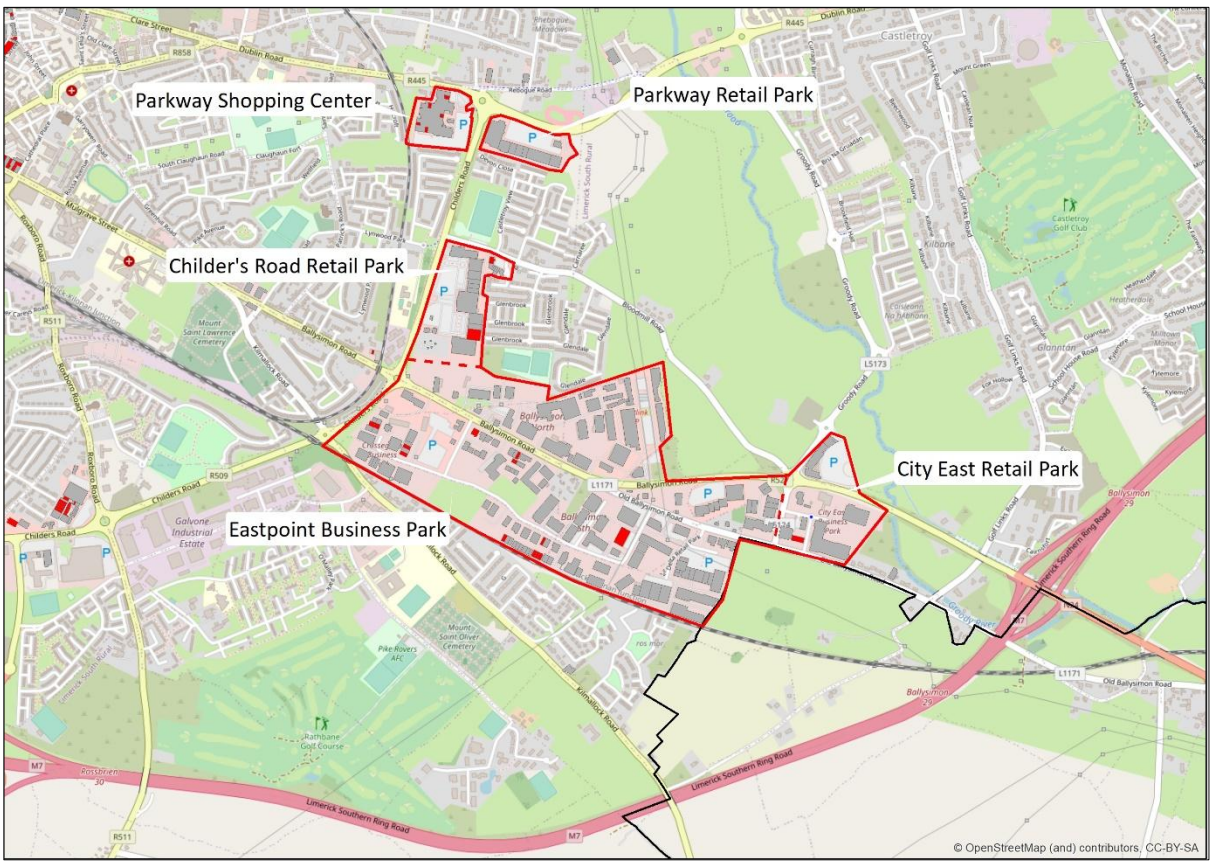
A.1 Retail Study Areas



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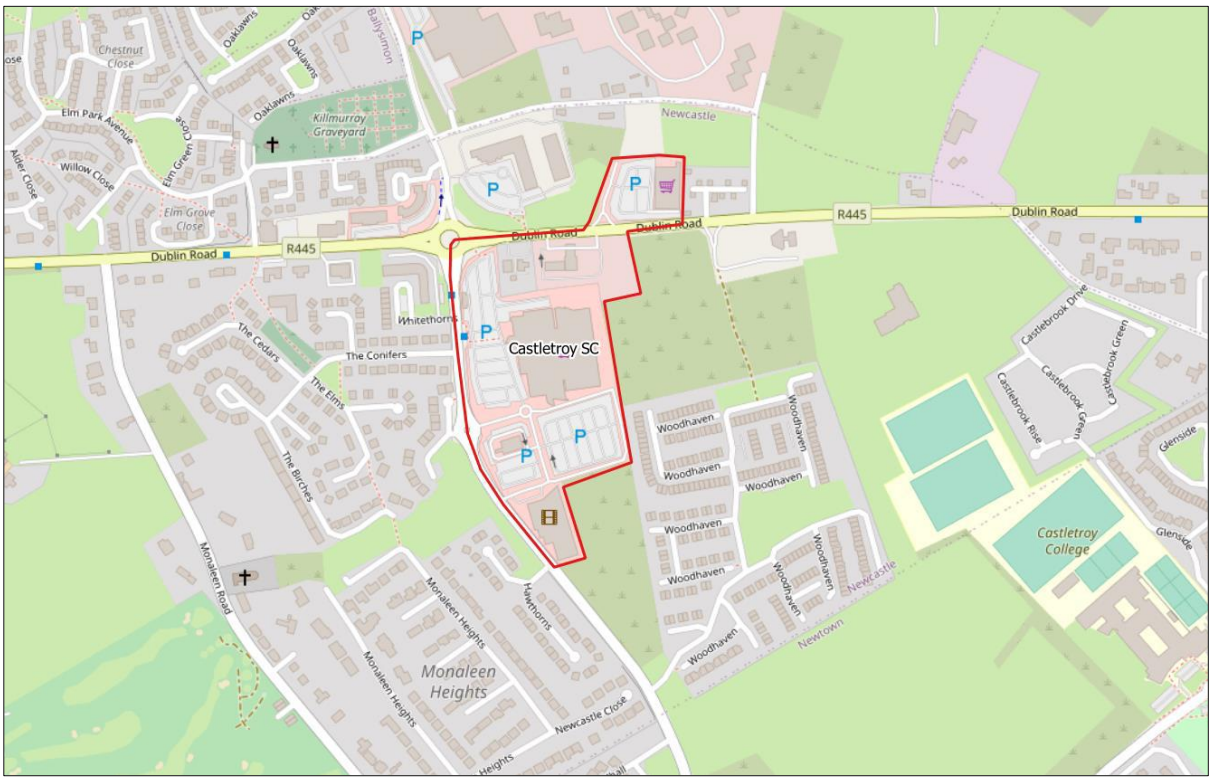




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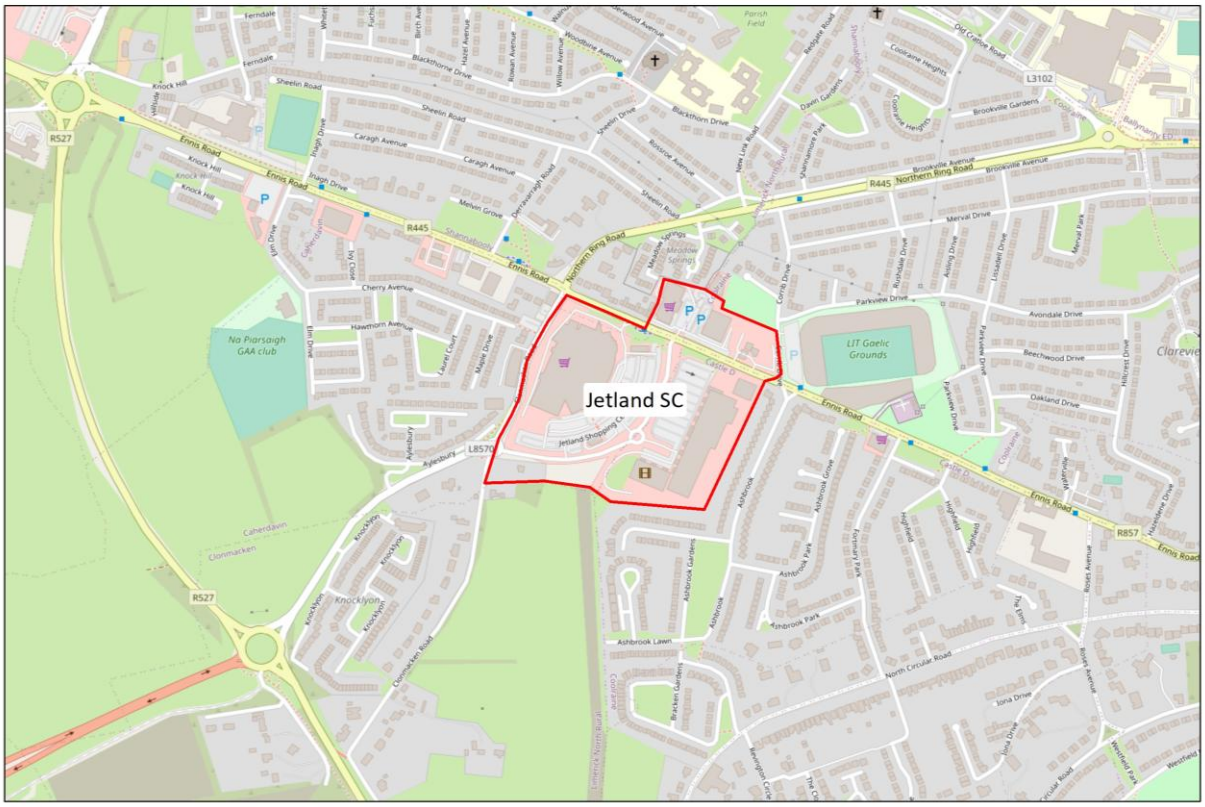
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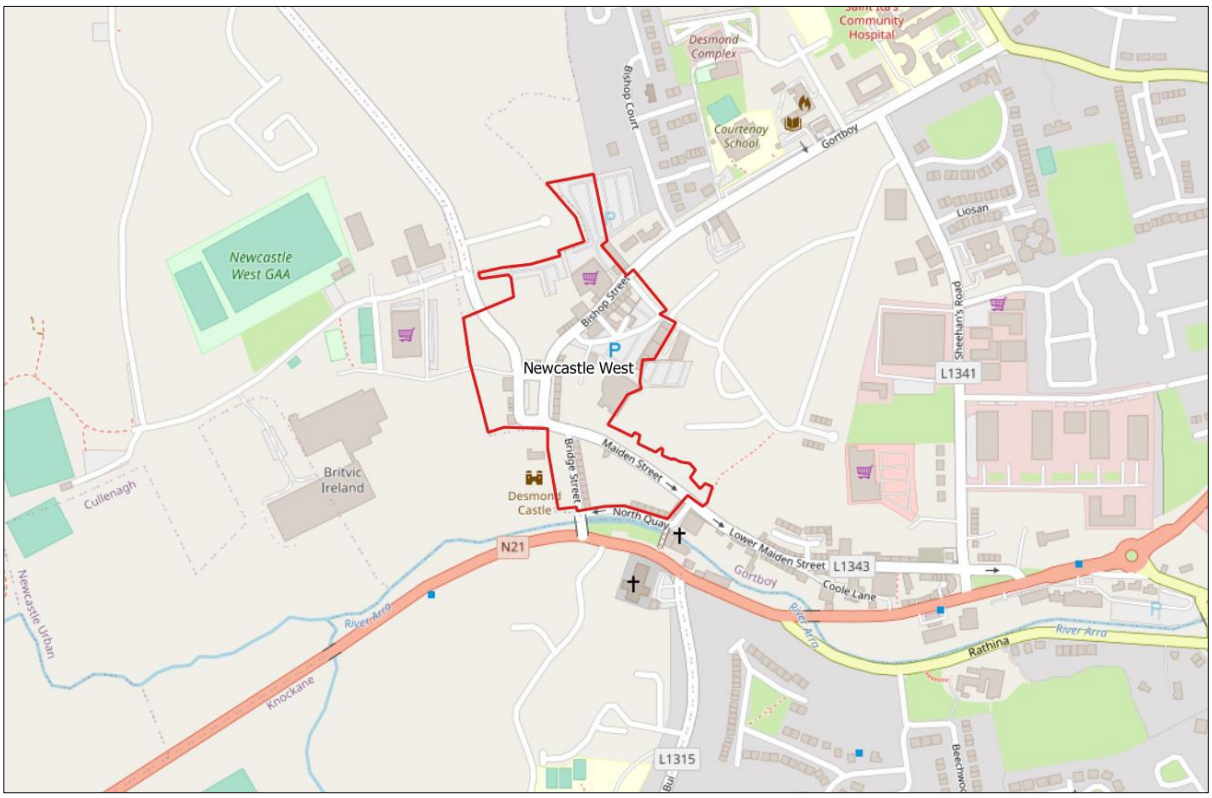
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A.2 Retail Floorspace Assessment

A.2.1 Desktop Retail Floorspace Assessment - Geodirectory

To ensure a consistent and methodological approach in the desktop assessment of retail floorspace, the same process was applied to each of the catchment areas (with reference for the purpose of example made here to the Newcastle West Study Area). Data from different sources was compiled in GIS software including OSI Building outlines, Geodirectory occupancy and vacancy data, Study Area delineations and CSO Settlement boundaries.

Certain retail categories were filtered from Geodirectory dataset and grouped into Bulky, Convenience and Comparison retail types. The table below presents the selected retail activities in line with the NACE description and their retail type categorization used in the floorspace analysis.

Table 8.1: Retail NACE Description and Categorisation

Retail	TYPE
RETAIL SALE OF CARPETS, RUGS, WALL AND FLOOR COVERINGS IN SPECIALISED STORES	Bulky
RETAIL SALE OF ELECTRICAL HOUSEHOLD APPLIANCES IN SPECIALISED STORES	Bulky
RETAIL SALE OF FURNITURE, LIGHTING EQUIPMENT AND OTHER HOUSEHOLD ARTICLES IN SPECIALISED STORES	Bulky
RETAIL SALE OF HARDWARE, PAINTS AND GLASS IN SPECIALISED STORES	Bulky
RETAIL TRADE OF MOTOR VEHICLE PARTS AND ACCESSORIES	Bulky
SALE OF MOTOR VEHICLE PARTS AND ACCESSORIES	Bulky
RETAIL SALE OF TEXTILES IN SPECIALISED STORES	Comparison
RETAIL SALE OF AUDIO AND VIDEO EQUIPMENT IN SPECIALISED STORES	Comparison
RETAIL SALE OF BOOKS IN SPECIALISED STORES	Comparison
RETAIL SALE OF CLOTHING IN SPECIALISED STORES	Comparison
RETAIL SALE OF COMPUTERS, PERIPHERAL UNITS AND SOFTWARE IN SPECIALISED STORES	Comparison
RETAIL SALE OF COSMETIC AND TOILET ARTICLES IN SPECIALISED STORES	Comparison
RETAIL SALE OF FOOTWEAR AND LEATHER GOODS IN SPECIALISED STORES	Comparison
RETAIL SALE OF GAMES AND TOYS IN SPECIALISED STORES	Comparison
RETAIL SALE OF INFORMATION AND COMMUNICATION EQUIPMENT IN SPECIALISED STORES	Comparison
RETAIL SALE OF MEDICAL AND ORTHOPAEDIC GOODS IN SPECIALISED STORES	Comparison
RETAIL SALE OF MUSIC AND VIDEO RECORDINGS IN SPECIALISED STORES	Comparison
RETAIL SALE OF OTHER GOODS IN SPECIALISED STORES	Comparison
RETAIL SALE OF SECOND-HAND GOODS IN STORES	Comparison
RETAIL SALE OF SPORTING EQUIPMENT IN SPECIALISED STORES	Comparison
RETAIL SALE OF TELECOMMUNICATIONS EQUIPMENT IN SPECIALISED STORES	Comparison
RETAIL SALE OF WATCHES AND JEWELLERY IN SPECIALISED STORES	Comparison
DISPENSING CHEMIST IN SPECIALISED STORES	Comparison
RETAIL SALE IN NON-SPECIALIZED STORES WITH FOOD, BEVERAGES OR TOBACCO PREDOMINATING	Convenience
RETAIL SALE OF BEVERAGES IN SPECIALISED STORES	Convenience
RETAIL SALE OF BREAD, CAKES, FLOUR CONFECTIONERY AND SUGAR CONFECTIONERY IN SPECIALISED STORES	Convenience
RETAIL SALE OF FISH, CRUSTACEANS AND MOLLUSCS IN SPECIALISED STORES	Convenience
RETAIL SALE OF FLOWERS, PLANTS, SEEDS, FERTILISERS, PET ANIMALS AND PET FOOD IN SPECIALISED STORES	Convenience
RETAIL SALE OF FOOD, BEVERAGES AND TOBACCO IN SPECIALISED STORES	Convenience
RETAIL SALE OF FRUIT AND VEGETABLES IN SPECIALISED STORES	Convenience
RETAIL SALE OF MEAT AND MEAT PRODUCTS IN SPECIALISED STORES	Convenience
RETAIL SALE OF NEWSPAPERS AND STATIONERY IN SPECIALISED STORES	Convenience
RETAIL SALE OF TOBACCO PRODUCTS IN SPECIALISED STORES	Convenience
RETAIL SALE VIA STALLS AND MARKETS	Convenience
OTHER RETAIL SALE IN NON-SPECIALISED STORES	Comparison
OTHER RETAIL SALE OF FOOD IN SPECIALISED STORES	Convenience
OTHER RETAIL SALE OF NEW GOODS IN SPECIALISED STORES	Comparison

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Building polygons GIS datasets were intersected with Geodirectory point data information that highlighted the buildings within the study area that were classified for retail use. See map below for an example of retail building identification in Newcastle West.

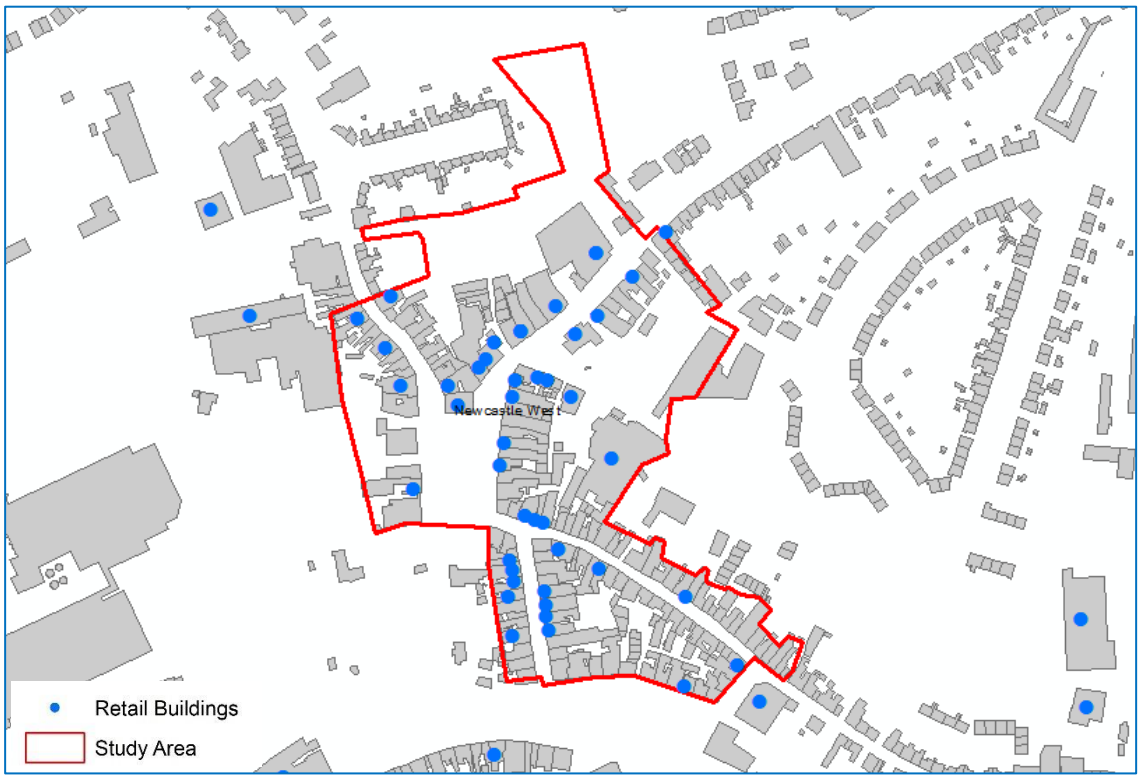


Figure 8-1: Retail Buildings Identified within Study Area of Newcastle West

The same procedure was applied, where vacant address information from the Geodirectory database was intersected with buildings outlines to retrieve information about vacant floorspace. This identification of vacant addresses is not limited to buildings with retail use, as it only records vacant floorspace.

The map below indicates all buildings with vacant floorspace, in context with retail building use within the study area. The retail building and vacant building point data was subsequently intersected with the building outline dataset to identify buildings for which floorspace calculations were conducted.

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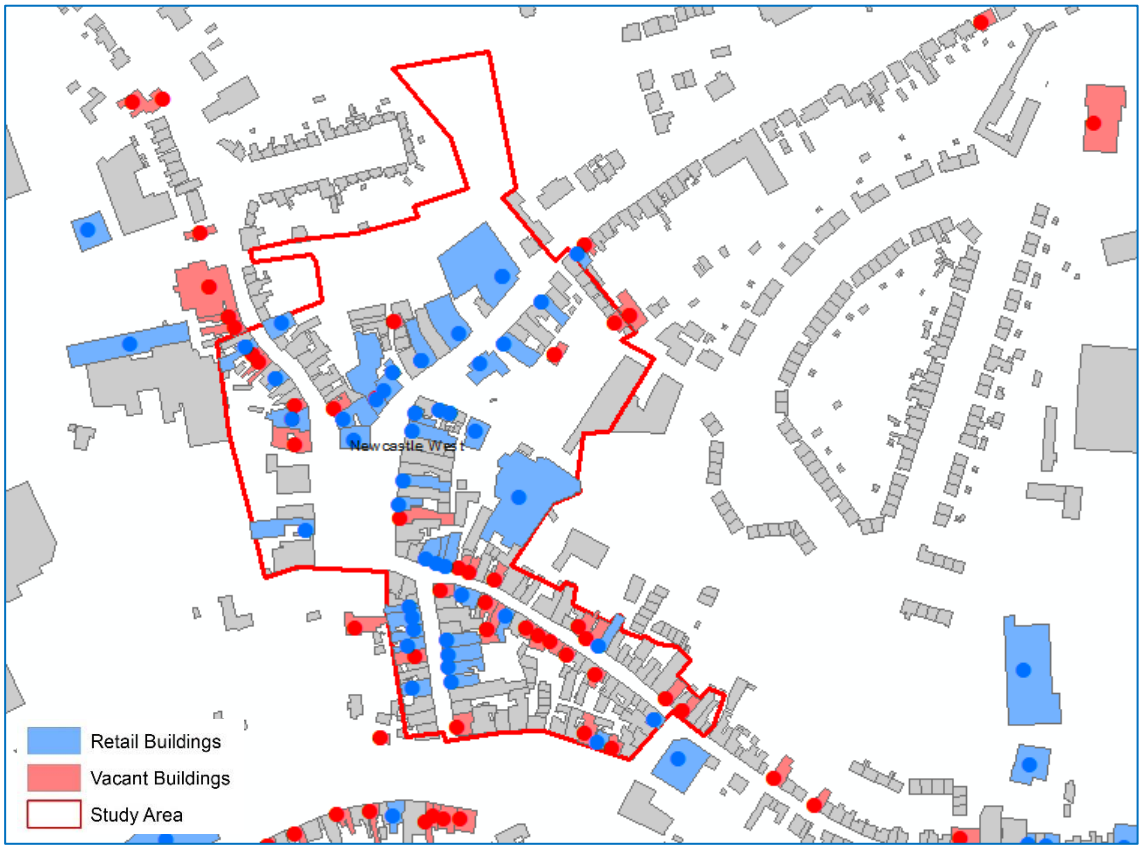


Figure 8-2: Retail and Vacant Buildings Identified within Study Area of Newcastle West

After intersecting those datasets attribute tables were extracted for further analysis. The table below presents a summary of information available from the data extracted.

Table 8.2: Example of Data Attribute Table

Newcastle_Floorspace_Poly

ITM_EAST	ITM_NORTH	ORGANISAT	CATEGORY	NACE_CODE	Type
528827.5	633652.7	TESCO	RETAIL SALE IN NON-SPECIALIZED STORES WITH FOOD, BEVERAGES OR TOBACCO PREDOMINATING	G.47.11	Convenience
528850.196	634201.819	DAAR WOOD PHARMACY	DISPENSING CHEMIST IN SPECIALISED STORES	G.47.73	Comparison
528627.088	634182.824	CORNER DELI	OTHER RETAIL SALE OF FOOD IN SPECIALISED STORES	G.47.29	Convenience
528719.667	633481.973	X-ARMY STORE	RETAIL SALE OF OTHER GOODS IN SPECIALISED STORES	G.47.70	Comparison
528454.997	633762.603	CORCORANS FURNITURE AND CARPETS LIMITED	RETAIL SALE OF FURNITURE, LIGHTING EQUIPMENT AND OTHER HOUSEHOLD ARTICLES IN SPECIALISED STORES	G.47.59	Bulky
527377.703	632313.391	WISHING WELL NURSERIES	RETAIL SALE OF FLOWERS, PLANTS, SEEDS, FERTILISERS, PET ANIMALS AND PET FOOD IN SPECIALISED STORES	G.47.76	Convenience
527990.283	633753.592	TIM'S SHOE CENTRE	RETAIL SALE OF FOOTWEAR AND LEATHER GOODS IN SPECIALISED STORES	G.47.72	Comparison
528046.331	633735.557	VIRGO	RETAIL SALE OF CLOTHING IN SPECIALISED STORES	G.47.71	Comparison
528305.648	633663.891	RECESSION FUELS	OTHER RETAIL SALE OF NEW GOODS IN SPECIALISED STORES	G.47.78	Comparison
528302.251	633720.691	LIDL	RETAIL SALE IN NON-SPECIALIZED STORES WITH FOOD, BEVERAGES OR TOBACCO PREDOMINATING	G.47.11	Convenience
528094.061	633668.079	ADRENALIN SPORTS & CYCLES	RETAIL SALE OF SPORTING EQUIPMENT IN SPECIALISED STORES	G.47.64	Comparison
528080.361	633691.121	MARGUERITES	RETAIL SALE OF BREAD, CAKES, FLOUR CONFECTIONERY AND SUGAR CONFECTIONERY IN SPECIALISED STORES	G.47.24	Convenience
527922.434	633633.665	O'SULLIVAN'S PHARMACY	DISPENSING CHEMIST IN SPECIALISED STORES	G.47.73	Comparison
528045.8	633678.011	DELICATE LINGERIE	RETAIL SALE OF CLOTHING IN SPECIALISED STORES	G.47.71	Comparison
527934.94	633710.117	ALL SEASONS	RETAIL SALE OF CLOTHING IN SPECIALISED STORES	G.47.71	Comparison
528221.754	633599.651	VINCENT'S	RETAIL SALE OF SECOND-HAND GOODS IN STORES	G.47.79	Comparison
528362.8	633614.9	TOM	RETAIL SALE OF ELECTRICAL HOUSEHOLD APPLIANCES IN SPECIALISED STORES	G.47.54	Bulky
528316.232	633615.464	SHOP C NUTRITION CLUB	OTHER RETAIL SALE OF FOOD IN SPECIALISED STORES	G.47.29	Convenience
528305.264	633616.265	CASH 4 CLOTHES	RETAIL SALE OF SECOND-HAND GOODS IN STORES	G.47.79	Comparison
527786.425	633618.919	OBJEKT	RETAIL SALE OF FURNITURE, LIGHTING EQUIPMENT AND OTHER HOUSEHOLD ARTICLES IN SPECIALISED STORES	G.47.59	Bulky
528396.839	633521.172	CAHILL'S PHARMACY	DISPENSING CHEMIST IN SPECIALISED STORES	G.47.73	Comparison
528434.52	633535.656	SEAN HENNESSEY ELECTRICAL	RETAIL SALE OF ELECTRICAL HOUSEHOLD APPLIANCES IN SPECIALISED STORES	G.47.54	Bulky
528255.103	633567.238	SHEAHAN'S STORES	RETAIL SALE IN NON-SPECIALIZED STORES WITH FOOD, BEVERAGES OR TOBACCO PREDOMINATING	G.47.11	Convenience

Following the desktop assessment procedure for all Study Areas and retail catchments for Limerick City and County and the Metropolitan Area overlapping into County Clare, an additional validation exercise was conducted to authenticate the desktop assessments with actual trading 'on the ground'.

This process entailed physical site visits to the delineated Study Areas and a representative portion of the additionally included retail sites outside of the Study Areas.

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The site visits assessed the retail activities as noted in the desktop assessment and recorded changes or updates to the listed retail activities where appropriate. The assessment also considered the recording of vacant premises in the study areas.

It must be noted that the consideration of vacancy during the validation process is subject to the assessment of premises closure due to COVID-19 public health and safety and retail trading guidelines imposed by the Government. During the validation process Ireland was in Level 5 Lockdown, which demanded the closure of all non-essential retail, dine-in restaurants, pubs and numerous retail services. Vacancies were recorded where it was 'clear and obvious' to the validator that no retail trade was being conducted in a premises. Where this determination was not clear, the premises was assessed in terms of its current view to validate the retail use accordingly.

Following the validation exercise and confirmation of retail floor areas assessed with Limerick City and County Council, the desktop and physical assessment floorspace figures were consolidated to provide an overall view of retail floorspace for Limerick City and Suburbs (with the inclusion of retail floorspace as assessed in Shannon, forming part of the Limerick-Shannon Metropolitan Area) and Newcastle West.

A.3 Main Study Areas and Additional Retail Inclusions

Limerick Catchment

Main Study Areas:

— Limerick City Centre;
— Jetland Shopping Centre;
— Crescent Shopping Centre;
— Parkway Shopping Centre;
— Parkway Retail Park;
— Roxboro Shopping Centre;
— Limerick One Shopping Centre;
— Childer's Retail Park;
— Eastpoint Business Park;
— City East Retail Park;
— Castletroy Shopping Centre.

Additional Inclusions:

— Thomondgate/Greystones;
— Moyross;
— Caherdavin;
— Northtown;
— Clondrinagh;
— Ennis Road;
— Corbally Centre;
— Newtown Shopping Centre;
— Grove Island Shopping Centre;
— Castletroy Park Hotel and Commercial Centre;
— Parkpoint, Dublin Road;

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— Castletroy Court;
— Castletroy District Centre;
— University Court Castletroy;
— Ballycummin Village Centre;
— Mulcair Road;
— Rosedale Centre;
— Courtfields, Church Road;
— Racefield, Father Russell Road;
— Crescent Court;
— St. Nessan's Road;
— Ballycummin Drive and R526;
— Punches Cross;
— Ashdown Centre.

A.4 Focal Point Analysis – Informing Allocations Considerations

For the purposes of analysing the distribution of shopping centres of various sizes throughout the City, a simple pedestrian catchment exercise was undertaken as illustrated in Figure 8-3. This diagram provides high level assistance in thinking about the relative location of centres and potential for new floorspace.

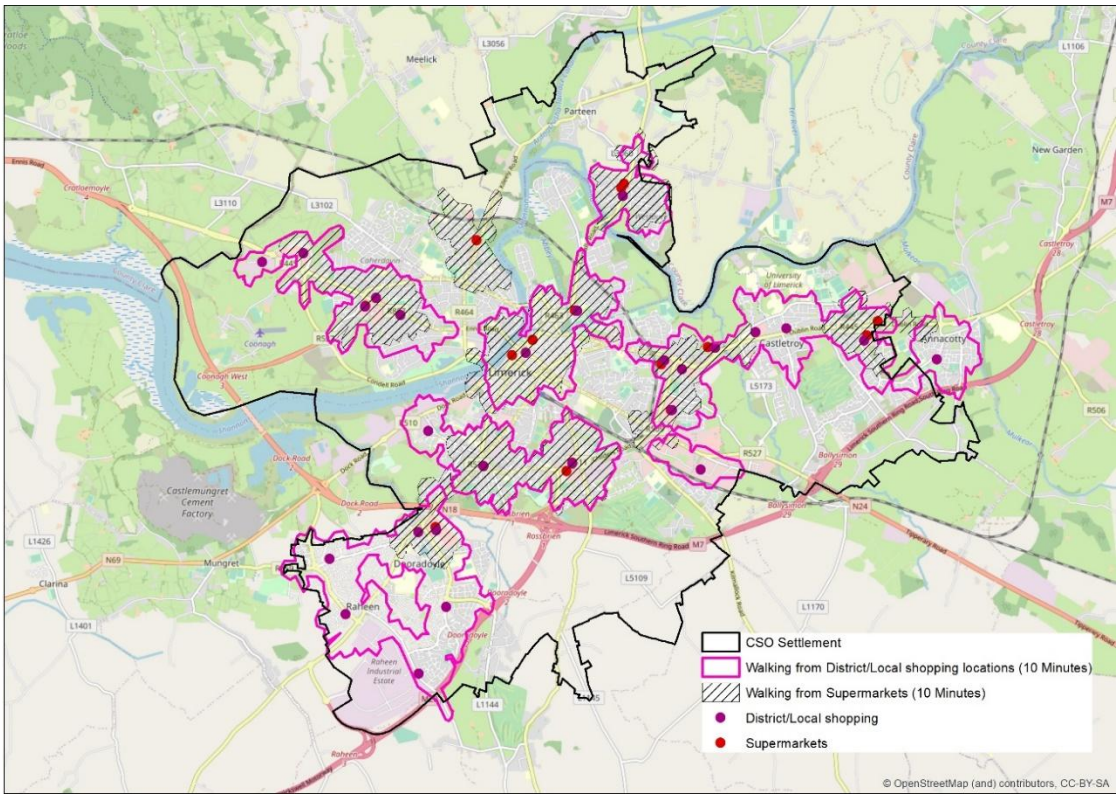


Figure 8-3: Walking Time Analysis from District Shopping Centres and Large Supermarkets

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A.5 Commercial Planning Pipeline Activity (February 2021)

Planning reg. ref.	Address	Status	Proposed floorspace (SQ.M)	Retail type
17284	City Mall, Crescent Shopping Centre, Dooradoyle, Limerick	Plans Granted	214	Comparison
18742	Unit 23, Crescent Shopping Centre, Dooradoyle	Commenced	355	Comparison
16241	Crescent Shopping Centre, Dooradoyle	Commenced	1,743	Comparison
18168	Ellen Street/Carr Street/Punch's Row, Limerick	Plans Granted	700	Generic
ABPREF304028	Opera Centre Site, Bank Place, Ellen Street, Patrick Street, Limerick	Plans Granted	2,418	Generic
16628	Parkway Shopping Centre, Dublin Road	Plans Granted	20	Comparison
16944	20 Thomas St,	Plans Granted	75	Comparison
161010	Corner of Anne Street and 42 Thomas Street	Plans Granted	190	Generic
15611	69 Catherine Street	Commenced	120	Comparison
16667	The City Centre Carpark, Thomas Street, Limerick	Plans Granted	633	Generic
141059	Maiden Street, Newcastle West, Co. Limerick	Plans Granted	94	comparison
207005	110 and 111 Maiden Street, Newcastle West, Co. Limerick	Plans Granted	231	comparison
17447	Dublin Road, Newcastle, Castletroy, Limerick	Plans Granted	431	convenience
1568	Old Dublin Road, Rhebogue, Castletroy	Commenced	359	convenience
191110		Plans Granted	515	convenience
19882	Unit no. 13, Jetland Shopping Centre, Ennis Road, Limerick	Plans Granted	517.5	comparison and convenience
141212	Unit 3 Corbally Centre, Corbally Road	Plans Granted	174	Generic
1749	Park Lodge, Dublin Road, Rhebogue, Limerick	Plans Granted	591	Generic
19345	Great Gas, Dublin Road	Plans Granted	204	convenience
15446	Stuffins Takeaway, Blackboy Road, Garryowen	Plans Granted	42.6	Generic
1738	Fairgreen Service Station, Spital-Land, Ballysimon Road, Limerick	Plans Granted	264	Generic
151048	Fairgreen Service Station, Spital-Land, Ballysimon Road	Plans Granted	18	Generic
161053	Unit No. 1 , Derynockane View, Ballycummin, Raheen	Plans Granted	64.4	comparison

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19376	Knockballynameath, Corbally	Plans Granted	2,123	convenience
20559	Sean's Shop, 20 New Road/19 John's Street, Johnsgate	Plans Granted	86	convenience
20395	Eir Carpark, Roches Street	Plans Granted[32]	2,434	convenience

[32] Application 20395 is currently under a 3rd party appeal.

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A.6 Survey Questionnaire

Section		Question #	Function	Questions
Section 1	*Respondent Information*	**1**	**Age**	**What age group are you in?**
				15-24 years old
				25-34 years old
				35-44 years old
				45-54 years old
				55-64 years old
				64-74 years old
				75+ years old
				No Response
		2	**Location**	**Where do you currently live (please state the (closest) town/ village name only)?**
				Town or Village name and County
				No Response
Section 2	*Influence of COVID-19*	**3**	**frequency**	**How has COVID-19 regulations changed your PHYSICAL shopping habits?**
				More shopping trips (smaller basket, less organised)
				Less shopping trips (larger basket, more organised)
				No change
				No response
		4	**frequency**	**How has COVID-19 regulations changed your ONLINE shopping habits?**
				More online shopping
				Less online shopping
				No change
				No response
		5	**Location**	**How has COVID-19 regulations influenced where you do your shopping?**
				I now shop closer to home, even though I have less offerings/services
				I shop close to home because I have all the offerings/services nearby
				I have to shop farther from home for the offerings/services I need regularly
				No change
				No response
		6	**Location**	**Where do you do your online shopping (due to COVID, Brexit, preference)**
				Shop more locally in County (conscious of origin and delivery time/cost)
				Shop more locally in Ireland (conscious of origin and delivery time/cost)
				Shop more internationally (don't mind origin or delivery time/cost)

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Section 3	*Transport*	**7**	**Transport**	**What mode of transport do you take when doing your main grocery shopping?**
			Main Grocery Shopping	
			Bus	
			Car	
			Cycling	
			Delivery	
			On Foot	
			Taxi	
			Other	
			No Response	
			Top-up Shopping	
			Bus	
			Car	
			Cycling	
			Delivery	
			On Foot	
			Taxi	
			Other	
			No Response	
			Clothing and Footwear	
			Bus	
			Car	
			Cycling	
			Delivery	
			On Foot	
			Taxi	
			Other	
			No Response	
			Bulky Household Goods	
			Bus	
			Car	
			Cycling	
			Delivery	
			On Foot	
			Taxi	
			Other	
			No Response	

Section 4	*Main Grocery Shopping*	**8**	**Location**	**Where do you do your main grocery shopping? (Name a Town Centre, District Centre, shopping centre, or other retail location).**
				Name of Town Centre, District Centre, shopping centre, or other retail location
				No Response

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		9	frequency	How often do you do your main food/grocery shopping?
				More than once per week
				Once per week
				3 times per month
				every 2 weeks
				Once per month
				No Response
		10	satisfaction	When shopping – is the experience/leisure aspect and services available important to you? (i.e. hairdressers, coffee shops, restaurants)
				Very important
				Important
				Neutral
				Not important
				No Response
		11	attraction	Why you do your main grocery shopping in this location?
				Customer Loyalty
				Accessibility (Convenient access, quality of roads, accessibility for pedestrians/cyclists, accessibility for disabled patrons)
				Convenience (En route or close to home or place of work/school/college)
				Choice/Variety
				Parking (Ease of parking, parking costs, proximity of parking to shops)
				Affordability (Value for money retail offerings)
				Quality
				Customer Service
				Support Local Businesses
				Availability (Range of products available)
				Brands
				Centralised location (Proximity to complementary services e.g. pharmacy, barber, butcher, etc.)
				Complimentary attractions nearby (e.g. cinema, kids play area, arcade, ten-pin bowling, ice rink, public open space, etc.)
				Atmosphere (Pleasant shopping environment)
				Low Traffic
				Delivery Options
				Other
				No Response
		12	expenditure	How much did you spend on your last grocery shopping trip for your main grocery purchases?
				0-25 euro
				25-50 euro
				50-100 euro
				100-200 euro
				200-300 euro
				300+ euro
				No Response

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		13	specific retailer	Which grocery store(s) do you normally visit for your main grocery purchases?
				Tesco
				Lidl
				Aldi
				Supervalu
				Iceland
				M&S
				Dunnes
				Spar
				Other
				No Response
		14	improvement	What element, in this location, should be improved to motivate you to shop there more often?
				Access (road access, traffic management, safer pedestrianised/cyclist access, improved public transport links)
				Parking (Improved access, cheaper/zero parking charges, more parking close to shops, more on street parking)
				Large retail offerings (E.g. Penneys, Dunnes, H&M, department stores)
				Larger grocery offerings (E.g. Tesco Superstore, Dunnes, Supervalu, etc)
				Choice/Variety (Improved range of stores, competitive pricing)
				Fresh produce (Improved fresh produce outlets (markets), more local produce offerings, fruit/veg/butchery/bakery)
				Trading hours (Increased trading hours)
				Location
				Public amenities (Improved access for disabled patrons, more/improved WC facilities, kids care/play area, recycling facilities, seating/rest areas, etc.)
				Specialist stores (bookstore, pharmacy, barber/salon, etc)
				Food and Beverage offerings (Restaurants, coffee shops)
				Food and Beverage offerings (Take-away, fast food, (delivery))
				Leisure facilities (Cinema, arcade, ten-pin bowling, ice rink, etc.)
				Other
				No Response
Section 5	*Top-up Shopping*	15	Location	Where do you do your top-up grocery shopping? (Name a Town Centre, District Centre, Shopping Centre, other retail location)
				Town, village name
				No Response
		16	frequency	How often do you do your top-up grocery shopping (Milk, bread etc)
				More than once per week
				Once per week
				3 times per month
				every 2 weeks
				Once per month
				No Response

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		17	expenditure	How much did you spend on your last top up shop?
				0-25 euro
				25-50 euro
				50-100 euro
				100-200 euro
				200-300 euro
				300+ euro
				No Response
Section 6	Clothing and Footwear	18	Location	Where do you go shopping for clothing and footwear (both for yourself and your household) (specify town, shopping centre or retail location that you would normally visit for these purchases)?
				Town, village name
				No Response
		19	frequency	How often do go shopping for clothing and footwear?
				As required
				More than once per week
				Once per week
				3 times per month
				every 2 weeks
				Once per month
				No Response
		20	attraction	Why do you visit that location for this type of shopping?
				Customer Loyalty
				Accessibility
				Convenience
				Choice/Variety
				Parking
				Affordability
				Quality
				Customer Service
				Support Local Businesses
				Availability
				Brands
				Centralised location
				Complimentary attractions
				Atmosphere
				Low Traffic
				Delivery Options
				Other
				No Response
		21	expenditure	How much did you spend on clothing/ footwear on your last visit?
				0-25 euro

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				25-50 euro
				50-100 euro
				100-200 euro
				200-300 euro
				300+ euro
				No Response
Section 7	*Bulky Household Goods*	**22**	**Location**	**Where do you go shopping for large bulky household goods? (Name a Town Centre, shopping centre or other retail location).**
				Town Centre, District Centre, shopping centre, or other retail location
				No Response
		23	**frequency**	**How often do you go shopping for bulky household goods?**
				As required
				More than once per week
				Once per week
				3 times per month
				every 2 weeks
				Once per month
				No Response
		24	**attraction**	**Why do you visit this location for your bulky household goods shopping?**
				Customer Loyalty
				Accessibility
				Convenience
				Choice/Variety
				Parking
				Affordability
				Quality
				Customer Service
				Support Local Businesses
				Availability
				Brands
				Centralised location
				Complimentary attractions
				Atmosphere
				Low Traffic
				Delivery Options
				Other
				No Response
		25	**expenditure**	**How much did you spend on your last shopping trip for larger bulky household goods?**
				0-100 euro
				100-200 euro
				200-300 euro
				300-400 euro

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				400-500 euro
				500-600 euro
				600-700 euro
				700-800 euro
				800-900 euro
				900-1000 euro
				1000-1500 euro
				1500-2000 euro
				2000-2500 euro
				2500-3000 euro
				3000-3500 euro
				3500-4000 euro
				4000-4500 euro
				4500-5000 euro
				5000+ euro
				No Response
Section 8	*Online Shopping*	**26**	**Participation**	**Did you (actively/regularly) shop online before COVID?**
				Yes
				No
				No Response
		27	**Frequency**	**How often would you purchase goods online?**
				As required
				More than once per week
				Once per week
				3 times per month
				every 2 weeks
				Once per month
				Once every 2 months
				Once every 3 months
				Once every 6 months
				Once a year
				No Response
		28	**Grocery**	**Do you shop online for main groceries?**
			a	Yes
				No
				No Response
			b	If yes, how much was your last purchase
				0-25 euro
				25-50 euro
				50-100 euro
				100-200 euro
				200-300 euro

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				300+ euro
				No Response
		29	**Comparison**	**Do you shop online for clothing/footwear?**
			a	Yes
				No
				No Response
			b	If yes, how much was your last purchase
				0-25 euro
				25-50 euro
				50-100 euro
				100-200 euro
				200-300 euro
				300+ euro
				No Response
		30	**Comparison Bulky**	**Do you shop online for bulky household goods?**
			a	Yes
				No
				No Response
			b	If yes, how much was your last purchase
				0-25 euro
				25-50 euro
				50-100 euro
				100-200 euro
				200-300 euro
				300-400 euro
				400-500 euro
				500-600 euro
				600-700 euro
				700-800 euro
				800-900 euro
				900-1000 euro
				1000-1500 euro
				1500-2000 euro
				2000-2500 euro
				2500-3000 euro
				3000-3500 euro
				3500-4000 euro
				4000-4500 euro
				4500-5000 euro
				5000+ euro
				No Response
		31	**Participation**	**For which type of goods will you now shop more for through online purchase, post-COVID?**
				Main grocery

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				Top-up grocery
				Clothing and footwear
				Bulky household goods
				Comparison goods
				None, will not increase online shopping in a particular category
				No Response
		32	**Attraction**	**Why would you choose to do online shopping (as opposed to visiting a shop location?)**
				Convenience
				Choice/Variety
				Affordability
				Quality
				Availability
				Delivery Options
				Health / Safety
				Other
				No Response
		33	**Support Local**	**Do you / would you shop from suppliers in Limerick County (if products are available locally)?**
				Yes, if available
				No, don't mind
				Other
				No Response
Section 9	***Other***	**34**	**Other discrete**	**When you go shopping, how much, if anything do you spend on other thing such as eating out or going to the hairdresser per visit?**
				0-25 euro
				25-50 euro
				50-100 euro
				100-200 euro
				200-300 euro
				300+ euro
				No Response

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A.7 Tourism Expenditure

Oversees Tourists ('000)	2013	2014	2015	2016	2017	2018	2019	2020	2021	2022	2023	2024	2025	2026	2027	2028
Basis	Historic					*Part Est.**	Historic	*Forecasted*								
Limerick	420	494	537	568	647	*624.5*	602	*132*	*144*	*361*	*445*	*512*	*572*	*601*	*631*	*663*

Domestic Tourists ('000)	2013	2014	2015	2016	2017	2018	2019	2020	2021	2022	2023	2024	2025	2026	2027	2028
Basis	Historic					*Part Est.**	Historic	*Forecasted*								
Limerick	241	253	257	188	284	*316.5*	349	*17*	*115*	*262*	*332*	*334*	*336*	*338*	*340*	*342*

Oversees Revenue (€m)	2013	2014	2015	2016	2017	2018	2019	2020	2021	2022	2023	2024	2025	2026	2027	2028
Basis	Historic					*Part Est.**	Historic	*Forecasted*								
Limerick	136	169	212	223	261	*257.5*	254	*46*	*56*	*152*	*188*	*218*	*241*	*253*	*266*	*279*

Domestic Revenue (€m)	2013	2014	2015	2016	2017	2018	2019	2020	2021	2022	2023	2024	2025	2026	2027	2028
Basis	Historic					*Part Est.**	Historic	*Forecasted*								
Limerick	37.4	39.2	32.1	25.2	46	*48.5*	51	*3*	*17*	*38*	*48*	*49*	*50*	*51*	*52*	*53*

Tourist Spend: Assumed Split by Catchment Area (€m)

Catchment Area	% of Tourism Relevant Revenue		2018	2019	2020	2021	2022	2023	2024	2025	2026	2027	2028
	% of Clare	% of Limerick											
Limerick Catchment	20%	80%	293.7	298.0	46.2	72.6	187.8	233.4	262.6	285.0	297.4	310.6	323.8
Newcastle West Catchment	-	20%	61.2	61.0	9.8	14.6	38.0	47.2	53.4	58.2	60.8	63.6	66.4
Total Assumed Revenue	**100%**	**100%**	**354.9**	**359.0**	**56.0**	**87.2**	**225.8**	**280.6**	**316.0**	**343.2**	**358.2**	**374.2**	**390.2**

Assumed Convenience Inflow from Tourism per Catchment Area

Tourist Spend: Assumed Split	2018	2019	2020	2021	2022	2023	2024	2025	2026	2027	2028
Limerick Catchment	35,860,770	36,385,800	5,641,020	8,864,460	22,930,380	28,498,140	32,063,460	34,798,500	36,312,540	37,924,260	39,535,980
Newcastle West Catchment	7,472,520	7,448,100	1,196,580	1,782,660	4,639,800	5,763,120	6,520,140	7,106,220	7,423,680	7,765,560	8,107,440
Total Assumed Revenue	43,333,290	43,833,900	6,837,600	10,647,120	27,570,180	34,261,260	38,583,600	41,904,720	43,736,220	45,689,820	47,643,420
Limerick County	37,362,600	37,240,500	5,982,900	8,913,300	23,199,000	28,815,600	32,600,700	35,531,100	37,118,400	38,827,800	40,537,200

Assumed Comparison Non-Bulky Inflow from Tourism per Catchment Area

Tourist Spend: Assumed Split	2018	2019	2020	2021	2022	2023	2024	2025	2026	2027	2028
Limerick Catchment	38,181,000	38,740,000	6,006,000	9,438,000	24,414,000	30,342,000	34,138,000	37,050,000	38,662,000	40,378,000	42,094,000
Newcastle West Catchment	7,956,000	7,930,000	1,274,000	1,898,000	4,940,000	6,136,000	6,942,000	7,566,000	7,904,000	8,268,000	8,632,000
Total Assumed Revenue	46,137,000	46,670,000	7,280,000	11,336,000	29,354,000	36,478,000	41,080,000	44,616,000	46,566,000	48,646,000	50,726,000
Limerick County	39,780,000	39,650,000	6,370,000	9,490,000	24,700,000	30,680,000	34,710,000	37,830,000	39,520,000	41,340,000	43,160,000

A.8 Notes

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Contact us

Richard Hamilton

Director – KPMG Future Analytics

T + 35317004019

E richard.hamilton@kpmg.ie

Jamie McGrath

Director – KPMG Future Analytics

T +35317004031

E jamie.mcgrath@kpmg.ie

Daniel Rood

Senior Consultant – KPMG Future Analytics

T +35314107845

E daniel.rood@kpmg.ie

Gracjan Fil

Senior Consultant – KPMG Future Analytics

T +35314102567

E gracjan.fil@kpmg.ie

Shane McCormack

Analyst – KPMG Future Analytics

T +35314107798

E shane.g.mccormack@kpmg.ie

www.kpmg.com

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