LOUTH COUNTY DEVELOPMENT PLAN 2021-2027

APPENDIX 4

Louth Retail Strategy

NOTE: A Retail Strategy Quantitative Analysis for Dundalk was carried out as part of the preparation of the Dundalk Local Area Plan (See Appendix 3 of the Dundalk LAP) and is included as an appendix to the Louth Retail Strategy.

LOUTH COUNTY DEVELOPMENT PLAN
2021-2027

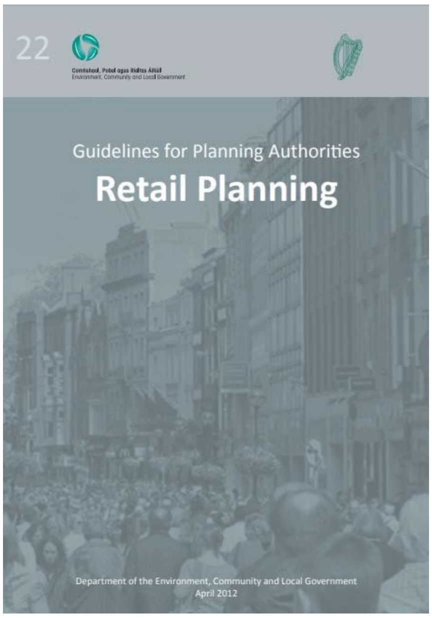
LOUTH RETAIL STRATEGY

2021-2027

Table of Contents

1.1 INTRODUCTION

This Retail Strategy has been prepared by Louth County Council in accordance with provisions set out in the *'Retail Planning Guidelines for Planning Authorities'* published by Department of the Environment, Heritage and Local Government (DoECLG) in 2012.



It is envisaged that the new Retail Strategy will inform the policy objectives of the Louth County Development Plan 2021-2027, in respect of retail development and ensure that such policy objectives are based on the most up-to-date information. The overarching aim of the Strategy is to ensure that future retail development in the County is accommodated in a manner that is efficient, equitable and sustainable. The primary purpose of the Retail Strategy is to implement the objectives of the Retail Planning Guidelines 2012. The Strategy provides important information on the quantum, scale and types of retail development required over the period to 2027, with a further outlook to 2030.

It should be noted that the Retail Strategy 2021-2027 has been prepared over the period of late 2019 and early 2020, prior to the onset of Covid-19 in Ireland. It is widely acknowledged that the impact of Covid-19 on the retail sector in Ireland will be far reaching. However, the long-term impact will not be measurable for some period of time and therefore it is considered premature to attempt to capture such impacts within this Strategy.

1.1.1 Methodology

A key focus of this Retail Strategy is to provide an up-to-date picture of the current retail landscape in County Louth and to implement the objectives of the Retail Planning Guidelines 2012 with regards to future retail provision within the County. The applied methodology for this strategy considers the various trends within the sector and the ever changing nature of retail in Ireland.

The principal aims of the strategy are as follows:

- Establish the context in which the retail sector in County Louth operates;
- Define the Retail Hierarchy in the County and related retail core boundaries for Drogheda, Dundalk and Ardee;
- Undertake a health check appraisal of the retail offering in Drogheda, Dundalk and Ardee;
- Identify the broad requirement for additional retail floor space development in the County over the Plan period, to support the established Settlement Hierarchy; and
- Provide guidance on policy recommendations and criteria for the future assessment of retail development proposals over the Development Plan Period 2021-2027.

1.2 NATIONAL, REGIONAL AND LOCAL POLICY CONTEXT

There are a number of national, regional and local policy documents which must be taken into consideration when formulating any retail strategy.

1.2.1 National Policy Context

The following section outlines the key national policy relevant to retail planning in Ireland. The relevance of each of these documents to County Louth is addressed.

1.2.1.1 National Planning Framework

The National Planning Framework (NPF) is the Government's high-level strategic plan for shaping the future growth and development of Ireland up to 2040. It contains an overall vision for the country and a number of shared goals referred to as National Strategic Outcomes (NSOs) which seek to implement this vision and are relevant to all communities throughout Ireland.

National Policy Objective 7 in the NPF sets out the approach to urban development nationwide. This includes:

- Encouraging population growth in strong employment and service centres of all sizes.
- Reversing the stagnation or decline of smaller urban centres, by identifying and establishing new roles and functions and enhancement of local infrastructure and amenities.
- Addressing the legacy of rapid unplanned growth, by facilitating amenities and services catch-up, jobs and/or improved sustainable transport links to cities, together with a slower rate of population growth in recently expanded commuter settlements.
- Supporting a continuation of balanced population and employment growth in self-contained settlements.

The NPF designated both Drogheda and Dundalk as 'Regional Growth Centres'. One of its key future planning and development and place-making policy priorities for the Eastern and Midland Region includes:

"A focused approach to compact, sequential and sustainable development of the larger urban areas along the Dublin – Belfast economic and transport corridor, along which there are settlements with significant populations such as Dundalk and Drogheda".

1.2.1.2 National Development Plan 2018-2027

The National Development Plan 2018-2027 (NDP) sets out the investment priorities that will underpin the implementation of the National Planning Framework, through a total outlay of approximately €116 billion.

Objective No. 5 of the NDP pertains to "A strong economy, supported by enterprise, innovation and skills", and sets a priority within each of the three regions for the generation of 660,000 new jobs. One of the investment Actions included in the NDP is "Investing in Regional Growth potential".

1.2.1.3 Retail Planning Guidelines and Retail Design Manual 2012

The Retail Planning: Guidelines 2012 require local authorities to prepare retail strategies and policies for their areas which are to be incorporated into county development plans. The five key policy objectives contained within the Retail Planning Guidelines 2012 are to:

- Ensure retail development is plan led and follows the Settlement Hierarchy,
- Promote town centre vitality through a sequential approach to development,
- Secure competitiveness in the retail sector by actively enabling good quality development proposals to come forward in suitable locations,
- Facilitate a shift towards increased access to retailing by public transport, cycling and walking in accordance with the Smarter Travel Strategy,
- Deliver quality urban design (Retail Design Manual 2012).

The Guidelines also provide specific guidance for the content and role of development plans. It is stated, inter alia, that:

- Development Plans must set out clear evidence based policies and objectives in relation to retailing in a discrete section of the Plan titled Retail Development,
- Joint or multi-authority retail strategies where required, will guide the preparation of retail policies and objectives in the relevant Development Plans,
- The need for any additional retail warehousing should be carefully assessed in view of the significant levels of recent provision and potential impacts on vitality and viability of city and town centres.

At a minimum, City and County Development Plans must:

- State the elements of their Settlement Hierarchy in line with the relevant regional planning guidelines and their core strategy,
- Outline the level and form of retailing activity appropriate to the various components of the Settlement Hierarchy in the core strategy,
- Define, by way of a map, the boundaries of the core shopping areas of city and town centres and also location of any district centres,
- Include a broad assessment of the requirement for additional retail floorspace only for those plans in the areas covered by a joint or multi-authority retail strategy,
- Set out strategic guidance on the location and scale of retail development to support the Settlement Hierarchy, including where appropriate identifying opportunity sites which are suitable and available and which match the future retailing needs of the area,
- Identify sites which can accommodate the needs of modern retail formats in a way that maintains the essential character of the shopping area,
- Include objectives to support action initiatives in city and town centres; such as:
- Mobility management measures - urban environment and vibrant street life and public realm interventions,
- Identify relevant development management criteria for the assessment of retail developments in accordance with these guidelines.

The Retail Design Manual 2012 sets out key principles of urban design which may form the framework for policies to promote quality design in development plans and local area plans. These include but are not limited to design, context & character, access & connectivity and density & mixed use.

1.2.2 Regional Policy Context

The following section sets out the regional policies that guide retail planning in Ireland.

1.2.2.1 Regional Spatial and Economic Strategy (RSES):

The RSES identifies the retail sector as a significant employer and economic contributor in the Eastern and Midlands Region and acknowledges the important role retail plays in place making and creating attractive liveable environments. The role of retail in urban regeneration is also highlighted.

The RSES states that the Eastern and Midlands Regional Authority (EMRA) will 'support and drive the preparation of a new retail strategy for the Region under the requirements of the Retail Planning Guidelines for Planning Authorities 2012, or any subsequent update, to update this hierarchy and apply floorspace requirements for the Region'.

The Strategy also contains specific Regional Policy Objectives (RPO) concerning retail developments:

RPO 6.10: EMRA *will support the preparation of a Retail Strategy / Strategies for the Region in accordance with the Retail Planning Guidelines for Planning Authorities 2012, or any subsequent update, to update the Retail Hierarchy and apply floorspace requirements for the Region.*

RPO 6.11: *Future provisions of significant retail development within the Region shall be consistent with the Retail Planning Guidelines for Planning Authorities 2012, or any subsequent update, and the Retail Hierarchy for the Region, expressed in the RSES, until such time as this hierarchy is updated.*

At the time of writing there was no indication from EMRA regarding any timeframe or proposal to update the Retail Hierarchy for the Region in accordance with RPO 6.10. Table 6.1 of the RSES sets out the Retail Hierarchy for the Region, including County Louth which is set out below:

- *Level 2* Major Town Centres and County Towns – Drogheda, Dundalk.
- *Level 3* Town and/or District Centres & Sub-county Town Centres (key service centres) – Ardee, Drogheda District Centre: Matthews Lane, Dundalk District Centres: Dublin Road & Ard Easmuinn.
- *Level 4* Neighbourhood centres, local centres, small towns and villages.
- *Level 5* Corner shops/small villages.

1.2.3 Local Policy Context

The following section sets out the local policy documents which influence retail planning in County Louth.

1.2.3.1 County Louth Local Economic & Community Plan

Under the Local Government Act 2014, each Local Authority is obliged to develop a Local Economic & Community Plan. The County Louth Local Economic & Community Plan 2016-2022 (LECP) sets out a number of targeted complementary measurable actions, with clearly defined timeframes and indicators, which will be delivered in partnership with other economic, statutory and community development stakeholders.

The basis for the LECP's economic goals has been drawn from the Louth Economic Forum's 10 point plan. The economic goals set out by the Louth Economic Forum, together with a suite of objectives and measurable actions will be the primary tools by which economic growth will be created and measured in Louth over the lifetime of the LECP.

The community element of the Louth LECP will be the primary tool to advance the goals and horizontal themes of the Commission for the Economic Development of Rural Areas (CEDRA) and the Social Inclusion and Community Activation Programme (SICAP), which reflect both rural and urban areas and the priority strategic objectives that the Louth Local Community Development Committee serves.

The overall vision of the LECP is that Louth will be a prosperous, proud, safe and inclusive county where people want to live, work, visit and invest and where there is equal opportunity for all.

The LECP sets out the following integrated priorities;

- Prosperity & Job Creation,
- Access to Education Skills & Development,
- Empowered, Inclusive, Communities,
- Health & Wellbeing,
- Entrepreneurship, Innovation & Enterprise,
- A Valued, Sustainable & Connected Environment.

The LECP sets out a series of economic goals and objectives for the County. These include a number of retail specific objectives' including an objective to 'Promote the growth of the Retail Sector'. The actions set out to deliver this objective are;

- Creating incentives for the sequential development of existing and new retail and retail services businesses in accordance with the Louth Retail Hierarchy.
- Louth will provide support and assistance to pop-up shops and markets in Louth's principal towns enabling artisan food producers, artists and craft makers to showcase and sell their products.

1.2.3.2 Louth Retail Strategy 2014

The Louth Retail Strategy 2014 (Appendix 12 of the Louth County Development Plan 2015-2021) set out the indicative potential for additional convenience, comparison and bulky household goods floor space in the towns of Drogheda, Dundalk and Ardee, over the lifetime of the Louth County Development Plan 2015-2021 and for the three years beyond to 2024. The potential floor space capacity for each town was set is in accordance with the settlement and Retail Hierarchy of the County and was proportioned in accordance with population targets for the aforementioned settlements for 2021. The indicative additional floorspace requirements contained within the Louth Retail Strategy 2014 are detailed in Table 1.0 below:

Table 1.0 – County Louth Additional Floorspace Capacity (Louth Retail Strategy 2014)

Year	Convenience (sq.m)	Comparison (sq.m)	Bulky Comparison (sq.m)
2021	5,322	16,774	-2,970
2024	8,986	31,984	4,912

The Louth Retail Strategy 2014 identified the Core Shopping Areas within Drogheda, Dundalk and Ardee which are primarily devoted to shopping. This Retail Strategy replaces the Louth Retail Strategy 2014 and ensures that future retail development in the County is accommodated in a manner that is efficient, equitable and sustainable. The Strategy provides an update on the quantum, scale and types of retail development required over the period to 2030.

1.3 Economic Context and Retail Trends

The following section provides an overview of the national economy, the retail economy and the growing influence of online shopping.

1.3.1 National Economy

The Irish economy experienced significant economic growth in 2019, registering GDP growth of 5.5 per cent. The large increase in taxation receipts and the continued strong performance of the Irish labour market means the underlying economy is performing well.

In its Quarterly Economic Commentary - Winter 2019, the Economic and Social Research Institute (ESRI) notes that there has been a continued strong underlying performance within the Irish economy which is particularly apparent when compared to European and UK growth rates. It is also noted that Ireland has achieved persistently strong growth rates within the domestic economy over the past six years. Aggregate house prices and rent levels have increased to a significant degree since the international financial downturn of 2007 and 2008. However, there are indications of varying house prices and rental levels across Irish counties during the period of the economic recovery. While the housing market as a whole has experienced a significant increase in prices and rents over the past ten years, it is evident that certain areas have grown faster than others.

In terms of the labour market, the unemployment rate has fallen below 5 per cent for the first time since 2007. Employment has risen by 2.4 per cent in the year to Q3 2019 with 2,326,900 people at work and average weekly earnings increased by 4 per cent annually in Q3 2019.

The Irish economy has been significantly boosted by increased Foreign Direct Investment (FDI) and multinational companies in recent years. Figures from the IDA Ireland indicate their client companies have a hugely positive effect on the Irish economy with over eight jobs being created for every 10 jobs in an FDI company. Further, approximately two thirds of the Governments tax take can be attributed to IDA supported FDI sector in Ireland.

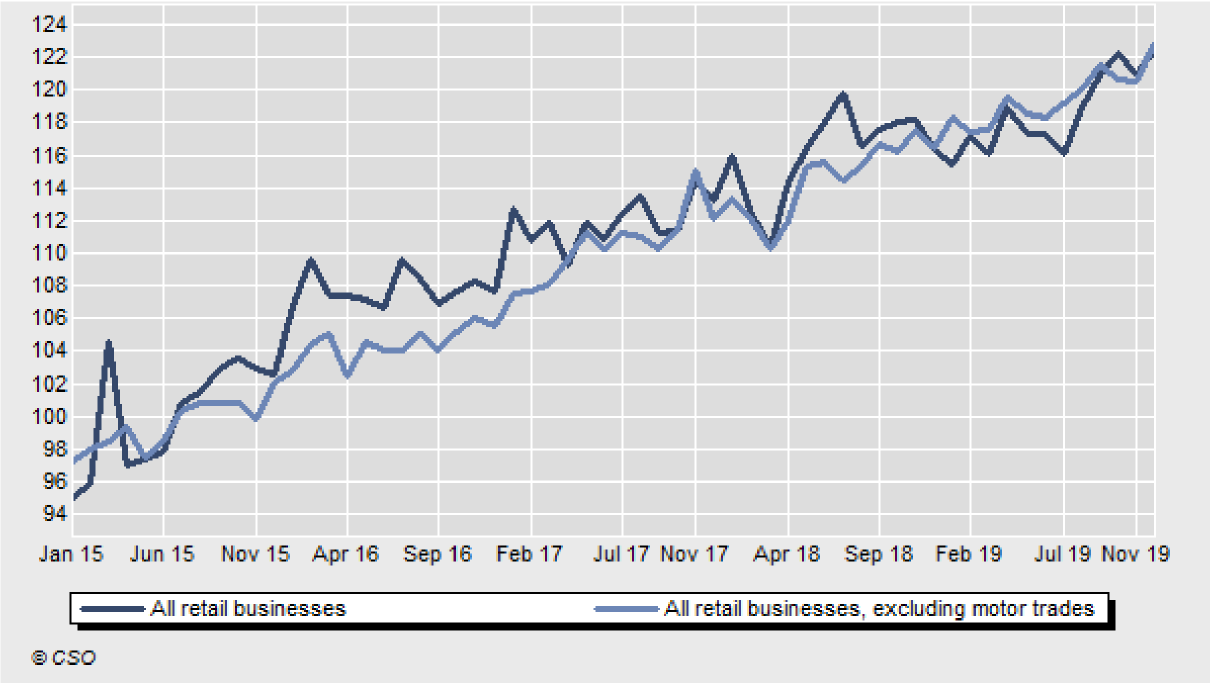
However, despite the continued economic growth evident in Ireland at the end of 2019, there remains uncertainty surrounding the timing and process in relation to Britain’s exit from the European Union. As a result, the ESRI forecasts that economic growth will slow to 3.3 per cent in 2020. Growth forecasts are expected to shrink further once the economic impact of the Covid-19 pandemic becomes known.

1.3.2 Retail Economy

In line with overall economic performance over the last two decades, Ireland’s retail sector has witnessed significant fluctuations. The retail sector experienced a significant decline in 2008 where there was a sharp increase in retail closures and a decline in employment within the sector – employment declined by approximately 40,000 from a peak of 315,000 in 2008.

The sector has seen a gradual recovery and retail sales in Ireland have witnessed a steady increase in since 2015. The sector is now the largest private sector employer in the country, employing over 13% of the workforce. There are 40,000 retail businesses across the whole country; 90% of which are Irish-owned. The CSO's Retail Sales Index has shown a gradual increase in retail sales from 2015 through to the end of 2019. This trend is evident within Figure 1.0 below.

Figure 1.0 – Retail Sales Index (Volume) 2015-2019



Source: CSO, Statbank

However, despite a relatively strong retail market, Ireland's consumer remains cautious and value-conscious, particularly given Britain's departure from the European Union and the global economic climate remaining uncertain. While high employment levels are boosting economic activity, the growth of disposable income remains under pressure. Consumer sentiment has seen many shifts in recent years, most notably towards the end of 2019.

The KBC Bank Ireland/ESRI consumer sentiment index rose to 77.1 in November 2019 from a six-year low of 69.5 recorded in October 2019. The sharp decline seen October 2019 was linked to a possible hard exit of Britain from the European Union. While consumer sentiment did rebound towards the end of 2019, this sharp fluctuation demonstrates the clear link between the geo-political landscape and consumer sentiment and the associated volatility this brings to the retail sector.

The Retail Ireland, Quarterly Retail Monitor (Q1, 2020) notes that top line retail sales figures are robust and consumer spending habits have remained consistent across many categories of retail, with both sales values and volumes posting increase in all but one retail category. The aforementioned report indicates that a recent trend has emerged whereby the volume of sales has far outpaced the value of sales, with many retailers continuing to engage in the deep discounting of goods.

The report suggests that Irish consumers and retailers alike have now become accustomed to price promotion as a sales driver and generator. The report describes the current retail sector as ultra-competitive.

Specifically in relation to the convenience sector, the Quarterly Retail Monitor notes that the performance of supermarkets and convenience stores has continued strongly in 2019. However, the report comments that within the supermarket sector hard discounters are outperforming traditional supermarkets.

The competition in recent years between the three largest supermarket operators (Dunnes Stores, Supervalu and Tesco) has been dynamic. Kantar is the global expert in shoppers' behaviour and reports monthly on grocery market share in Ireland. The market share data is collated utilising Kantar's panel of 5,000 households throughout Ireland.

In December 2019 Kantar reported that the three largest supermarket operators accounted for over 67% of Ireland's total grocery market share. The report estimated that Dunnes Stores held 23.6%, Tesco 22% and Supervalu 21.8% of the market share. Aldi and Lidl accounted for 11.3% and 10.9% respectively. The intense and dynamic competition between Dunnes Stores, Tesco and Supervalu has been evident within Kantar's market share numbers for the last number of years, with minimal percentage points reported between the three operators.

Notwithstanding the competition amongst the three main supermarket operators, it should be noted that both Aldi and Lidl have had a marked impact on the grocery sector since their arrival to the Irish market almost twenty years ago. Both companies have pursued extensive expansion strategies across Ireland and now represent a mainstay of the grocery market in most urban centres. The combined market share for Aldi and Lidl has grown from 13.1% in 2013 to 22.2% at the end of 2019.

The Retail Ireland, Quarterly Retail Monitor (Q1, 2020) notes that the CSO retail sales figures point to varying performances across different categories within the retail sector. While the value of total retail sales has increased by 2.6% between 2018 and 2019, department stores have seen a 5.1% decline in sales.

This reflects the recent struggles which have been experienced by mid-market department stores such as House of Fraser and Debenhams. Within the broader comparison sector the value of sales for fashion, footwear and textiles stores has increased by 2% between 2018 and 2019. Similarly, bulky comparison categories such as furniture, lighting and homeware stores have seen the value of sales increase by 6.5% whilst DIY and hardware stores have increased sales by 5.6%.

1.3.2.1 Online Shopping

Online shopping continues to increase exponentially in Ireland. The Global Cross Border Commerce Report (2018), conducted by Ipsos on behalf of PayPal revealed that the total online spend by Irish consumers is currently growing at a rate of around 20% year-on-year in Ireland. The study forecasted that Irish consumers will spend up to €10.1 billion online by 2020.

The study found that Irish online consumers were the biggest international shoppers worldwide, with a larger proportion (84%) shopping overseas than any of the other 30 countries surveyed. Irish online shoppers spent €2.7 billion overseas in the past 12 months.

The Information and Communications Technology (ICT) Household Survey is carried out by the CSO on an annual basis and collects data on households' access to, and individuals' use of, the internet.

The 2019 survey found that clothes or sports goods were the most popular online purchase in 2019, purchased by over half (51%) of internet users, an increase of 9% from the 2016 survey.

The concept of 'Click and Collect' shopping has also seen an increase in Ireland. Click and Collect is the process of buying a product online but instead of it being shipped to the consumer's home address, they instead collect it from their nearest retailer or designated pick-up point. This type of offering can relate to both grocery and non-food (comparison) categories. The 2019 PwC Irish Retail and Consumer Report found that 17% of respondents surveyed stated that they used Click and Collect services in 2018 and 44% of 23-26 year olds expected to use a Click and Collect service in 2019.

The survey also found that although shopping in-store remains important for Irish customers 44% of respondents frequently used a PC, tablet or smart phone to shop online, an increase of 13% on the 2018 survey. At a local level, surveys carried out as part of the Dundalk Collaborative Town Centre health Check 2019 found that almost 30% of respondents shop online at least once per month with 59% stating that clothing and accessories are the type of goods mainly bought online.

At the time of writing, only two of the major grocery retailers in Ireland operate a nationwide internet retailing channel: Supervalu and Tesco. Both players have seen a rapid expansion in online delivery over the past number of years, with Tesco Ireland reporting a 15% growth in online orders during 2019. Lidl have partnered with a third party online grocery delivery service to provide online grocery shopping within Dublin and limited areas within the greater Dublin area.

Online shopping is one of the most significant growth areas in the retail market and will continue in the years ahead. While many of the major retailers have capitalised on this growth area, many traditional independent retailers have suffered significant loss of sales. The continued growth of online retail and increasing expectations means that town centre retailers need to become experience centres, not just places to purchase.

The in-store experience remains the most immediate connection between the consumer and the product. This represents an opportunity for town centres to provide something that is not possible online. Town centres need to become a destination where experience and social interaction become as important as retailing in order to survive and prosper versus online shopping.

1.4 HEALTH CHECK ANALYSIS

The Retail Planning Guidelines 2012 earmark vitality and viability as being intrinsic in maintaining and enhancing town centres. As defined in the Retail Planning Guidelines 2012 "Vitality is a measure of how active and buoyant a centre is, whilst viability refers to the commercial well-being of a town".

Each of the primary settlements within Louth has been assigned a position within the Settlement Hierarchy and the Retail Hierarchy of the County. This position reflects both the settlements size and role within the County, and outlines the functions which are assigned to it. The purpose of this section is to carry out a health check analysis for the towns of Drogheda, Dundalk and Ardee.

The Retail Planning Guidelines 2012 provide general direction as to the fundamental factors contributing to a 'healthy' town centre. These include:

Attractions - These underpin a town and comprise the range and diversity of shopping and other activities which draw customers and visitors.

Accessibility - Successful centres need to be both accessible to the surrounding catchment via a good road network and public transport facilities, and to encompass good local linkages between car parks, public transport stops and the various attractions within the centre.

Amenity - A healthy town centre should be a pleasant place to be in. It should be attractive in terms of environmental quality and urban design, should be safe and have a distinctive identity and image.

Action **-** To function effectively as a viable commercial centre, things need to happen. Development and improvement projects should be implemented efficiently; there should be regular and effective cleaning and maintenance and there should be co-ordinated town centre management initiatives to promote the continued improvement of the centre.

As prescribed by the Retail Planning Guidelines 2012, the health checks use the following indicators of viability and vitality in addition to recommendations for action, with the aim to improve or maintain the health of each town.

- Attractions;
- Accessibility;
- Environmental Quality and Amenity;
- Diversity of Uses;
- Multiple Representation;
- Levels of Vacancy.

Retailing and the provision of retail services is one of the primary functions of any urban settlement. This health check analysis has been undertaken to evaluate the retail functions of the three main urban settlements of County Louth. A health check assessment essentially analyses the strengths and weaknesses of town centres. The information collated included a land use survey and local knowledge. The health check analysis for Dundalk, Drogheda and Ardee was utilised to define the core shopping area for each settlement and identify opportunity sites for retail development.

It should be noted that additional retail opportunity sites may come forward over the lifetime of this retail strategy and these shall be assessed on their own merits and in accordance with the proper planning and development of the area.

1.4.1 Drogheda

Census 2016 results show that Drogheda has maintained its position as the largest town in Ireland. The town has a population of 40,956 (Census 2016). It should be noted that 34,199 of the total population live within the Louth county boundary, with the remaining 6,757 resident within County Meath. The total population of Drogheda grew by 2,378 (6.2%) between 2011 and 2016. The town has been designated as a Regional Growth Centre within the National Planning Framework.

1.4.1.1 Attractions

Drogheda serves a wide catchment area stretching northwards towards Dunleer, west towards Slane and south towards the expanding populations of Laytown, Bettystown and Duleek. As such the town incorporates a wide range of retail and service functions which would generally be associated with a large urban centre.

West Street provides the focal point for the town centre trading area. It acts as the primary shopping street within the town centre with the subsequent secondary retail streets being St. Laurence Street, Peter Street, Shop Street and Dyer Street. These streets accommodate a mix of independent and multinational retailers.

The multinational traders include Penneys, Dunnes Stores and Tesco which trade alongside long established independent retailers such as McKenna Man, Wogans and Victor Dwyer Shoes. The traditional town centre has been supplemented by Scotch Hall Shopping Centre, Drogheda Town (Shopping) Centre and Laurence Shopping Centre.

Drogheda's retail trade is boosted by tourism footfall, particularly during the peak summer season. Drogheda is a designated 'Destination Town' under the recently announced Fáilte Ireland scheme. It is also a Heritage Town offering a wide range of cultural and historical attractions including Millmount Museum, the Highlanes Gallery, St. Peters Church, St. Laurence's Gate in addition to its geographical location within the Boyne Valley.

In terms of recreation and amenity Drogheda enjoys a wide range of facilities. Running from St. Dominic's Park on the south bank of the River Boyne near the Bridge of Peace in Drogheda, the Boyne Greenway takes you along the river close to the Mary McAleese Cable Bridge and then along the Boyne Canal to the Battle of the Boyne Visitor Centre at Oldbridge. The walking and cycling facility utilises sections of boardwalk to create a riverside resource connecting Drogheda's town centre to the Oldbridge Estate, via the existing ramparts. Along the boardwalk are a number of heritage signs with information about Irish Mythology relevant to the Boyne Valley. There are also a number of walks through parkland at the Battle of the Boyne site, Oldbridge Estate.

Our Lady of Lourdes regional hospital provides acute medical and surgical services as well as maternity services to the catchment area of Louth, Meath and the surrounding hinterland including parts of north county Dublin. It is a significant employer and centre of excellence in health in the region with links to the Royal College of Surgeons.

The health sector forms part of a varied employment base which is enhanced by the presence of multinational companies such as Coca-Cola, International Fund Services and Becton Dickinson.

Drogheda also has a strong cultural community. The town is home to Droichead Arts Centre, a bi-location arts centre, hosting performances, events and exhibitions. Highlanes Gallery is also located in the former Drogheda Franciscan Church. Drogheda is the host town for numerous annual festivals including Drogheda Arts Festival, running annually in May since 2004, Drogheda Traditional Music Weekend, which is over 25 years old and Leanbh Children's Festival, running since 2017.

The town most recently hosted the Fleadh Cheoil in 2018 and 2019, with the 2019 event resulting in over 700,000 visitors to the town.

There are many good quality open spaces throughout Drogheda including St. Dominick's Park and Lourdes Athletics Stadium at Boyle O'Reilly Terrace. Other attractions such as United Park (home venue for Drogheda United soccer) and O'Raghallaighs Gaelic Football Club (home to Louth GAA) provide amenities which draw patrons from the wider area.

1.4.1.2 Accessibility

Drogheda is located along the Dublin-Belfast Economic Corridor and is extremely well connected by road, rail and sea.

Drogheda is located along the M1 which provides ease of access to Dublin and Belfast. Drive times to Dublin (and by extension Dublin Port and Dublin Airport) are between 25 and 35 minutes. Drive times to Belfast are approximately 80 minutes.

Drogheda is also well connected to the N2 via Slane on the N51 and via Duleek along the R150/R152. At a local level, Drogheda's spatial distribution along both sides of the River Boyne and the limited number of vehicular connections between the north and south side of the town has the undesirable effect of drawing traffic into the town centre. This has resulted in significant traffic congestion within the town centre as people seek to move across the town. The development of the Port Access Northern Cross Route (PANCR) has been a long term objective of the Council. The construction of this road will facilitate the removal of a significant proportion of existing HGV traffic from the town centre and will provide an opportunity to improve the public realm and streetscape within the town centre and along the quays.

Public transport in Drogheda has improved measurably in recent years. Under licenses awarded by the National Transport Authority, private bus operators now provide high frequency connections to Dundalk and Dublin.

This includes connections to the Irish Financial Service Centre and third level institutions in Dundalk and Dublin.

Drogheda also benefits from its location along the Dublin-Belfast railway line. The intercity 'Enterprise' service between Dublin and Belfast provides 35 minute journey times between Drogheda and Dublin Connolly and 95 minute journey times to Belfast. High frequency peak time commuter services also provide for 1 hour journey times between Drogheda and Dublin Connolly. Car parking at Drogheda train station is operated at maximum capacity during the working week. Bus Éireann have also recently introduced significant enhancements to services between Drogheda and Laytown, with routes D1 and D2 providing a combined 15 minute frequency throughout the day.

There are a number of public and private car parks operating within the town centre. This includes four multi-storey car parks, three of which are associated with Drogheda Town Centre, Laurence Shopping Centre and Scotch Hall Shopping Centres. Parking for the first two hours at Drogheda Town Centre is provided at €1.30 an hour, Scotch Hall at €1.50 an hour and Laurence Street Shopping Centre at €1.20 an hour.

1.4.1.3 Environmental Quality and Amenity

Drogheda is one of Ireland's most historic urban settlements and together with its location along the River Boyne lends itself to good environmental quality and amenity. The modern town of Drogheda comprises a historic town core within a broad suburban hinterland.

The town also boasts many historic landmark buildings and structures such as St. Laurence's Gate, St. Peters Neo-Gothic Cathedral and Millmount Fort. Drogheda town centre lies within the Heritage Quarter characterised by historical areas and buildings and a high proportion of Architectural Conservation Areas (ACA's).

However, peripheral parts of the town centre in common with many other Irish towns have lost their purpose and are underperforming. This is clearly evident in terms of dereliction, vacancy and lack of vitality in Narrow West Street and the surrounding Westgate area. In response Louth County Council has prepared an urban regeneration vision for Westgate.

The Westgate Vision is a guide for townscape recovery within a 10 year plus delivery timeframe. The guide to townscape recovery is targeted at property owners, investors, developers and their agents. The Westgate Vision Area comprises: The Barlow House Area, between George's Square and Scholes Lane including Narrow West Street and extending north to Fair Street; the Old Abbey Lane Area, between Narrow West Street and the River Boyne extending east to Dominic Street; and west to the Bridge of Peace and the Donaghy's Mills Area west of the Bridge of Peace and south of Trinity Street. Delivering the Vision comprises a detailed implementation breakdown in 3 stages over a 10 year plus timeframe.

Through the Part 8 process, Louth County Council has also brought forward a visitor orientation and signage project along a number of streets in Drogheda Town centre. The project will include new information and interpretation panels for Tourists on streets along both the east-west and north-south axes, with interpretation features and lighting at ground level in key locations relating to Drogheda's historical Architecture and key historic figures. The aim of the project is to facilitate better way finding and sense of place at key arrival points.

It is evident that a significant pedestrian thoroughfare has developed between the West Street / Shop Street area, the North Quays and Scotch Hall. However, the North Quays area is heavily trafficked and pedestrian footpaths are narrow. Improvements within this area coupled with the longer term delivery of the Port Access Northern Cross Route would significantly enhance the environmental quality within the town centre.

1.4.1.4 Diversity of Uses and Multiple Representation

Drogheda is particularly well catered for in terms of retailer representation and a diverse mix of uses. The land use survey of the principal shopping street in the town (West Street) indicates a good mix of uses. Retail is the dominant use occupying 45% of all units along West Street.

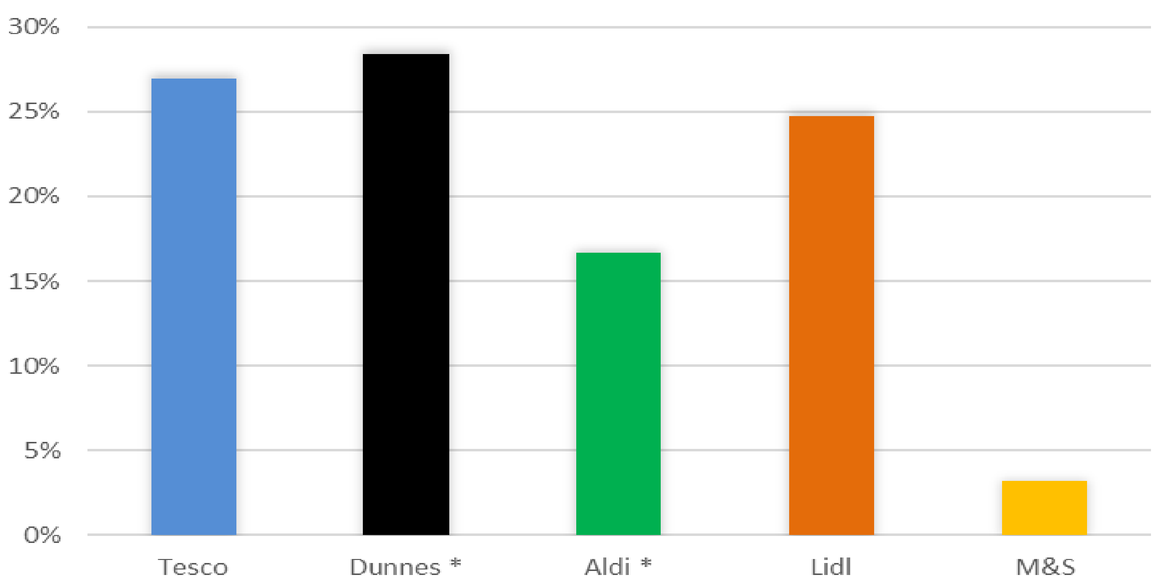
This comprises of 36% comparison goods units (80% of retail floorspace) and 9% being convenience goods units (20% of retail floorspace). 38% of all units surveyed along West Street are occupied by leisure or retail service units such as cafes, restaurants, accommodation or hair salons / barbers. Drogheda has a wide range of national and international retailers, within the convenience, comparison and bulky comparison sectors. In terms of convenience shopping there are five multi-national retailers presently trading. It is noted that Supervalu ceased trading at Stockwell Lane in Drogheda town centre in 2016, contributing to a further reduction in town centre footfall. Current convenience operators are outlined in Table 2.0;

Table 2.0 – Principal Convenience Operators within Drogheda

Convenience Operator	Location
Tesco *x 2*	West Street and Matthews Lane
Dunnes Stores *x 3*	West Street, Scotch Hall SC and Southgate SC
Marks & Spencer	Laurence SC
Aldi *x 2*	Donore Road Retail Park and Slane Road
Lidl *x 2*	Donore Road and M1 Retail Park

In total the above operators trade from approximately 13,600 sq.m. of grocery floorspace, with Tesco and Dunnes Stores holding the highest percentage share within the town. This is inclusive of Aldi at Donore Road Retail Park and Dunnes Stores at Southgate Shopping Centre, both of which are located in Drogheda but within the Meath county boundary.

Figure 2.0 – Percentage Share of Grocery Floorspace within Drogheda



***Inclusive of Donore Road Retail Park and Southgate Shopping Centre, both located within County Meath**

In terms of comparison shopping, the majority of major comparison retailers are located within the shopping centres. Shaws Department Stores and Marks & Spencer anchor the Laurence Shopping Centre. Scotch Hall includes a number of national and international comparison retailers including Carraig Donn, River Island and Lifestyle Sports. While the town centre streets generally comprise of independent retailers, there remain just a few major retailers such as Penneys and Elverys Intersport on West Street.

A range of national and international bulky comparison retailers are located within the M1 Retail Park and Drogheda Retail Park. The M1 Retail Park is anchored by Woodies and includes operators such as EZ Living, Smyths Toys and Sports Direct. Drogheda Retail Park (within the Meath County boundary) is anchored by Homebase, Harvey Norman, TK Maxx and Homestore & More.

1.4.1.5 Vacancy

It is generally accepted that all town centres will experience some level of vacancy caused by changes to ownership, redevelopment plans or expiration of leases. The latest available Geodirectory data on commercial vacancy sees Drogheda with a vacancy rate of 17.4% (GeoView Commercial Property Report Q4, 2019). This represents a slight decline in year on year vacancy, which was 18.1% the year previous (Q4, 2018). Nonetheless, it is evident from the land use survey that there are significant sustained levels of vacancy within the town centre, particularly at Narrow West Street (as discussed within Section 1.4.1.3, Environmental Quality and Amenity). Furthermore, there are significant levels of vacancy within the Laurence Shopping Centre and to a lesser extent within Scotch Hall Shopping Centre.

It is noteworthy that there were no vacant retail units within either the M1 Retail Park or Drogheda Retail Park when the survey was conducted.

1.4.1.6 Health Check Conclusions & Recommendations

It is clear from the Drogheda Town Centre Health Check that the town continues to have a vibrant town centre and supports Drogheda's function as a Regional Growth Centre. However, the town centre faces significant challenges. There is a proliferation of vacant properties evident along Narrow West Street. Development economics dictates that greenfield development is more cost effective and more simply developed compared to brownfield town centres. The suburbanisation of Drogheda, particularly with regard to retail developments is reflected in areas of underuse, dereliction and vacancy. Narrow West Street and its environs is an area in Drogheda reflective of these challenges.

The town centre has expanded eastwards with the development of Shopping Centres at Laurence Street and Scotch Hall. However, the poor pedestrian linkages between the traditional town centre streets and the Scotch Hall Shopping Centre are not conducive to a functioning consolidated town centre.

In general, the proliferation of vacant properties has diminished Drogheda's vitality and viability and is a matter that requires action. These vacant properties include high profile units such as the former Permanent TSB and Choice premise on West Street and the former Supervalu premises on Stockwell Lane.

It is noted that if the overarching proposals contained within the Westgate Vision are achieved there would be a significant improvement in the environmental quality and amenity value at the western end of the town centre. In addition, the following actions should be considered in maintaining the future health of Drogheda's town centre.

- Where high levels of sustained vacancy are evident, uses other than retail should be considered where this would contribute towards improving the overall vitality and viability of the town centre and which complement the town centre retail offer;
- Enhance and protect Drogheda's historic built environment through the implementation of the Westgate Vision;
- Encourage redevelopment and reuse of opportunity sites and proactively engage landowners to develop key vacant sites including 'retail opportunity sites' identified in Section 1.6.2;
- Encourage additional international and national retailers which would attract additional footfall and improve retail experience;
- Focus on consolidating the existing town centre and retail core with significant emphasis on improving the public realm and pedestrian linkages between the historic town core and the Scotch Hall Shopping Centre;
- Enhance the connection with the River Boyne frontage;
- Improving the environmental quality and amenity in the town centre by providing additional green infrastructure and public realm enhancements.

Section 1.5 of this Strategy provides a guide to the quantum of additional floor space potential envisaged for Drogheda up to 2030 and Section 1.6.2 of this Strategy identifies retail opportunity sites and the core retail area for Drogheda.

1.4.2 Dundalk

Dundalk is the county town of County Louth and Ireland’s third largest town, behind Drogheda and Swords. The town had a population of 39,004 in 2016 (Census 2016). The total population of Dundalk grew by 1,188 (3.1%) between 2011 and 2016. In the period 2002-2016 the population of the town increased by 20%. As with Drogheda, Dundalk has also been designated as a Regional Growth Centre within the National Planning Framework.

1.4.2.1 Attractions

Dundalk’s retail catchment stretches south towards Ardee and Dunleer, west towards Carrickmacross and north towards Newry. The catchment area comprises of 20,328 households within a 10 kilometre radius. Dundalk’s proximity to the border results in a catchment area which takes in areas of Northern Ireland such as Crossmaglen and Forkhill.

The traditional town core of Dundalk is focused on the streets of Park Street, Earl Street, Market Square and Clanbrassil Street. Retail within the town centre is predominantly driven by independent comparison outlets and cafes. Dundalk has two main shopping centres, the Marshes Shopping Centre and the Longwalk Shopping Centre. The Marshes Shopping Centre is very much the main shopping destination within the town.

Dundalk is a gateway to a number of areas of outstanding natural beauty, namely the Cooley Peninsula, Mourne Mountains and Ring of Gullion, while also offering a wealth of recreational facilities such as the Táin Theatre and the Louth County Museum.

Dundalk Stadium, an all-weather horse racing track, provides an amenity which draws patrons from throughout Ireland. The tourism industry affords significant potential for economic development and employment opportunities in Dundalk.

Dundalk Institute of Technology (DkIT) is a major asset to Dundalk in terms of the provision of a high quality third level institution and as a catalyst for economic development. DkIT draws students from across the north east region and has significantly expanded its campus facilities in recent years to include additional campus buildings and a dedicated sports centre.

Dundalk is a long established and proven business location. Multinational companies operating in the area include eBay, Paypal, National Pen and Prometric. WuXi Biologics, a leading global biologics medicine manufacturer, is investing €325 million in a new biopharmaceuticals contract manufacturing facility in the town. The facility will further boost employment in the region, with total employment on the campus expected to be 600 by 2024.

Dundalk is well served in terms of quality open spaces. These areas include St. Helena's Park and Ice House Hill Park. There are also dedicated walking trails along Dundalk Bay at the Navvy Bank and walking and cycling tracks along the Castletown River at The Riverside Walk.

1.4.2.2 Accessibility

As with Drogheda, Dundalk is located along the Dublin-Belfast Economic Corridor and is very well connected by road and rail. Dundalk is located equidistant along the M1 between Dublin and Belfast. Drive times to Dublin (M50) are approximately 45 to 50 minutes. Drive times to Belfast are approximately 60 minutes via the M1 and A1. Dundalk's location on the M1 provides good access to Dublin Airport (45 minutes), Belfast International Airport (75 minutes) and George Best Belfast City Airport (65 minutes).

The existing road infrastructure also provides good connectivity to other towns within the northeast of the country. Ardee is an approximate 20 minute drive via the N52, while Carrickmacross and Castleblayney are a 25 minute drive via the R178 and N53 respectively. The Inner Relief Road (N52) provides an orbital route around the eastern side of the town and contributes to a relatively good flow of traffic within the town centre.

Public and private bus operators provide strong local, regional and intercity connections. At a local level Bus Eireann and Halpenny Travel provide regular connections between suburban areas such as Muirhevnamor and Blackrock and the town centre.

Bus Éireann provides services between Dundalk and neighbouring towns such as Ardee, Dunleer and Carlingford, as well as a high frequency service between Dundalk and Dublin Airport via Drogheda. Matthews Coaches provide high frequency services between Dundalk and Dublin (including connections to the IFSC, DCU and UCD).

Services operate direct between Dundalk and Dublin during peak hours and via Drogheda during off peak hours. As with Drogheda, Dundalk also benefits from its location along the Dublin-Belfast railway line. The intercity 'Enterprise' service between Dublin and Belfast provides 55 minute journey times between Dundalk (Clarke Station) and Dublin Connolly and 75 minute journey times to Belfast.

Peak time commuter services also provide for 70 minute journey times between Dundalk and Dublin Connolly. All day car parking at Dundalk train station is provided at a flat rate of €3.50, with reduced charges for weekly, monthly or annual tickets.

On street parking is available within the town centre at a rate of €1.10 per hour, with contactless parking metres in place within the town centre. All day parking exists at Linenhall Street, Ramparts Road and Long Walk public car parks and is charged at €2 for the day.

The Marshes Shopping Centre provides the largest private car park within the town centre. This includes 1,350 designated pay and display spaces. The Longwalk Shopping Centre offers over 450 free car parking spaces while the Clanbrassil centre car park accommodates 130 parking spaces at a rate of €1.20 per hour. All car parks are easily accessible and at surface level.

1.4.2.3 Environmental Quality and Amenity

Market Square and Earl Street provide an attractive environment and strong focal point for the town centre of Dundalk. As a retail environment Clanbrassil Street is underperforming as the quality of the streetscape environment has not been managed holistically. Louth County Council has recently redeveloped the Market Square which has proven successful in terms of the regeneration of the area led by a public realm improvement project. Newly developed buildings along the southern side of Market Square bookmark an end of the Square that was neglected for years, and gives it the prominence it deserves. The upgrade of Market Square also provides greater pedestrian permeability within the area. However, there are notable buildings along the junction of Crowe Street and Earl Street which continue to detract from the visual appearance of Market Square.

There is a general clean appearance to the principal shopping areas within the town centre. It is notable that Dundalk achieved ‘Cleaner than European Norms’ in the 2018 An Taisce Report IBAL Anti-Litter League. Dundalk ranked 9th out of 40 towns / cities surveyed throughout Ireland.

There is notable decay and decline evident within the northern end of the town centre, particularly along the northern extents of Clanbrassil Street and Church Street. This area is now the subject of a ‘Part 8’ planning permission (Reg. Ref. 18/65) for a series of town centre improvements. The Clanbrassil Street and the St. Nicholas Quarter scheme extends from the existing Market Square northwards encompassing Clanbrassil Street in its entirety. It also includes Bridge Street, Linenhall Street and Northgate Street. The Quarter stops at the Castletown River.

The approach to design on the main retail thoroughfare (Clanbrassil Street) is to rebalance the public realm surfaces in favour of the pedestrian. The design proposes a substantial increase in the footpaths on either side of the street.

The works are ongoing and include resurfaced granite footpaths, the provision of an urban public open space with wider footpaths, planting and seating between the St. Nicholas church of Ireland and the St. Nicholas Roman Catholic Church and improved pedestrian crossings at various intersections. The proposal will involve narrowing traffic lanes and tightening corner radii at junctions to better facilitate on-road cycling.

Development works include the addition and removal of trees, the inclusion of new public lighting, new street furniture and public art. It is envisaged that the completion of this project will substantially improve the environmental quality and amenity of this area of the town.

The Longwalk and Carroll Village area of the town also require a degree of intervention. The areas incorporate the declining Longwalk Shopping Centre, the now defunct Carroll Village Shopping Centre and the rear of the Clanbrassil Centre.

The area is presently characterised by a vast amount of surface car parking and the public realm is impacted by the inactive rear of properties along Clanbrassil Street. The area is in need of rejuvenation and would benefit from improved linkages with Clanbrassil Street.

1.4.2.4 Diversity of Uses and Multiple Representation

Dundalk has a diverse range of uses and high levels of multiple representation. However, while this statement is applicable to the town as a whole, the traditional town centre is notably lacking in multiple representation. The majority of multiples trading in Dundalk are trading from the Marshes Shopping Centre and not along the traditional streets of Clanbrassil Street, Earl Street, Market Square or Park Street.

Furthermore, the land use survey of the traditional shopping areas in Dundalk (Clanbrassil Street, Earl Street, Market Square and Park Street) indicates that there is a low proportion of retail units within the core retail area. Of the total units surveyed within Clanbrassil Street, Earl Street, Market Square and Park Street 37% were occupied by retail uses. This comprises of 36% comparison goods units (84% of retail floorspace) and 6% being convenience goods units (16% of retail floorspace). 36% of all units surveyed within this area were occupied by leisure or retail service units such as cafes, restaurants, accommodation or hair salons / barbers.

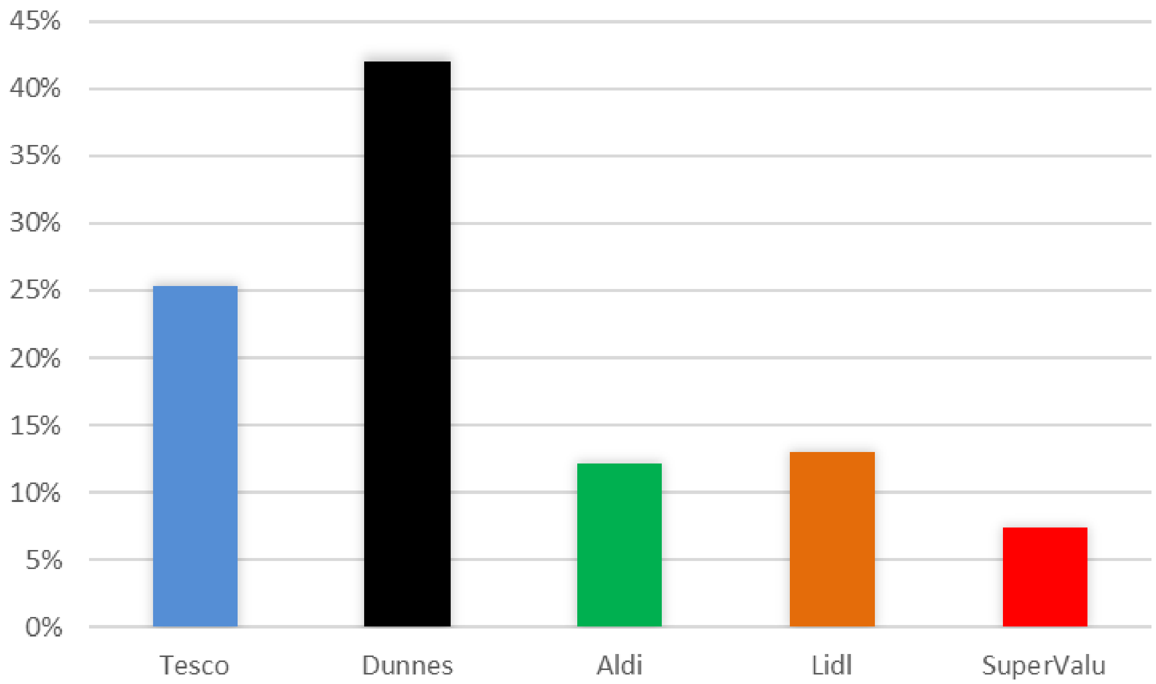
In terms of convenience shopping there are five multi-national retailers presently in operation within Dundalk. Current convenience operators are outlined in Table 3.0;

Table 3.0 – Principal Convenience Operators within Dundalk

Convenience Operator	**Location**
Tesco *x 2*	Tesco Extra and Longwalk SC
Dunnes Stores *x 3*	Ard Easmuinn, Marshes SC and Neighbourhood Centre
Supervalu	Fairways Centre
Aldi *x 2*	Ramparts and Newry Road
Lidl *x 2*	St. Helenas and Avenue Road

In total, the above operators trade from approximately 19,100sq.m. of grocery floorspace, with Dunnes Stores holding the highest percentage share within the town.

Figure 3.0 – Percentage Share of Grocery Floorspace within Dundalk



The Marshes Shopping Centre is the main destination for comparison shopping within Dundalk. The centre is anchored by Penneys and Dunnes Stores (which includes a significant clothing and homewares offer). The centre also includes a number of national and international comparison retailers including Carraig Donn, Clarks, H&M, Jack & Jones, River Island, New Look and Lifestyle Sports. A range of bulky comparison retailers are located within Dundalk Retail Park, located on the Inner Relief road. The retail park is anchored by Woodies and includes operators such as Homestore & More, Smyths Toys, Sports Direct and Currys PC World. There were only two vacant units within the retail park when the survey was conducted.

It is noted that much of the former Harvey Norman has been repurposed for an Omniplex cinema. North Link Business Park, also located on the Inner relief Road houses a number of bulky comparison operators including, Franks Furniture, Wogan Interiors and The Bed Store.

1.4.2.5 Vacancy

The latest available Geodirectory data on commercial vacancy indicates that Dundalk has a vacancy rate of 19% (GeoView Commercial Property Report Q4, 2019). This represents an increase of 0.3% from Q4, 2018. This rate is also significantly higher than the national vacancy rate of 13.2% and the rate for Leinster (excluding Dublin) which is 12.4%. The land use survey conducted for this Retail Strategy identified significant levels of vacancy along some of the principal shopping streets in the town. 19% of units surveyed on Park Street were vacant. It is noteworthy that a sale has been agreed for the prominent former Dunnes Stores premises. 24% of units on Clanbrassil Street were vacant at the time of conducting the survey. The majority of the retail vacancy was evident at the northern end of the street, with higher levels of occupancy closer to Market Square.

The Longwalk Shopping Centre has declined significantly since the last Retail Strategy was published. The closure of the Penneys anchor in 2014 has significantly reduced footfall in the centre and has contributed towards further store closures. The centre now has approximately 50% vacancy (both in terms of floorspace and the number of units), while the Marshes Shopping Centre enjoys near full occupancy.

1.4.2.6 Health Check Conclusions & Recommendations

The overall offer of Dundalk town centre remains strong and in keeping with the towns status as a Regional Growth Centre. However, a twin track retail environment has developed within the town.

It is evident from the health check assessment that there are many areas within Dundalk town centre which are experiencing a decline. The traditional town centre streets have high vacancy levels, together with the declining Longwalk Shopping Centre. Elsewhere, the Marshes Shopping Centre has minimal vacancy. The centre provides for larger floorplates to meet the needs of modern retailing and has thrived, somewhat at the expense of the remainder of the town centre.

However, improvements are evident within the traditional town centre. The refurbishment of Market Square has brought about increased activity to the Clanbrassil Street & Earl Street area of the town centre. It has also become an attractive public space and accommodates public events and seasonal festivities. There is a need to build on the success of the Market Square project and it is hoped that works ongoing as part of the Clanbrassil Street and the St. Nicholas Quarter scheme can deliver such benefits for the northern environs of the town centre. In addition, the following actions should be considered in relation to Dundalk town centre.

- Prepare a framework plan for the regeneration of the Longwalk area (including Longwalk Shopping Centre and Carroll Village) of the town centre;
- Where high levels of sustained vacancy are evident, uses other than retail should be considered where this would contribute towards improving the overall vitality and viability of the town centre and which complement the town centre retail offer;
- Establish improved connectivity between Clanbrassil Street and the Longwalk;
- Establish improved connectivity between the traditional town centre and the Marshes Shopping Centre through the re-development of Williamsons Mall;
- Encourage redevelopment and reuse of opportunity sites and proactively engage landowners to develop key vacant sites including ‘retail opportunity sites’ identified in Section 1.6.2;
- Strategic planning, design and landowner engagement for the reuse and activation of key areas/sites within the town centre including the former Dunnes Stores premises on Park Street, Williamsons Mall and the northern environs of Clanbrassil Street & St. Nicholas Quarter.

Section 1.5 of this Strategy provides a guide to the quantum of additional floor space potential envisaged for Dundalk up to 2030 and Section 1.6.2 of this Strategy identifies retail opportunity sites and the core retail area for Dundalk.

1.4.3 Ardee

Ardee is the third largest town within County Louth. The town had a population of 4,828 in 2016 (CSO 2016).

1.4.3.1 Attractions

Ardee serves as a retail centre for mid Louth. The town's catchment area extends northwards to Tallanstown, south towards Collon, east towards Dunleer and west taking in areas within County Meath. Ardee also provides a range of services and employment for the town's population and its wider rural catchment.

Ardee's retail streetscape is linear in form. The main shopping area is focused on Market Street and Castle Street which runs from north to south. The town centre is characterised by independent retailers, cafes, pubs, retail services and financial institutions. The main supermarkets are located at Ash Walk, off Castle Street (Supervalu) and Lidl, on the southern environs of the town.

Ardee is a medieval walled town, with its distinctive, central main street from which its long narrow properties extend outwards. It's identity as a walled town is further enhanced by surviving medieval buildings and features notably Ardee Castle and Hatch's Castle and the intact medieval street pattern. Ardee Castle is the largest fortified medieval tower house in Ireland which was built circa 15th century. Ardee has maintained its medieval street pattern and is an important town in terms of national and local built heritage, reflected in the Architectural Conservation Area and numerous historic buildings and protected structures.

Ardee also acts as a significant business and employment centre for mid Louth. Much of the industry and employment activity occurs within Ardee Business Park, a mix of office and industrial rental space located east of the town centre. Significant employers in the town include ABP Food Group Meats and Pro Stainless Design.

The Fair Green public park, bounded by the Carrick Road and Golf Links Road to the north of the town is the main area of public open space within the town. There are also dedicated walkways along the River Dee to the south of the town centre. Both amenities are conveniently located adjacent to the town centre.

1.4.3.2 Accessibility

Ardee is located at the intersection of the N2 national primary Dublin to Derry route and the N52 national secondary Ardee to Mullingar/Nenagh route. The N33 provides direct access from Ardee to the M1 motorway and national motorway network. Ardee is a 5 minute drive time from Junction 14 on the M1. Both Dundalk and Drogheda are approximately 20 minute drive from via the N52 and M1 respectively. Carrickmacross is also within a 20 minute drive time of Ardee via the N2.

The N2 Dublin to Derry national route passes through the town centre which is the cause of significant traffic congestion, particularly at peak times. The proposed N52 Ardee Bypass scheme will help to alleviate much of this congestion. Louth County Council are currently conducting a detailed review of the scheme, considering alternative junction strategies and undertaking an appraisal of the options to deliver the optimal solution.

Bus Eireann provide a network of local bus routes. These include Dundalk (167), Drogheda & Monaghan (182/182A). Expressway Route 32 also provides a connection northbound to Letterkenny and southbound to Dublin Airport. Private bus operators also provide connections to Carrickmacross and Dublin City Centre.

On-street parking is available within the town centre. Pay parking is not in operation within the town. Off street car parking is provided at Ash Walk, at the Supervalu Shopping Centre and adjacent overflow car park.

1.4.3.3 Environmental Quality and Amenity

Ardee’s traditional streetscape and built heritage provide a natural identity for the core shopping area. The town centre environment is greatly enhanced by its natural heritage which is striking along Castle Street and Market Street. These assets include Ardee Castle, Hatch’s Castle and St. Marys Abbey.

Ardee also benefits from good quality open space provision at either end of the core shopping area. The Fair Green is located to the north of Market Street and provides for a well maintained amenity. The River Dee flows along the southern end of the Castle Street and a number of associated walkways are provided along the river bank.

The overall environmental quality of the core shopping streets is heavily impacted by traffic congestion. Both Castle Street and Market Street are on the N2 route which accommodates significant through traffic. This results in a poor shopping environment and is not conducive to a pedestrian or cycle friendly town centre environment. In the longer term, the proposed N52 Ardee Bypass scheme will help to alleviate much of this congestion and will greatly benefit the town as a whole.

The unfinished supermarket development at Ash Walk detracts from the overall appearance of the immediate area. The unfinished development also detracts from the environmental quality of Market Street, where there is limited pedestrian permeability through to the Supervalu development and significant retail vacancy fronting onto Market Street.

1.4.3.4 Diversity of Uses and Multiple Representation

Ardee has a low representation of multiples within the town. Comparison retailing within the town is largely catered for by independent retailers. The town includes a number of long established retailers such as O'Neills Menswear and Paul Sharkey & Sons. The level of retailing within the town is reflective of the town's position within the County Settlement Hierarchy. Higher order comparison shopping is catered for by the two regional growth centres in the county, Drogheda and Dundalk.

In terms of convenience shopping there two of the main retailers are operating within Ardee. Spar and Centra also trade from smaller convenience outlets within the town centre.

Table 4.0 – Principal Convenience Operators within Ardee

Convenience Operator	Location
Supervalu	Ash Walk
Lidl	Dublin Road

In total, the above operators trade from approximately 3,500 sq.m. of grocery floorspace, with Supervalu being the largest convenience operator within the town.

1.4.3.5 Vacancy

Ardee records the lowest level of vacancy amongst the three largest towns in the county (Drogheda, Dundalk and Ardee). The commercial vacancy recorded for the town is 15.1% (GeoView Commercial Property Report Q4, 2019). However, this represents a significant increase of 3.5% from Q4, 2018 (up from 11.6%).

The land use survey conducted for this Retail Strategy recorded 14% vacancy amongst the retail units along Castle Street and Market Street. The most notable area of vacancy was the former Supervalu premises on Market Street and the former Ardee bakery premises on Castle Street.

1.4.3.6 Health Check Conclusions & Recommendations

In undertaking this health check, it is clear that Ardee's town centre is in good health with a relatively low vacancy rate in comparison to other towns within the county. However, the town continues to suffer from significant traffic congestion and some high profile retail vacancy within the core retail area.

The following actions should be considered in maintaining the future health of Ardee's town centre;

- The preparation and implementation of a public realm strategy for Ardee, to make improvements to the streetscape;
- Establish a stronger pedestrian connection between Ash Walk and Market Street;
- Proactive engagement with landowners to remedy vacant units to the east of the existing Supervalu development which front onto Market Street;
- Focus on expanding the retail offer with a local craft and design offer, complementing the heritage and visitor attraction of the town.

Section 1.5 of this Strategy provides a guide to the quantum of additional floor space potential envisaged for Ardee up to 2030 and Section 1.6.2 of this Strategy identifies retail opportunity sites and the core retail area for Ardee.

1.5 QUANTITATIVE ANALYSIS - PROJECTED RETAIL FLOORSPACE REQUIREMENTS

NOTE: A Retail Strategy Quantitative Analysis for Dundalk was carried out as part of the preparation of the Dundalk Local Area Plan (See Appendix 3 of Dundalk LAP) which includes updated quantitative analysis at County and settlement (Dundalk) level. Refer to Appendix 3 of the Dundalk LAP for updated details.

This section of the Retail Strategy provides a quantitative analysis of the estimated amount of retail floorspace required for Drogheda, Dundalk and Ardee. The assessment covers the period from 2019-2030 which enables a longer term look at retail planning in the County. This includes the Plan period from 2021-2027 and three years beyond this up to 2030.

Drawing upon the quantitative analysis of expenditure patterns and future growth projections, this study provides indicative guidance on the scope and need for new retail floorspace and how it should be allocated within the Retail Hierarchy, having regard to the retail role and function of each centre.

Based on projected changes in the county population, consumer spending and turnover potential, the assessment takes account of emerging trends in the retail market and general estimates of future demand. It is important to note that the estimates of future requirements for retail floor space provided by this strategy are only intended to provide broad guidance as to the additional quantum of convenience and comparison goods floor space provision. The reason for this is so healthy levels of trading can be sustained and should not be treated in an overly prescriptive manner, nor should they serve to inhibit competition - as per the requirements of the Retail Planning Guidelines 2012.

The following methodology has been used to inform the future retail floor space requirements:

- Estimate of population at base and design year;
- Estimate of expenditure per capita on convenience, comparison and bulky household goods at the base and design year;
- Compile a projection of the total available expenditure in the base year and design year for residents of County Louth to allow for assumed expenditure inflows and outflows;
- Estimates of likely increase in future expenditure available for the provision of additional floorspace;
- Estimates of the likely average turnover of new floorspace for convenience, comparison and bulky household;
- Estimate the capacity of additional floorspace in County Louth;
- Estimate the amount of vacant retail floorspace;
- Allocation of floorspace between the main settlements in the County i.e. Drogheda, Dundalk and Ardee. For the purposes of this retail strategy the study area pertains to the administrative boundary of County Louth. Areas of Drogheda which are within the administrative boundary of County Meath are not included. This relates to population and retail centres such as Southgate Shopping Centre and Drogheda Retail Park.

1.5.1 Population

County Louth has experienced substantial population growth, with the most sizeable increases occurring since 2002. An analysis of Census figures between 2002 and 2016 reveals that the population of the County expanded from 101,821 to 128,884 representing an increase of 26.6%.

The assessment of future floorspace requirements requires projected population growth over the plan period and up to 2030. The future population projections for County Louth as set out within Appendix 2 of the NPF Implementation Roadmap are used by this strategy as shown in Table 5.0. The population projections are also consistent with those used throughout the Louth County Development Plan 2021-2027.

Table 5.0 – Population Projections

	2016*	2019	2021**	2027**	2030**
Population	128,884	134,322	138,074	149,970	151,116

* CSO Census 2016

*** NPF Implementation Roadmap*

1.5.2 Retail Expenditure Estimates

Expenditure per capita is calculated based on the data contained within the CSO's Annual Services Inquiry (ASI). The ASI is listed as the preferred source for expenditure per capita in the Roger Tym and Partners and Jonathan Blackwell and Associates Report on the Retail Planning Guidelines 2012. The ASI, also now known as the Structural Business Statistics Release provides grossed estimates of the principal trading aggregates for all enterprises in the retail sectors. The relevant turnover aggregates as related to sectors specifically classed as either convenience, comparison or bulky goods sales are selected.

The 2016 national expenditure per capita figure for convenience goods is estimated at €3,769 and for comparison goods is estimated at €3,417. This is calculated by dividing the total national expenditure on convenience and comparison goods (as per ASI 2016) by the population of Ireland (Census 2016).

An adjustment is made for County Louth to relate these national figures to local level. CSO publication County Incomes and Regional GDP (published 2017) indicates that the County Louth expenditure figures were approximately 93.8% of the national average in 2016. The expenditure figures are amended accordingly to more accurately reflect retail spend at a local level.

Further adjustments are made to this figure to bring it forward, year on year, up to 2030. In considering growth rates for expenditure per capita, regard has been had to the recent trends observed from the CSO Retail Sales Index. The Retail Sales Index for December 2019 indicates a continued growth in the sector. Annual growth of 3.9% was seen across 'All Businesses excl. Motor Trades, Fuel & Bars'.

'Food businesses' experienced an annual increase of 3.1% while 'Non-food' businesses experienced growth of 3.8%. Strong growth was posted within many sections of the 'Non-food' sector including Clothing, Footwear & Textiles (+3.0%), Furniture & Lighting (+5.6%) and Electrical Goods (+13.8%).

Expenditure growth rates on comparison goods have traditionally been significantly higher than expenditure growth rates on convenience goods. This is because most household's requirement in respect of convenience products have been largely satisfied and most surplus or discretionary spend has gone into products such as clothing, footwear, household goods, electrical goods, home furnishings etc. Growth rates for comparison expenditure are inclined to increase substantially within a strong national economy.

However, for the purposes of this assessment more conservative annual growth rates have been assumed for expenditure per capita. Adjustments of 1% growth per annum for convenience expenditure and 2.5% for comparison expenditure are made in line with recorded economic growth statistics and forecasted levels of growth. The growth rates take cognisance of the CSO Retail Sales Index, the ESRI Quarterly Economic Commentary (Winter 2019) and the ESRI Ireland's Economic Outlook.

Table 6.0 – Projected Per Capita Spend (€)

	Convenience	Comparison
2016	€3,769	€3,417
2019	€3,883	€3,680
2021	€3,961	€3,866
2027	€4,205	€4,483
2030	€4,332	€4,828

1.5.3 Total Available Expenditure

Total available expenditure within County Louth is calculated by multiplying the population of the County by the expenditure per capita for each retail category, for each year. This is set out below in Table 7.0.

For the purpose of this retail strategy it is necessary to differentiate between comparison non-bulky goods and bulky household goods. Considerably different levels of turnover will apply to comparison goods such as clothing and footwear and smaller household durables than would apply to bulky household goods, typically sold in retail warehouse parks. It is therefore essential to split between expenditure available for bulky comparison goods and non-bulky comparison goods.

Therefore, having regard to the CSO Household Budget Survey and market research estimates, an 80:20 split is applied to the total available comparison spend. This is broken down within the two right hand columns of Table 7.0.

Table 7.0 - Total Available Spend (€)

Year	Convenience	Comparison	Comparison Non Bulky (80%)	Comparison Bulky (20%)
2019	€521,572,326	€494,304,960	€395,443,968	€98,860,992
2021	€546,911,114	€533,794,084	€427,035,267	€106,758,817
2027	€630,623,850	€672,315,510	€537,852,408	€134,463,102
2030	€654,634,512	€729,588,048	€583,670,438	€145,917,610

1.5.4 Adjusted Expenditure

Table 8.0 illustrates the adjusted retail spend for County Louth from 2019 to 2030. Given the absence of up-to-date survey data (due to the situation surrounding the Covid-19 pandemic in Ireland at the time of preparing this Strategy), the survey data from 2014 was relied upon to estimate spending inflows and outflows from County Louth. Given the limited changes to the retail landscape over the intervening period, it is unlikely that inflow and outflow patterns will have shifted significantly. In particular, no new retail developments of scale have come on stream in the wider region or within the County which would significantly alter inflows or outflows within the last five years.

One such area that has changed is Irish consumer's propensity for online shopping. Given that online spend has increased incrementally since the completion of the previous Retail Strategy, growth rates have been applied to the outflow percentages.

These growth rates have been applied at a rate of 1% per annum for convenience expenditure and 2% per annum for comparison (bulky and non-bulky) expenditure. This increases the projected outflow rates by 2030 to 3.3% for convenience spend, 9.8% for comparison (non-bulky) spend and 11.2% for bulky comparison spend.

Table 8.0 – Adjusted Retail Spend

Convenience

Year	Convenience Total Available Spend (€)	Convenience - Outflow (%)	Convenience - Inflow (%)	Adjusted Convenience Total Available Spend (€)
2019	€521,572,326	3.0%	3.8%	€525,744,905
2021	€546,911,114	3.0%	3.8%	€551,286,403
2027	€630,623,850	3.2%	3.8%	€634,407,593
2030	€654,634,512	3.3%	3.8%	€657,907,685

Comparison

Total Available Expenditure - Comparison Goods (Non-Bulky)				
Year	**Comparison Total Available Spend (€)**	**Comparison - Outflow (%)**	**Comparison - Inflow (%)**	**Adjusted Comparison Total Available Spend (€)**
2019	€395,443,968	7.9%	8.0%	€395,839,412
2021	€427,035,267	8.2%	8.0%	€426,181,197
2027	€537,852,408	9.2%	8.0%	€531,398,179
2030	€583,670,438	9.8%	8.0%	€573,164,371

Bulky Comparison

Total Available Expenditure - Comparison Goods (Bulky)				
Year	**Bulky Comparison Total Available Spend (€)**	**Bulky Comparison - Outflow (%)**	**Bulky Comparison - Inflow (%)**	**Adjusted Bulky Comparison Total Available Spend (€)**
2019	€98,860,992	9.0%	1.0%	€90,952,113
2021	€106,758,817	9.4%	1.0%	€97,791,076
2027	€134,463,102	10.6%	1.0%	€121,554,644
2030	€145,917,610	11.2%	1.0%	€131,034,013

1.5.5 Existing Retail Floorspace

An updated survey of existing retail floorspace in County Louth was conducted during 2019 and early 2020. The survey results provide a breakdown of the total net retail floorspace trading within Drogheda, Dundalk and Ardee. A summary of the results is shown in Table 9.0 below:

Table 9.0 – Existing Retail Floorspace in County Louth

Settlement	Convenience (sq.m)	Comparison (sq.m)	Bulky Comparison (sq.m)	Total (sq.m)
Dundalk	24,128	39,844	25,053	89,025
Drogheda	16,376	32,922	21,998	71,296
Ardee	4,729	3,294	-	8,023
Total	45,233	76,060	47,051	168,344

Tables 9.0 provides a breakdown of trading retail floorspace within County Louth and does not take into consideration retail floor space that had been permitted but not yet constructed. It is noted that the number of extant permissions for retail floorspace within the County is very limited.

The overall 2019 baseline figures indicate that 45% of all retail floorspace in the County is of the comparison goods retail category, while bulky comparison and convenience account for 28% and 27% respectively.

1.5.6 Turnover of Existing Floorspace

The indicative turnover ratio of the existing floor space in County Louth is calculated by dividing the available resident expenditure in 2019 by the existing floorspace in each category. The indicative turnover figures are an estimate of the amount of expenditure that is currently being sustained by the amount of floor space in the County. Most retailers do not publish retail turnover figures in Ireland however, based on the limited published data the figures in Table 10.0 below suggest that each of the three categories are broadly operating at a healthy level within County Louth.

Table 10.0 – Turnover per sq.m.

	2019		
Retail Goods Types	**Available Expenditure (€)**	**Total Net Floor Area (sq.m)**	**Indicative Turnover Per sq.m. (€)**
Convenience	€521,572,326	45,233	€11,531
Comparison	€395,443,968	76,060	€5,199
Bulky Comparison	€98,860,992	47,051	€2,101

Table 10.0 shows the indicative turnover ratio per square metre for retail floorspace within the County. Generally those stores located in new shopping centres or in prime town centre locations are likely to have a greater turnover than those located in diminishing shopping centres or streets. It should also be noted that multi-national retailers or chains would expect to trade at a much higher

intensity than independent retailers. The figures in Table 10.0 represent an average turnover across all retail formats.

The residual surplus for additional retail floorspace within the County is obtained by subtracting the total available expenditure of existing floor space for convenience, comparison and comparison bulky goods set out in Table 10.0 by the total available expenditure for convenience, comparison and comparison bulky goods taking into account Outflow and Inflow levels as set out in Table 11.0.

Table 11.0 – Total Available Expenditure

Convenience

Year	Total Available expenditure taking into account Outflow and Inflow levels (€)	Total available expenditure of existing Floor space (€)	Residual Surplus(€)
2019	€525,744,905	€521,572,326	€4,172,579
2021	€551,286,403	€521,572,326	€29,714,077
2027	€634,407,593	€521,572,326	€112,835,267
2030	€657,907,685	€521,572,326	€136,335,359

Comparison

Year	Total Available expenditure taking into account Outflow and Inflow levels (€)	Total available expenditure of existing Floor space (€)	Residual Surplus(€)
2019	€395,839,412	€395,443,968	€395,444
2021	€426,181,197	€395,443,968	€30,737,229
2027	€531,398,179	€395,443,968	€135,954,211
2030	€573,164,371	€395,443,968	€177,720,403

Bulky Comparison

Year	Total Available expenditure taking into account Outflow and Inflow levels (€)	Total available expenditure of existing Floor space (€)	Residual Surplus(€)
2019	€90,952,113	€98,860,992	-€7,908,879
2021	€97,791,076	€98,860,992	-€1,069,916
2027	€121,554,644	€98,860,992	€22,693,652
2030	€131,034,013	€98,860,992	€32,173,021

1.5.7 Floorspace Capacity

To allow for future efficiency gains by retailers and in consideration of the economic forecasts, it is reasonable to assume a 1% increase per annum for turnover across all three retail categories. The turnover rates for each of the respective years are shown in Table 12.0.

Table 12.0 – Turnover Rates

	Convenience - Indicative Turnover Per sq.m. (€)	Comparison - Indicative Turnover Per sq.m. (€)	Bulky Comparison - Indicative Turnover Per sq.m. (€)
2019	€11,531	€5,199	€2,101
2021	€11,763	€5,303	€2,143
2027	€12,486	€5,630	€2,275
2030	€12,865	€5,800	€2,344

In order to calculate the requirements for additional retail floorspace within the County, the residual surplus is divided by the turnover per sq.m of future retail floorspace as set out in Table 12.0 above. The floorspace potential is set out in Table 13.0 below;

Table 13.0 – Floorspace Potential

Convenience

Year	Residual Surplus (€)	Turnover Ratio (€)	Additional Floorspace Potential (sq.m)
2019	€4,172,579	€11,531	362
2021	€29,714,077	€11,763	2,526
2027	€112,835,267	€12,486	9,037
2030	€136,335,359	€12,865	10,597

Comparison

Year	Residual Surplus (€)	Turnover Ratio (€)	Additional Floorspace Potential (sq.m)
2019	€395,444	€5,199	76
2021	€30,737,229	€5,303	5,796
2027	€135,954,211	€5,630	24,148
2030	€177,720,403	€5,800	30,641

Bulky Comparison

Year	Residual Surplus (€)	Turnover Ratio (€)	Additional Floorspace Potential (sq.m)
2019	-€7,908,879	€2,101	3,764
2021	-€1,069,916	€2,143	499
2027	€22,693,652	€2,275	9,975
2030	€32,173,021	€2,344	13,726

The above Table 13.0 outlines the broad requirements for additional retail floorspace within the County. However, the levels of retail vacancy must also be considered when projecting requirements for additional floorspace in future years. The survey undertaken by Louth County Council identified varying degrees of vacancy within each of the three sub categories. A summary of total retail vacancy is shown in Table 14.0;

Table 14.0 – Existing Vacant Floorspace

Town	Convenience (sq.m)	Comparison (sq.m)	Bulky Comparison (sq.m)
Dundalk	612	8,515	7,414
Drogheda	1,791	8,615	463
Ardee	155	2,269	-
Total	2,558	19,399	7,877

When calculating the amount of additional floor space required for convenience, comparison and bulky goods it is necessary to deduct the amount of existing vacant floor space from the overall requirement.

Table 15.0 – Indicative Floorspace Potential for County Louth

Convenience

Year	Additional Floorspace Potential (sq.m)	Vacant Floorspace (sq.m)	Indicative Floorspace Potential (sq.m)
2027	9,037	2,558	6,479
2030	10,597	2,558	8,039

Comparison

Year	Additional Floorspace Potential (sq.m)	Vacant Floorspace (sq.m)	Indicative Floorspace Potential (sq.m)
2027	24,148	19,399	4,749
2030	30,641	19,399	11,242

Bulky Comparison

Year	Additional Floorspace Potential (sq.m)	Vacant Floorspace (sq.m)	Indicative Floorspace Potential (sq.m)
2027	9,975	7,877	2,098
2030	13,726	7,877	5,849

Table 15.0 illustrates the capacity potential for each retail type, where existing vacant floorspace has been deducted.

Table 16.0 Indicative Floorspace Potential by Settlement – 2027

2027	Convenience (m^2)	Comparison (m^2)	Bulky Comparison (m^2)
Drogheda	3,060	2,243	1,043
Dundalk	2,696	1,976	919
Ardee	399	292	136
Remainder of County	324	238	-

Table 17.0 Indicative Floorspace Potential by Settlement – 2030

2030	Convenience (m^2)	Comparison (m^2)	Bulky Comparison (m^2)
Drogheda	3,797	5,310	2,908
Dundalk	3,345	4,678	2,562
Ardee	495	692	379
Remainder of County	402	562	-

*Updated figures for Dundalk are provided within the Retail Strategy for the Dundalk Local Area Plan 2025-2031. See Appendix 3 – Retail Strategy Quantitative Analysis of the Dundalk Local Area Plan for full details.

Tables 16.0 and 17.0 above set out the indicative potential for additional convenience, comparison and bulky comparison floorspace in the towns of Drogheda, Dundalk and Ardee to 2027 and 2030. The potential floor space capacity for each town is in accordance with the settlement and Retail Hierarchy of the County and has been proportioned in accordance with the population target of the aforementioned settlements for 2027.

In accordance with the Retail Planning Guidelines 2012, the indicative floorspace requirements set out in the tables above are only intended to provide broad guidance as to the additional quantum of floorspace provision.

The quantum of floorspace should not be considered as upper or lower limits, merely as indicative of the scale of new floor space required to meet the needs of existing and future population and expenditure within the County.

Any additional new floorspace proposed could replace some existing, outdated or poorly located retail floor space. In the event that a planning application is submitted for retail development which does not conform to the scale outlined in this retail strategy the onus is on the applicant to prove to the Planning Authority that the development will not detract from the vitality or viability of the town centre.

1.6 Retail Planning Policies and Criteria for Assessment of Retail Developments

This section follows on from the qualitative and quantitative assessment and provides policy direction and guidance to be included in the Louth County Development Plan 2021-2027.

The Retail Hierarchy is outlined for the County. This ranking is given to the range and quantity of retailing appropriate to a settlement as dictated by its role in the County Settlement Hierarchy. This section will also define the boundaries of the core shopping areas within Drogheda, Dundalk and Ardee and will identify opportunity sites of different sizes and in the different locations of the respective core retail areas. Retail planning policies, objectives and criteria for assessment of retail developments are set out within this section also.

1.6.1 Retail Hierarchy

The Retail Planning Guidelines 2012 require that the Retail Strategy sets out the Retail Hierarchy for the County. The Retail Hierarchy remains unchanged from the Louth County Retail Strategy 2014 and is set out in Table 18.0.

The Louth County Retail Hierarchy has regard to the Retail Hierarchy for the region identified within the Regional Spatial and Economic Strategy (RSES). Drogheda and Dundalk are the Level 1 retail settlements within the County, reflective of their status as Regional Growth Centres in the National Planning Framework (NPF).

Drogheda and Dundalk are followed by Ardee and three existing district centres in terms of retail order. Such centres are to provide an appropriate range of retail and non-retail function to serve the needs of the community and their respective catchment areas, with an emphasis on convenience and comparison shopping.

Table 18.0 Louth County Retail Hierarchy

Retailing Level	**Type of Centre**	**Centre**
Level 1	Major Town Centre / County Town	- Drogheda - Dundalk
Level 2	Town and/or District Centres and Sub County Town Centres	- Ardee - Drogheda District Centre: Matthews Lane - Dundalk District Centres: Dublin Road & Ard Easmuinn
Level 3	Neighbourhood Centres, Small Towns and Villages	- Dunleer - Annagassan - Bellurgan - Baltray - Castlebellingham/Kilsaran - Carlingford - Clogherhead - Collon - Dromiskin - Knockbridge - Louth Village - Omeath - Tallanstown - Termonfeckin - Tullyallen - Drogheda Neighbourhood Centres - Dundalk Neighbourhood Centres
Level 3	Neighbourhood Centres, Small Towns and Villages	
Level 4	Corner Shops and Small Villages	- Various

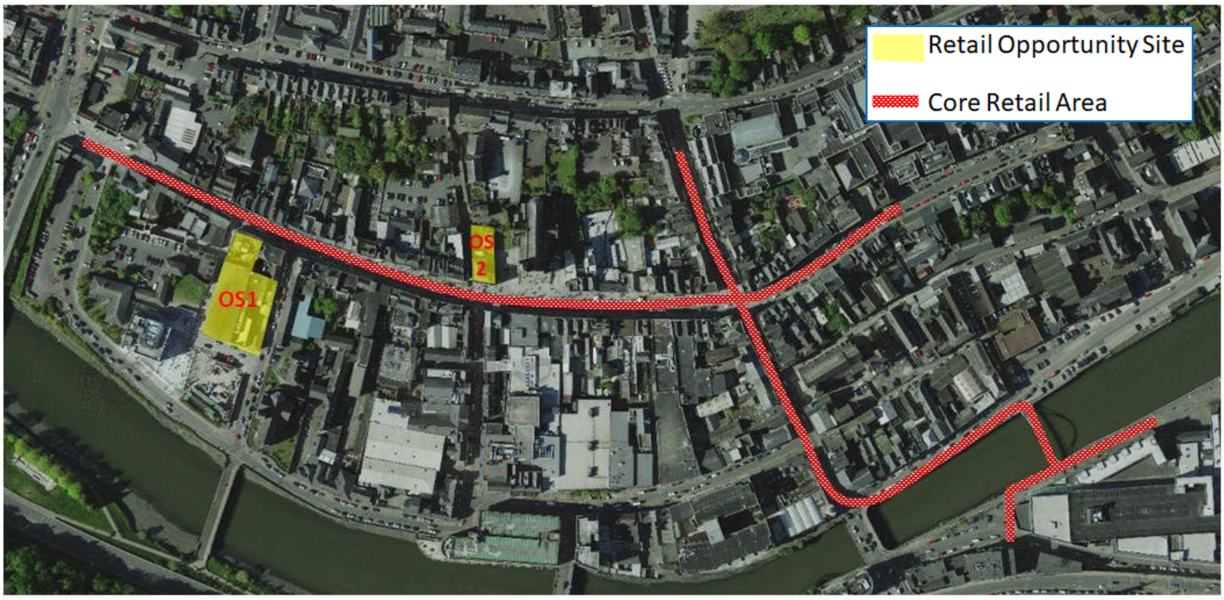
1.6.2 Core Retail Areas and Retail Opportunity Sites

A key function of the Retail Strategy is to define the boundaries of the core shopping areas of town centres and to identify opportunity sites which are suitable and available and which match the future retailing needs of the area. The following section identifies the core shopping areas and opportunity sites within Drogheda, Dundalk and Ardee.

1.6.2.1 Drogheda

The core shopping area of Drogheda is well established and covers an area from Narrow West Street to the east at Scotch Hall Shopping Centre. The core shopping area and retail opportunity sites for Drogheda are outlined in Figure 4.0.

Figure 4.0 – Drogheda Core Shopping Areas and Opportunity



Opportunity Site 1 (OS1); Abbey Shopping Centre

The Abbey Shopping Centre site sits within the core shopping area and is largely unoccupied but for a small number of tenants. The dilapidated nature of the building and the level of vacancy detract from the town centre of Drogheda. It also impacts on the vistas across the River Boyne from Georges Street, the main vehicular thoroughfare through Drogheda. The site also fronts onto Dominic Street surface car park, which is identified as an opportunity to provide a key public space of historical resonance within the Westgate Vision.

Figure 5.0 – Opportunity Site 1, Drogheda

Opportunity Site 2 (OS2); 98/99 West Street

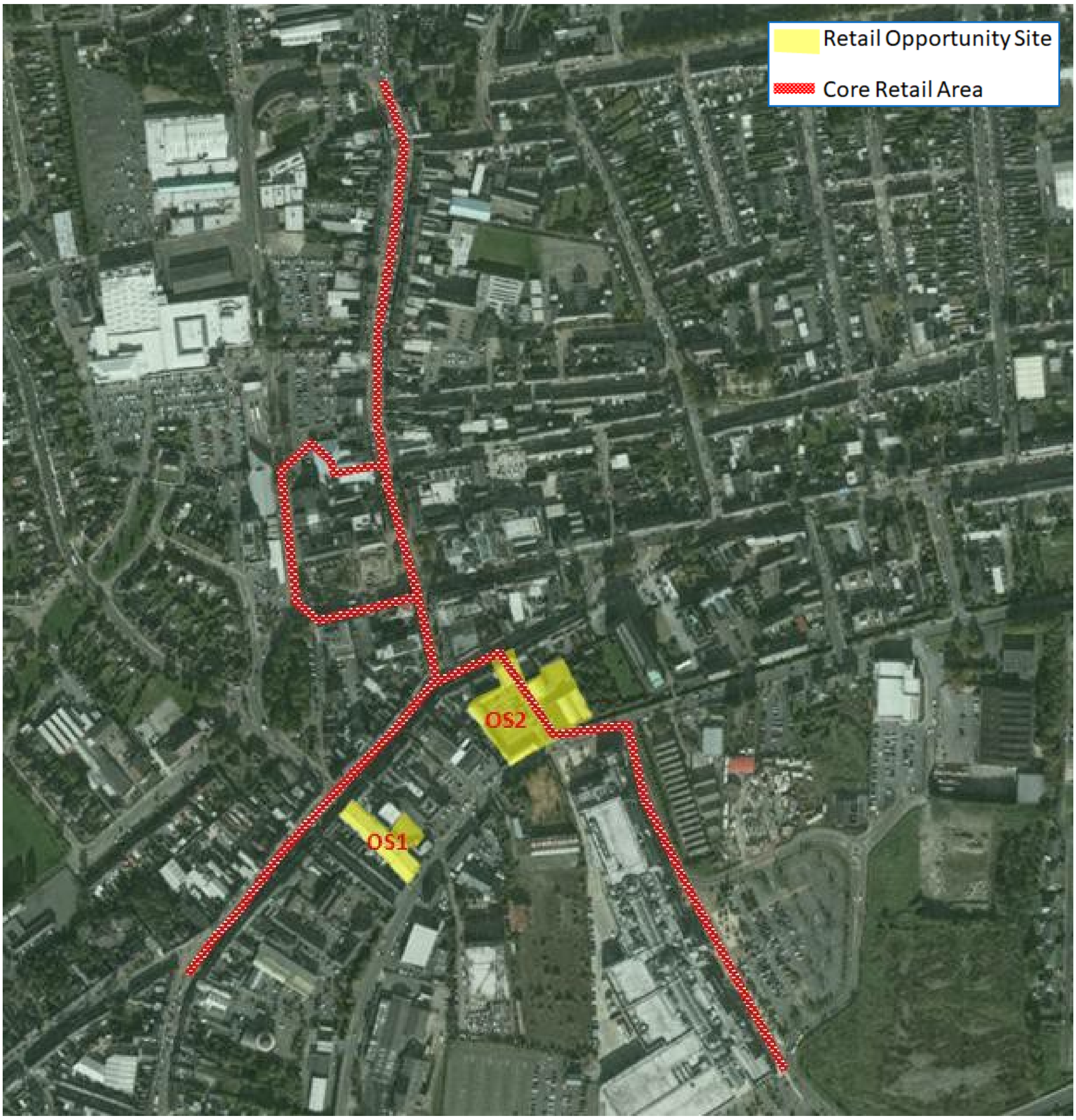
This building is situated at the junction of Duke Street and West Street. The ground floor retail unit represents a prominent fixture on West Street and is located adjacent to St. Peters Cathedral, a key visitor attraction for Drogheda. The building has been previously occupied by a financial institution and a discount store. The reoccupation of the site would enhance the streetscape and contribute to higher levels of footfall in the core shopping area.

Figure 6.0 – Opportunity Site 2, Drogheda

1.6.2.2 Dundalk

The core shopping area of Dundalk stretches from the northern end of Clanbrassil Street to the Marshes Shopping Centre. The principal shopping streets include Clanbrassil Street, Earl Street, Park Street and Market Square. The core shopping area and retail opportunity sites for Dundalk are outlined in Figure 7.0.

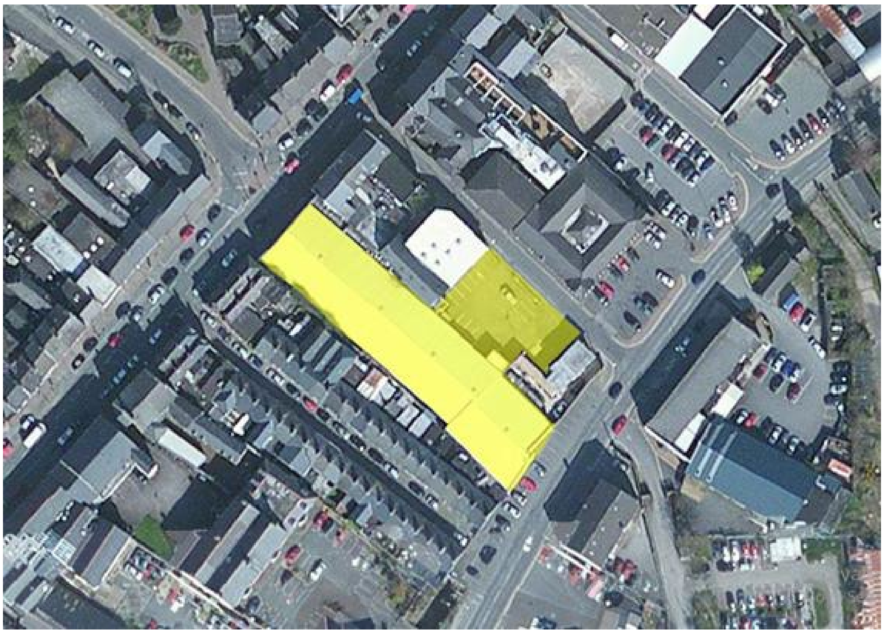
Figure 7.0 – Dundalk Core Shopping Areas and Opportunity Sites



Opportunity Site 1 (OS1); Former Dunnes Stores premises, Park Street

The former Dunnes stores premise occupies a highly prominent and extensive retail façade along Park Street. Dunnes Stores traded from the premises from the late 1960's up to 2009. The premises have remained vacant since the closure of the store and this has contributed to a reduction in footfall and vibrancy along Park Street. The building also accesses onto River Lane and the rear of the premises backs onto the Ramparts. The site provides an opportunity to reinvigorate this area of Park Street and provides a further opportunity to improve linkages to River Lane and the Ramparts.

Figure 8.0 – Opportunity Site 1, Dundalk



Opportunity Site 2 (OS2); Williamsons Mall

This site boasts a double frontage onto Francis Street to the north and onto the Ramparts to the South, via 'Williamsons Mall'. The site is used for surface car-parking and is enclosed by buildings which are primarily commercial/retail in nature. The site extends to approximately 0.648 hectares. The site provides an opportunity to improve linkages and legibility between the traditional town centre area and the Marshes Shopping Centre.

Figure 9.0 – Opportunity Site 2, Dundalk

1.6.2.3 Ardee

The core shopping area of Ardee is primarily linear in form and includes Irish Street, Market Street, Castle Street and Bridge Street. The area also extends westwards along Ash Walk. The core shopping area and retail opportunity sites for Ardee are outlined in Figure 10.0.

Figure 10.0 – Ardee Core Shopping Areas and Opportunity Sites

Opportunity Site 1 (OS1); Site at Ash Walk and Jervis Street

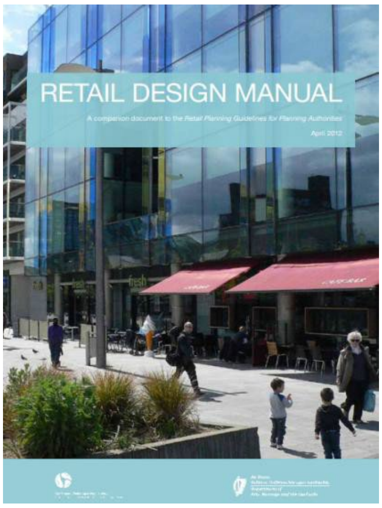
This site incorporates the former Kerr's Builders Providers premises to the south. The former Kerr's Builders Providers site includes a number of warehouse building and yard and has been vacant since 2014. The development of the site provides an opportunity to enhance the streetscape of both Ash Walk and Jervis Street. The total area of the site is approximately 0.6 hectares.

Opportunity Site 2 (OS2); Former Supervalu building, Market Street

The former Supervalu building fronts directly onto Market Street and its current vacant state detracts from the streetscape. The site extends westwards to the existing Supervalu development along Ash Walk. The site provides an opportunity to reinvigorate Market Street and improve the retail offering within the core shopping area.

Figure 11.0 – Opportunity Site 1 and Site 2, Ardee

1.6.3 Retail Objectives and Policies



Having regard to the information presented in relation to the health check analysis of the main urban settlements of County Louth and the additional floorspace requirements of the County up to 2030, a series of retail objectives and policies have been devised.

1.6.3.1 Retail Objectives

The primary purpose of these objectives is to inform retail policies which will protect and reinforce existing retail offering and look to develop appropriate additional retail services, in keeping with the role of the settlements of Louth as prescribed within the Louth Core Strategy and the Regional Spatial and Economic Strategy for the Eastern and Midland Region.

- To sustain and improve the retail profile and competitiveness of Drogheda and Dundalk in their capacity as Regional Growth Centre's;
- To ensure that the retail needs of the residents of County Louth are catered for as much as possible within the area, to enable a reduction in the requirement to travel to meet these needs and accessibility to shopping and services across all sectors of the community.
- To ensure the orderly development of future retail developments within County Louth, to keep the Retail Strategy under review having regard to changes in the retail sector and have regard to any such review in determining applications for retail development;
- Maintain, and where possible, enhance the existing competitiveness of the County's main centres by facilitating the development of additional retail floorspace in keeping with the analysis within Section 1.5;
- Facilitate the development of key opportunity sites (as identified is Section 1.6.2) in all existing retail centres;
- To encourage and facilitate the re-use and regeneration of derelict land and vacant buildings for retail uses, with due cognisance to the Sequential Approach;
- Promote complementary non-retail uses in town centre areas where sustained levels of vacancy is evident,
- Encourage infill retail developments and the redevelopment of derelict and obsolete sites in all existing Core Retail Areas;
- Promote ongoing environmental, amenity and recreation improvements to the public realm in all existing Core Retail Areas;
- Engage with the relevant stakeholders to ensure that the environmental attractiveness of town/local centres is enhanced;
- Encourage a healthy diversity of retail types and scales, as well as uses that are complementary to retail, in particular leisure uses, within all Core Retail Areas;
- Continue to promote street activities such as festivals, street markets and farmer's markets in all existing retail centres;
- Continue to support the Dundalk BIDS Scheme and the progression of existing retail business in Core Retail Areas to establish an online sales arm;

- To align, as far as practicable, new retail development with existing and proposed public transport infrastructure and services and encourage access by foot and bicycle to reduce the dominance of access by private car;
  - Improve the accessibility of town centres by encouraging a pedestrian and cyclist friendly environment.

1.6.3.2 Retail Policies

Having regard to the objectives which have been outlined above, the following retail policies have been produced. In formulating and adhering to these policies, Louth County Council will seek to ensure that any future retail developments are carried out in accordance with the requirements of the Retail Planning Guidelines 2012.

It is the policy of Louth County Council:

- To implement the Louth County Retail Strategy 2021-2027;
- To adopt the Retail Hierarchy contained in Table 18.0 of this Retail Strategy;
- It will be Council policy to require a Retail Impact Assessment to be carried out for development proposals in the following general circumstances:
  - Proposals featuring greater than 1,000 sq.m of net floorspace for both convenience and comparison type developments in Level 1 towns;
  - Proposals featuring greater than 500 sq.m of net retail floorspace for both convenience and comparison type developments in all other settlements.
- To support applications for retail development which are in line with the Retail Hierarchy and accord with the scale and type of retailing identified for that location in accordance with Section 1.5 (Quantitative Analysis);
- To recognise the growth centres of Drogheda and Dundalk as the principle locations for future retail development particularly for middle to high order comparison goods;
- Support shall be provided to planning applications which will maintain and enhance the supremacy of the core shopping areas as identified in Section 1.6.2 of this Retail Strategy, subject to compliance with the criteria for proper planning and sustainable development;
- Support shall be provided for appropriate retail developments on Opportunity Sites identified in Section 1.6.2 of this Retail Strategy, subject to compliance with the criteria for proper planning and sustainable development;
- Support shall be provided to planning applications which propose complementary non-retail uses in town centre areas where sustained levels of vacancy are evident;
- To adhere to the Sequential Approach principle in the consideration of retail applications located outside of core retail areas;
- To require a high quality of design and finish for new and replacement shopfronts, signage and advertising;
- To encourage the reuse and redevelopment of existing retail warehouse units within retail parks for the sale of bulky comparison goods only;
- To create town centres which are accessible by sustainable transport modes including walking, cycling and public transport;
- To ensure that a number of local centres be provided to meet the basic convenience and lower order comparison requirements of any expanding communities;
- To encourage and support the reuse and revitalisation of vacant (and derelict) shops and properties within the town and village centres;

- To promote the Retail Design Manual 2012 and ensure that the identified Key Principles of Urban Design are an integral part of any application for retail development;
- To have regard to the policies and objectives of the Regional Spatial and Economic Strategy for the Eastern and Midland Regional Authority.

1.6.4 Criteria for Assessment of Retail Development

In accordance with the Retail Planning Guidelines 2012, the aim of this section is to provide policy recommendations regarding the assessment of future planning applications for retail development.

1.6.4.1 The Sequential Test

All applications for retail developments at edge-of-centre or out-of-centre locations will be subject to the sequential test, where the following applies:

The Retail Planning Guidelines 2012 state "*that 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. 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 district centre that are (a) suitable (b) available and (c) viable, can that edge-of-centre site be considered. 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*".

The Guidelines also note:

"*The application of the sequential approach requires flexibility and realism on the part of both retail developers and planning authorities, to ensure that the various forms of retailing are developed in the most appropriate locations*."

All applications for retail developments should be subject to the sequential test. The criteria noted above must be considered in the assessment of such sites. Consideration should be given to existing vacant properties and extant permissions when preparing the sequential test. The planning authority should also have regard to the format and scale of the retail development proposed when applying the sequential test approach.

Other criteria that should be considered in the assessment of significant retail applications include:

- That there is a quantitative and qualitative need for the development;
- The contribution of the development towards the improvement of the town centre in terms of urban design and reference to the Retail Design Manual 2012;
- The contribution of the development towards site or area regeneration;
- The role of the development in improving the competiveness of the town against other competing centres;

- Compliance with the County Development Plan and/or Local Area Plan policies and objectives;
- The development is easily accessible by the elderly and less-abled persons/those with impaired mobility;
- The contribution of the development towards achieving sustainable travel patterns.

1.6.4.2 Retail Impact Assessment

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. These assessments will be prepared in accordance with the current Retail Planning Guidelines 2012, 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/district centres as established in the retail study/development plan and not materially diminish the prospect of attracting private sector investment into one or more town centres;
- Have 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 an urban centre can support;
- Cause an adverse impact on one or more city/town/district centres, either singularly 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 city/town/district 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, private car so that the proposal is easily accessible by all sections of society;
- Link effectively with an existing city/town/district centre so that there is likely to be commercial synergy.

1.6.4.3 Traffic and Transport Assessment

As noted by the Retail Planning Guidelines 2012, impacts on the transport networks serving a proposed retail development proposal are very important to determine in the course of considering planning applications.

A Traffic and Transport Assessment (TTA) may be required for retail developments over a particular threshold (1,000 sq.m.), as set out in the Traffic Management Guidelines 2003, and the Traffic Transport Assessment Guidelines 2007.

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, a TTA is important in demonstrating how to encourage a shift towards sustainable travel modes by those using the retail development in question.

1.6.5 Criteria for Assessing Particular Types of Development

1.6.5.1 Large Convenience Stores

The Retail Planning Guidelines 2012 set a 3,000 sq.m. retail floor space cap on food store development outside of Dublin, Cork, Limerick/Shannon, Galway and Waterford city. This strategy absorbs this requirement, which applies to new stores as well as to extensions to existing retail premises. The criteria for assessing larger convenience stores as set out in Retail Planning Guidelines 2012 will be followed by Louth County Council. For example, this includes the use of the sequential approach to find the most preferable sites for large convenience stores.

1.6.5.2 Retail Parks and Retail Warehouses

A Retail Park is defined within the Retail Planning Guidelines 2012 as "an agglomeration of retail warehouses grouped around a common car park selling mainly bulky household goods, requiring extensive areas of showroom space, often with minimal storage requirements". There is an expectation that most of the goods purchased can be transported off-site by the customer. Criteria for assessing retail warehouse applications include scale and design of the development, appropriate vehicular access and the quantitative need for such development.

It is noted in the Retail Planning Guidelines 2012 that that there should be, in general, a presumption against further development of out-of-town retail parks. Any application for further development should be considered carefully in the context of the existing level of provision. There should also be a presumption against the development of bulky household floorspace in industrial/business parks. Applications for change of use of existing light industrial/business park units to retail warehouse use should be discouraged by the council and such development directed to appropriate designated areas.

The development of convenience and comparison floorspace at these locations can potentially impact on the overall vitality and viability of core retail areas. The range of goods sold in existing or planned parks should be restricted to bulky goods as defined in Annex 1 of the Retail Planning Guidelines 2012.

As noted in the Guidelines, it is acceptable that up to 20% of such units be used for the sale of ancillary products associated with an otherwise bulky good. Such space is to be clearly delineated on planning application drawings. Individual retail units should not be less than 700 sq.m and not more than 6,000 sq.m. (including any ancillary garden centre) in size.

1.6.5.3 Local Shops

Local shops serving residential districts perform an important function in urban areas and contribute to a reduction in the need for travel out of a given area.

Where appropriate, local shops shall be recognised in the relevant parts of the Development Plan with ample provision for the establishment of other neighbourhood shops and services and made in the zoning of additional land for residential development, where necessary.

1.6.5.4 Retailing in Rural Areas

Retailing in rural areas should generally be directed to existing settlements. However there maybe exceptional circumstances such as a retail unit which is ancillary to a rural enterprise, a tourist or recreational facilities, a craft workshop and / or a small scale retail unit designed to serve a dispersed rural community.

1.6.5.5 Petrol Filling Stations

The size of the shop associated with any petrol filling station should take account of the fact that large shops have the ability to attract increased traffic volumes and the preferred location for retailing is in town centres. The Retail Planning Guidelines 2012 state that when the size of such retail units is in excess of 100 sq.m the sequential approach should apply.

1.6.6 Monitoring & Review

The Retail Planning Guidelines 2012 advise planning authorities to regularly monitor trends in their areas and update retail policies as appropriate. This Strategy shall be reviewed in parallel with any emerging policy documents at local, national or regional level. This will enable monitoring of the progress made in the delivery of the Retail Strategy.

Appendix 4
Louth Retail Strategy

APPENDIX 1

Retail Strategy Quantitative Analysis

NOTE: This quantitative analysis was carried out as part of the Dundalk Local Area Plan 2025-2031 and was incorporated into the IALUE as part of Variation 3 to the County Development Plan 2021-2027.

1. Introduction

This Appendix provides a quantitative analysis of the estimated amount of retail floorspace required in Dundalk for the period 2024-2031. This quantitative analysis is based on expenditure patterns, future growth projections, consumer spending and turnover potential. The estimates of future requirements for retail floor space provided by this strategy are only intended to provide broad guidance as to the additional quantum of convenience and comparison goods floor space provision. The reason for this is so healthy levels of trading can be sustained and should not be treated in an overly prescriptive manner, nor should they serve to inhibit competition - as per the requirements of the Retail Planning Guidelines 2012.

The following methodology has been used to inform the future retail floor space requirements:

- Estimate of population at base and design year;
- Estimate of expenditure per capita on convenience, comparison and bulky household goods at the base and design year;
- Compile a projection of the total available expenditure in the base year and design year for residents of County Louth to allow for assumed expenditure inflows and outflows;
- Estimates of likely increase in future expenditure available for the provision of additional floorspace;
- Estimates of the likely average turnover of new floorspace for convenience, comparison and bulky household;
- Estimate the amount of vacant retail floorspace; and
- Estimate the capacity of additional floorspace in County Louth.

1.1 Population

The assessment of future floorspace requirements requires projected population growth over the plan period. The population projections are also consistent with those used throughout the Louth County Development Plan 2021-2027 (as varied) and the draft Dundalk Local Area Plan 2024-2030.

Table 1: Dundalk Population Projections

	2016[1]	2022[2]	2029	2030	2031
Population	39,004	43,112	46,664	49,166	50,000

* CSO Census 2016

1.2 Retail Expenditure Estimates

Expenditure per capita is calculated based on the data contained within the CSO's Annual Services Inquiry (ASI). The ASI is listed as the preferred source for expenditure per capita in the Roger Tym and Partners and Jonathan Blackwell and Associates Report on the Retail Planning Guidelines 2012.

The ASI, also now known as the Structural Business Statistics Release provides grossed estimates of the principal trading aggregates for all enterprises in the retail sectors. The relevant turnover aggregates as related to sectors specifically classed as either convenience, comparison or bulky goods sales are selected.

[1] CSO Census 2016
[2] CSO Census 2022

The 2021 national expenditure per capita figure for convenience goods is estimated at €4,226 and for comparison goods is estimated at €5,441. This is calculated by dividing the total national expenditure on convenience and comparison goods (as per ASI 2021) by the population of Ireland in 2021. An adjustment is made for County Louth to relate these national figures to local level. CSO publication County Incomes and Regional GDP (published 2021) indicates that the County Louth expenditure figures were approximately 1.023% of the national average in 2021. The expenditure figures are amended accordingly to more accurately reflect retail spend at a local level.

Expenditure growth rates on comparison goods have traditionally been significantly higher than expenditure growth rates on convenience goods. This is because most household's requirement in respect of convenience products have been largely satisfied and most surplus or discretionary spend has gone into products such as clothing, footwear, household goods, electrical goods, home furnishings etc. Growth rates for comparison expenditure are inclined to increase substantially within a strong national economy. However, for the purposes of this assessment more conservative annual growth rates have been assumed for expenditure per capita. Adjustments of 1% growth per annum for convenience expenditure and 2.5% for comparison expenditure are made in line with recorded economic growth statistics and forecasted levels of growth. The growth rates take cognisance of the CSO Retail Sales Index, the ESRI Quarterly Economic Commentary and the ESRI Ireland's Economic Outlook.

Table 2: Projected Per Capita Spend (€)

Year	Convenience	Comparison
2021	€4,323	€5,566
2022	€4,366	€5,705
2024	€4,454	€5,994
2027	€4,589	€6,454
2030	€4,727	€6,950
2031	€4,774	€7,123

1.3 Total Available Expenditure

Total available expenditure within County Louth is calculated by multiplying the population of the County by the expenditure per capita for each retail category, for each year. This is set out in Table 3.

For the purpose of this retail strategy, it is necessary to differentiate between comparison non-bulky goods and bulky household goods.

Considerably different levels of turnover will apply to comparison goods such as clothing and footwear and smaller household durables than would apply to bulky household goods, typically sold in retail warehouse parks. Therefore, having regard to the CSO Household Budget Survey and market research estimates, an 80:20 split is applied to the total available comparison spend.

Table 3: Total Available Spend (€)

Year	Expenditure / Capita		Population Projections	Total Available Expenditure	
	Convenience	Comparison		Convenience	Comparison
2022	€4,366	€5,705	43,112	€188,226,992	€245, 953,960
2024	€4,454	€5,994	44,533	€198,349,982	€266,930,802
2030	€4,727	€6,950	49,166	€232,407,682	€341,703,700
2031	€4,774	€7,123	50,000	€238,700,000	€356,150,000

1.4 Adjusted Expenditure

The total comparison expenditure is further divided taking into account expenditure on bulky goods, this is at a ratio of 80/20, see Table 4 for details.

Table 5 illustrates the adjusted retail spend for County Louth from 2022- 2031. Given the limited changes in the retail landscape and that no new large scale retail development developments have come on stream within the County or wider region, the inflow and outflow rates were based on the 2014 data. However, the popularity of online shopping has increased since and as such a growth rate of 1% per annum for convenience expenditure and 2% per annum for comparison (bulky and non-bulky) expenditure, has been applied. This increases the projected outflow rates by 2031 to 3.3% for convenience spend, 9.9% for comparison (non-bulky) spend and 11.5% for bulky comparison spend.

Table 4 – Comparison and Comparison Bulky

	Total Comparison	Comparison (80%)	Comparison Bulky (20%)
2022	€245, 953,960	€196,763,168	€49,190,792
2024	€266,930,802	€213,544,641	€53,386,160
20 30	€341,703,700,	€273,362,960	€68,340,740
2031	€356,150,000	€284,920,000	€71,230,000

Table 5: Adjusted Retail Spend

	Convenience Total Available Spend	Convenience Outflow (%)	Convenience Inflow (%)	Adjusted Convenience Total Available Spend
2022	€188,226,992	3	3.8	€189,518,229
2024	€198,349,982	3	3.8	€199,710,662
2030	€232,407,682	3.3	3.8	€233,278,281
2031	€238,700,000	3.3	3.8	€239,594,170

	Comparison Total Available Spend	Comparison Outflow (%)	Comparison Inflow (%)	Adjusted Comparison Total Available Spend
2022	€196,763168	8.4	8	€194,653,866
2024	€213,544,641	8.7	8	€210,563,557
2030	€273,362,960	9.7	8	€266,594,493
2031	€284,920,000	9.9	8	€277,249,953

	Comparison Bulky Total Available Spend	Comparison Bulky Outflow (%)	Comparison Bulky Inflow (%)	Adjusted Comparison Bulky Total Available Spend
2022	€49,190,792	9.8	1	€44,813,795
2024	€53,386,160	10	1	€48,528,019
2030	€68,340,740	11.3	1	€61,224,418
2031	€71,230,000	11.5	1	€63,668,936

1.5 Existing Retail Floorspace

A survey of existing retail floorspace in Dundalk was conducted in January 2024. The survey provides a breakdown of the total net retail floorspace trading and vacant floorspace within Dundalk. The amount of vacant comparison floorspace has been reduced by 10% (8,461m²), reflective of the Council's regeneration policies which encourages mixed uses in the town including residential, cafes restaurants and various businesses which contribute to the vitality and viability of Dundalk. A summary of the results are shown in Table 6.

Table 6: Existing Retail and Vacant Floorspace Dundalk

January 2024	Trading	Vacant	Adjusted Vacant Floorspace
Convenience	24,351m²	1,363m²	1,363m²
Comparison	39,734m²	9,401m²	8,461m²
Comparison Bulky	30,679m²	2,850m²	2,850m²
TOTAL	94,764m²	13,614m²	12,674m²

1.6 Turnover of Existing Floorspace

The indicative turnover ratio of the existing floor space in Dundalk is calculated by dividing the available resident expenditure in 2024 by the existing floorspace in each category. The indicative turnover figures are an estimate of the amount of expenditure that is currently being sustained by the amount of floor space in Dundalk.

Table 7: Indicative Turnover per m2 2024

Type of Goods	Total Available expenditure taking into account Outflow and Inflow levels (€)	Total Net Floor Area (m^2)	Indicative Turnover Per m^2 (€)
Convenience	€199,710,662	24,351m^2	€8,201
Comparison	€210,563,557	39,734m^2	€5,299
Bulky Household Goods	€48,528,019	30,679m^2	€1,582

Table 7 shows the indicative turnover ratio per square metre for retail floorspace within Dundalk. Stores located in newer shopping centres or in prime town centre locations are likely to have a greater turnover than those located in diminishing shopping centres or streets. It should also be noted that multi-national retailers or chains would expect to trade at a much higher intensity than independent retailers. The figures in Table 9 represent an average turnover across all retail formats.

The residual surplus for additional retail floorspace within the County is obtained by subtracting the total available expenditure of existing floor space for convenience, comparison and comparison bulky goods set out in Tables 3 and 4 by the total available expenditure for convenience, comparison and comparison bulky goods taking into account outflow and Inflow levels as set out in Table 5. This residual surplus is set out in Table 8 below.

Table 8: Total Available Expenditure

Year	Total Available expenditure taking into account Outflow and Inflow levels (€)	Total available expenditure of existing Floor space (€)	Residual Surplus (€)
Convenience			
2024	€199,710,662	€198,349,982	€1,360,680
2030	€233,278,281	€198,349,982	€34,928,299
2031	€239,594,170	€198,349,982	€41,244,188
Comparison			
2024	€210,563,557	€213,544,641	-€2,981,084
2030	€266,594,493	€213,544,641	€53,049,852
2031	€277,249,953	€213,544,641	€63,705,312
Bulky Household Goods			
2024	€48,528,019	€53,386,161	-€4,858,142
2030	€61,224,418	€53,386,161	€7,838,257
2031	€63,668,936	€53,386,161	€10,282,775

1.7 Floorspace Capacity

To allow for future efficiency gains by retailers and in consideration of the economic forecasts, it is reasonable to assume a 1% increase per annum for turnover across all three retail categories. The turnover rates for each of the respective years are shown in Table 9.

Table 9: Turnover Rates

Year	Convenience - Indicative Turnover Per m^2 (€)	Comparison - Indicative Turnover Per m^2 (€)	Bulky Comparison - Indicative Turnover Per m^2 (€)
2024	€8,201	€5,299	€1,582
2030	€8,705	€5,625	€1,679
2031	€8,792	€5,681	€1,696

In order to calculate the requirements for additional retail floorspace within the County, the residual surplus as set out in Table 8 is divided by the turnover per m^2 of future retail floorspace as set out in Table 9.

Table 10: Floorspace Potential

Year	Residual Surplus (€)	Turnover Ratio (€)	Additional Floorspace Potential m^2
Convenience			
2024	€1,360,680	€8,201	$166m^2$
2030	€34,928,299	€8,705	$4{,}012m^2$
2031	€41,244,188	€8,792	$4{,}691m^2$
Comparison			
2024	-€2,981,084	€5,299	$563m^2$
2030	€53,049,852	€5,625	$9{,}431m^2$
2031	€63,705,312	€5,681	$11{,}213m^2$
Bulky Household Goods			
2024	-€4,858,142	€1,582	$3{,}071m^2$
2030	€7,838,257	€1,679	$4{,}668m^2$
2031	€10,282,775	€1,696	$6{,}063m^2$

When calculating the amount of additional floor space required for convenience, comparison, and bulky goods it is also necessary to deduct the amount of existing vacant floor space as detailed in Table 6 from the overall requirement. The floorspace potential of Dundalk is set out in Table 11.

Table 11: Indicative Floorspace Potential 2030

Year	Additional Floorspace Potential m^2 - 2030	Vacant Floorspace m^2 - 2024	Indicative Floorspace Potential m^2 - 2030
Convenience	4,012m^2	1,363m^2	2,649m^2
Comparison	9,431m^2	8,461m^2	970m^2
Bulky Comparison	4,668m^2	2,850m^2	1,818m^2

1.8 Conclusion

Table 11 sets out the indicative potential for additional convenience, comparison and bulky comparison floorspace in Dundalk to 2030, this is in accordance with the retail hierarchy identified in the County Plan and in this LAP and has been proportioned in accordance with the population target of Dundalk for 2030.

In accordance with the Retail Planning Guidelines 2012, the indicative floorspace requirements set out in Table 10 is only intended to provide broad guidance as to the additional quantum of floorspace provision. The quantum of floorspace should not be considered as upper or lower limits, merely as indicative of the scale of new floor space required to meet the needs of existing and future population and expenditure within Dundalk.

Any additional new floorspace proposed could replace some existing, outdated or poorly located retail floorspace. In the event that a planning application is submitted for retail development which does not conform to the scale outlined in this retail strategy the onus is on the applicant to prove to the Planning Authority that the development will not detract from the vitality or viability of Dundalk town centre.