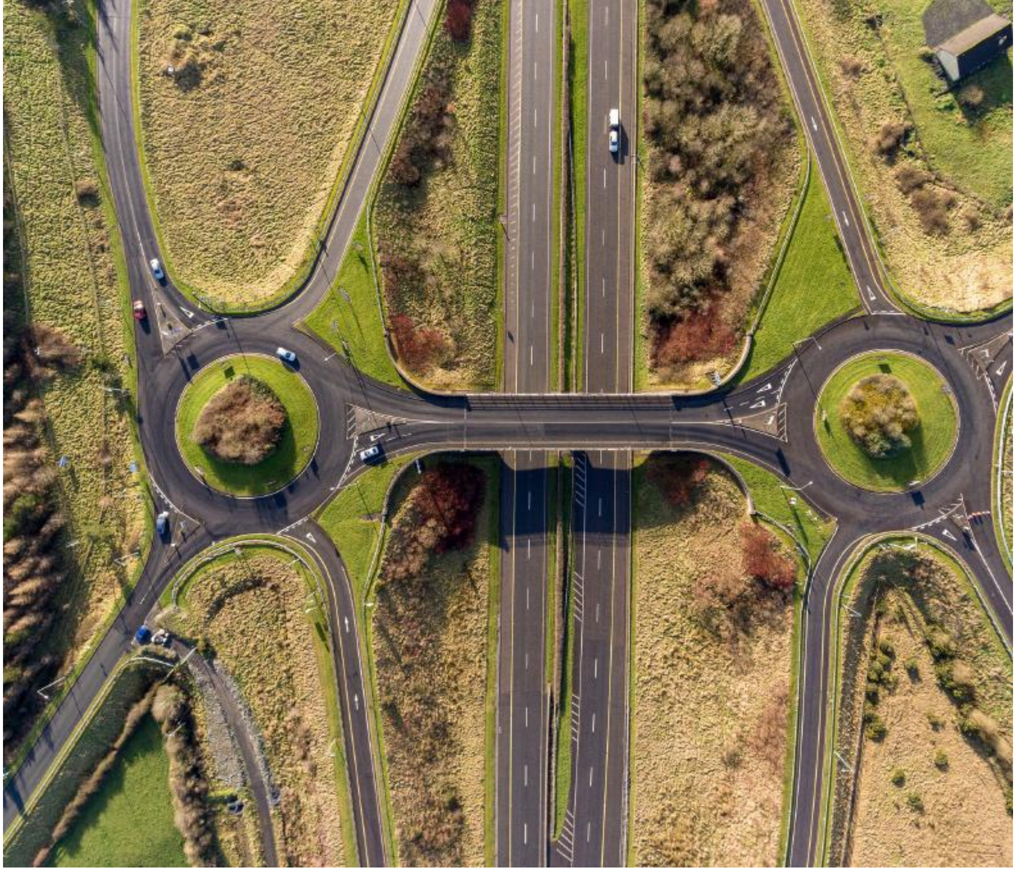

CONSTRUCTION
INFORMATION
SERVICES

Q2 Construction Activity Report

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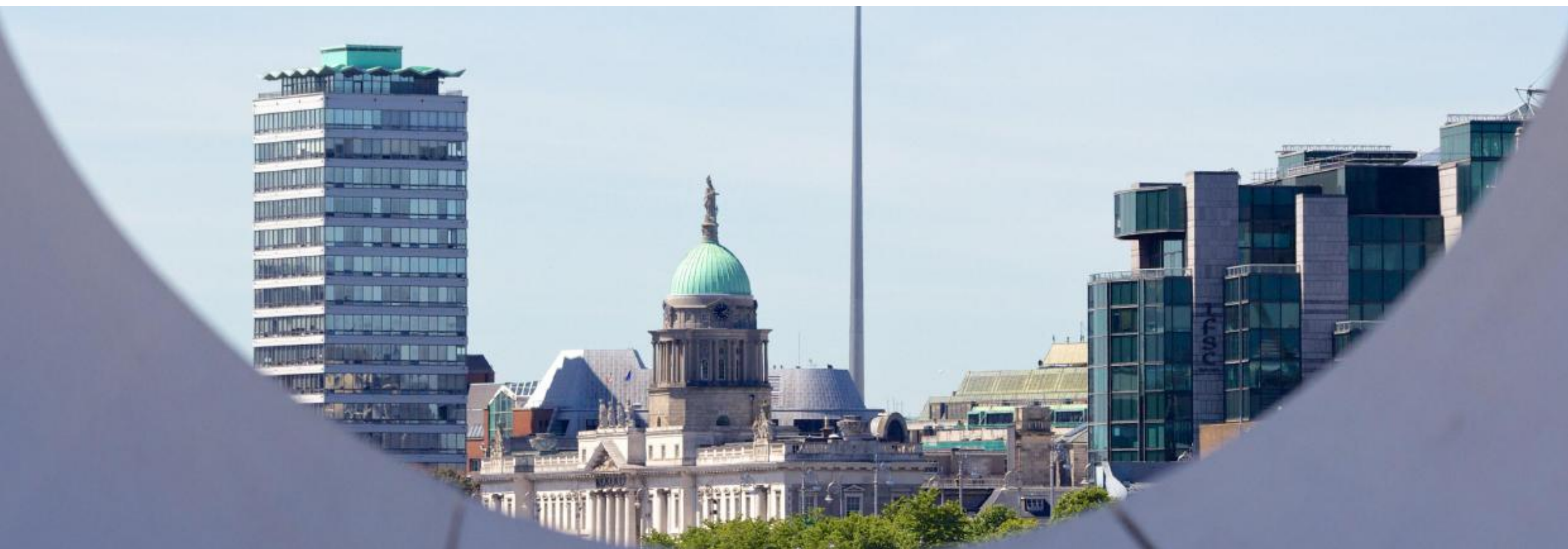


PIPELINE ACTIVITY AND PROJECT STARTS
REPUBLIC OF IRELAND
QUARTER 2 2020

CONSTRUCTION ACTIVITY

Q2 2020

OVERVIEW

This report and the associated analysis online at www.cisireland.com, details the levels of pipeline and active construction over the period covering Quarter 2 2020, which represents the bulk of the construction activity since the onset of the Covid-19 Pandemic in late March.

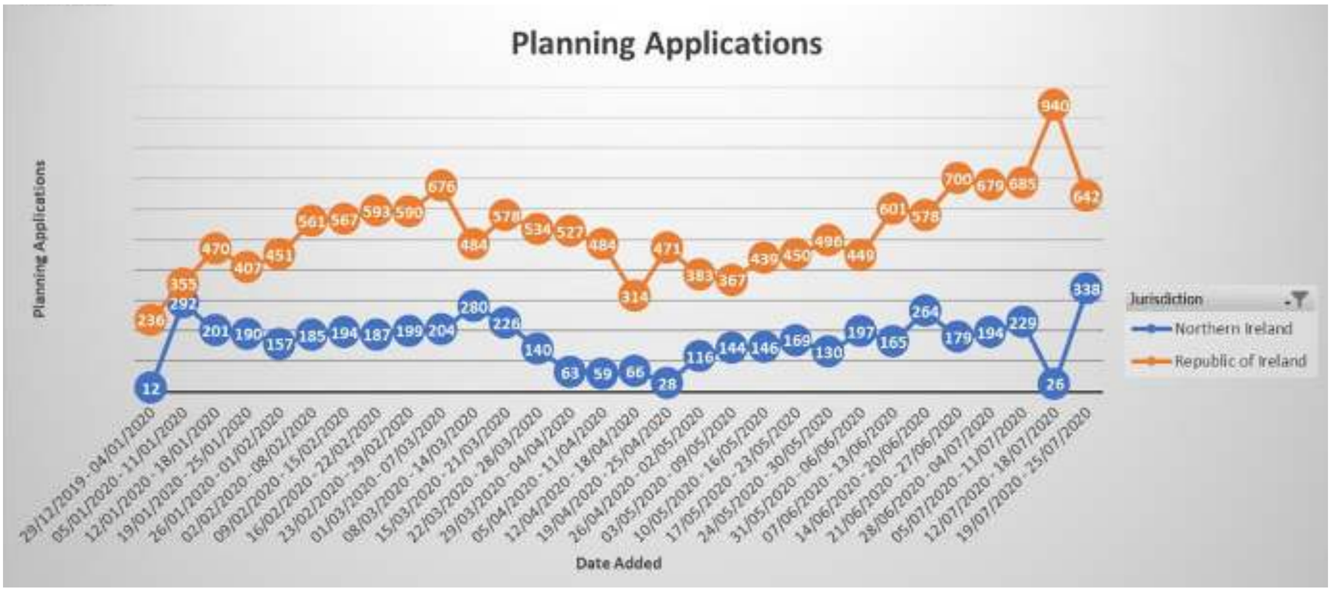
Our recent Covid report in April detailed the impact of the pandemic on active construction sites, with in excess of 1,137 sites (excluding self-build construction) closed following the Government lockdown order. The lifting of restrictions on the 18th May allowing sites which were C-19 compliant to recommence construction activity saw an initial surge in site openings, but this tapered off somewhat in the following weeks, as contractors and workers continue to adapt to new operating processes.

In our Q2 Construction Activity Report overview, I will endeavour to outline the impact of Covid-19 on the Industry, detailing activity for planning applications and decisions and public sector tenders from 1st January 2020 to the 25th July. I will also set out a high-level comparative analysis by sector for both the Republic of Ireland and Northern Ireland.

In the main body of this report I will provide quarter by quarter analysis behind the high-level data below and a full interactive version is available on our website www.cisireland.com.

Planning Activity

The graphs below show the weekly planning applications lodged for both jurisdictions. The average number of ROI applications lodged up to 14th March was 490 per week (pw), during the C-19 lockdown they dropped to 455pw (-7%) and from the 18th May the average has risen to 602pw (+32%). In NI, the drop was more significant with a -42% fall in submissions to 110pw and only reverted to pre-lockdown levels of 189pw from 6th June. It should be noted the return to activity in NI was and remains behind the Republic.



CONSTRUCTION ACTIVITY Q2 2020

Planning decisions for ROI fell by -44% to 228pw during the C-19 lockdown period when compared to the first eleven weeks of the year, when they averaged 410pw. The volume of decisions has recovered by +4% on the pre-Covid period to 426pw, which indicates, based on the volume of planning applications submitted, that a backlog in planning decisions of circa 1,500 are still being worked through. The situation for Northern Ireland reveals a -64% falloff in planning decisions to 55pw during the C-19 cessation and are still -27% behind the pre-Covid period.

In terms of Public Sector Construction Tenders, both ROI and NI witnessed a significant drop in advertised tenders. This resulted in many existing tenders having their deadline dates extended over the lockdown period.

The high-level analysis below is a comparative of Q2 2020 with the corresponding Q2 2019 period and clearly demonstrates a marked decline in activity across all Sectors and Regions for both Pipeline (granted) planning and Project commencements, with the only exception being in the Hospitality sector.

Non-residential: Planning Pipeline Q2 2020 (Plans Granted)

INDUSTRIAL

	Projects	Value Q2 2020	Value Q2 2019	% Change
Eastern & Midland	24	€152m	€224m	-32%
Southern	33	€50m	€69m	-28%
Northern & Western	10	€7m	€19m	-63%
Northern Ireland	35	€19m	€91m	-79%

COMMUNITY & SPORT

	Projects	Value Q2 2020	Value Q2 2019	% Change
Eastern & Midland	23	€52m	€135m	-62%
Southern	32	€8m	€22m	-64%
Northern & Western	7	€2m	€8m	-75%
Northern Ireland	35	€15m	€19m	-21%

HOSPITALITY

	Projects	Value Q2 2020	Value Q2 2019	% Change
Eastern & Midland	[illegible]	€[illegible]m	€[illegible]m	[illegible]%
Southern	[illegible]	€[illegible]m	€[illegible]m	+[illegible]%
Northern & Western	1[illegible]	€[illegible]m	€1[illegible]m	[illegible]%
Northern Ireland	[illegible]	€[illegible]m	€[illegible]m	-[illegible]%

[illegible]

	Republic of Ireland	% Change	Northern Ireland	% Change
Q2 2020	[illegible]	[illegible]%	82	-65%
Q2 2019	[illegible]		135	

EDUCATION

	Projects	Value Q2 2020	Value Q2 2019	% Change
Eastern & Midland	29	€66m	€124m	-47%
Southern	36	€78m	€20m	+290%
Northern & Western	10	€7m	€19m	-63%
Northern Ireland	16	€5m	€15m	-67%

Classrooms

	Republic of Ireland	% Change	Northern Ireland	% Change
Q2 2020	377	-11%	21	-43%
Q2 2019	422		30	

MEDICAL

	Projects	Value Q2 2020	Value Q2 2019	% Change
Eastern & Midland	[illegible]	€58m	€88m	-34%
Southern	[illegible]	€63m	€7m	+800%
Northern & Western	1	€7m	€3[illegible]m	-80%
Northern Ireland	3	€0m	€207m	-207%

Nursing Home [illegible]

	Republic of Ireland	% Change
Q2 2020	748	[illegible]68%
Q2 2019	445	

COMMERCIAL

	Projects	Value Q2 2020	Value Q2 2019	% Change
Eastern & Midland	41	€65m	€287m	-77%
Southern	45	€145m	€77m	+88%
Northern & Western	24	€13m	€80m	-84%
Northern Ireland	65	€111m	€57m	+95%

Residential: Planning Pipeline Q2 2020 (Plans Granted)

Northern & Western

	Projects	Value	Units Q2 2020	Units Q2 2019	Units Q1 2020
	21	**€ 58M**	**363**	**830**	**717**
Housing	18	€ 42M	253	510	665
Apartments	3	€ 16M	110	320	52

Northern Ireland

	Projects	Value	Units Q2 2020	Units Q2 2019	Units Q1 2020
	141	**€ 238M**	**2,386**	**3,317**	**2,760**
Housing	100	€ 164M	1,726	2,723	2,148
Apartments	41	€ 74M	660	594	612

Southern

	Projects	Value	Units Q2 2020	Units Q2 2019	Units Q1 2020
	82	**€ 475M**	**2,224**	**2,196**	**2,084**
Housing	64	€ 437M	1,940	1,768	1,521
Apartments	18	€ 39M	284	428	563

Eastern & Midland

	Projects	Value	Units Q2 2020	Units Q2 2019	Units Q1 2020
	104	**€ 1,059M**	**5,501**	**6,822**	**12,347**
Housing	42	€ 741M	3,590	3,745	8,597
Apartments	62	€ 318M	1,911	3,077	3,750

Non- Residential: Project Starts Q2 2020

INDUSTRIAL

	Projects	Value Q2 2020	Value Q2 2019	% Change
Eastern & Midland	14	€37m	€174m	-79%
Southern	23	€49m	€122m	-60%
Northern & Western	9	€5m	€15m	-67%
Northern Ireland	3	€4m	€65m	-94%

COMMUNITY & SPORT

	Projects	Value Q2 2020	Value Q2 2019	% Change
Eastern & Midland	16	€9m	€9m	0%
Southern	15	€41m	€7m	+486%
Northern & Western	6	€1m	€7m	-86%
Northern Ireland	8	€4m	€6m	-33%

HOSPITALITY

	Projects	Value Q2 2020	Value Q2 2019	% Change
Eastern & Midland	5	€28m	€85m	-67%
Southern	4	€[illegible]m	€[illegible]m	-93%
Northern & Western	4	€1m	€2m	-50%
Northern Ireland		€0m	€4m	

[illegible]

	Republic of Ireland	% Change
Q2 2020	[illegible]8	-77%
Q2 2019	687	

EDUCATION

	Projects	Value Q2 2020	Value Q2 2019	% Change
Eastern & Midland	25	€34m	€45m	-24%
Southern	17	€6m	€63m	-91%
Northern & Western	15	€4m	€21m	-81%
Northern Ireland	1	€17m	€41m	-59%

Classrooms

	Republic of Ireland	% Change	Northern Ireland	% Change
Q2 2020	140	-54%	20	-73%
Q2 2019	304		74	

MEDICAL

	Projects	Value Q2 2020	Value Q2 2019	% Change
Eastern & Midland	[illegible]	€15m	€31m	-52%
Southern	7	€43m	€37m	+16%
Northern & Western	3	€10m	€2m	+400%
Northern Ireland		€0m	€41m	

Nursing Home [illegible]

	Republic of Ireland	% Change
Q2 2020	48	-78%
Q2 2019	218	

COMMERCIAL

	Projects	Value Q2 2020	Value Q2 2019	% Change
Eastern & Midland	39	€118m	€108m	+9%
Southern	22	€61m	€30m	+103%
Northern & Western	8	€16m	€8m	+100%
Northern Ireland	4	€3m	€102m	-97%

Residential: Project Starts Q2 2020

Northern & Western

	Projects	Value	Units Q2 2020	Units Q2 2019	Units Q1 2020
	18	€51M	307	479	350
Apartments	3	€2M	24	30	10
Housing	15	€49M	283	449	340

Northern Ireland

	Projects	Value	Units Q2 2020	Units Q2 2019	Units Q1 2020
	6	€361M	415	2059	965
Apartments	0			330	630
Housing	6	€361M	415	1729	335

Southern

	Projects	Value	Units Q2 2020	Units Q2 2019	Units Q1 2020
	35	€102M	836	1274	814
Apartments	7	€10M	118	116	94
Housing	28	€92M	718	1158	720

Eastern & Midland

	Projects	Value	Units Q2 2020	Units Q2 2019	Units Q1 2020
	48	€850M	4340	3749	4963
Apartments	16	€553M	2679	1715	2665
Housing	32	€297M	1661	2034	2298

CONSTRUCTION ACTIVITY

Q2 2020 Vs Q1 2020

In analysis of the Non-Residential Sectors, Q2 is down -29% for the Planning Pipeline and down -30% for Project Starts compared to Q1 2020. Also, in terms of Residential, the number of units granted permission in Q2 was 8,088 compared to 15,148 in Q1 of this year and for Residential Starts, 5,483 units commenced in Q2 versus 6,127 units in Q1.

Finally, the challenges presented by C-19 have resulted in projects being delayed or cancelled across all sectors, in addition to the disruptions caused in the supply chain relating to materials, labour, equipment, etc. It is difficult to predict what activity levels are likely to be for Q3 and Q4 at this stage, but the trajectory for both applications and decisions do look positive and as the industry adapts to a “new norm” and the promised support from Government, the industry will hopefully bounce back to pre-Covid levels.

Yours,

Tom Moloney

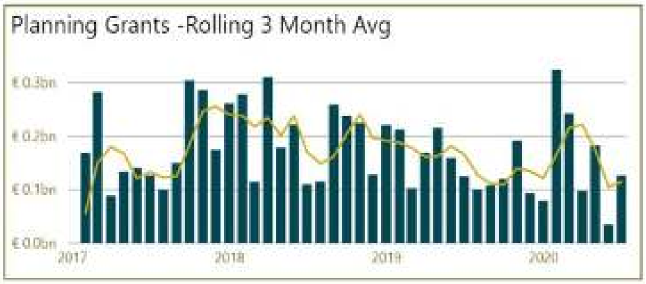
Managing Director, Construction Information Services

COMMERCIAL, RETAIL & HOSPITALITY

PIPELINE

Q2 2020

Projects	Project Value	Floor Area (SqM)
155 -46% (vs Q2 2019)	€ 344.67M -31% (vs Q2 2019)	170.29K -49% (vs Q2 2019)



Planning permission granted in Q2 2020 in the Commercial, Retail and Hospitality Sector declined by 31% in investment terms over the same period last year. The overall number of pipeline projects was 155 representing a fall of 46%. The lowest point was in May with only 16 pipeline projects, recovering to 92 projects in June.

The largest project was the [€120m Trinity Wharf Development in Wexford] granted permission in late April by An Bord Pleanála.

The big mover in this quarter was in the hotel sector where pipeline investment was 227% higher than the same period last year at €108m representing a total of 1,298 additional hotel bedrooms granted planning permission.

REGIONS

EASTERN AND MIDLAND

Projects	Project Value	Floor Area (SqM)
57 -52% (vs Q2 2019)	€ 145.3M -53% (vs Q2 2019)	80.45K -62% (vs Q2 2019)

- 52% fall in project value from Q2 2019
- Breakdown of investment in this region: Dublin (€116m); Mid-East (€21m); Midlands (€8m)
- Largest project: €23.2m - Hotel Development in Dublin 7 (currently under appeal)

SOUTHERN

Projects	Project Value	Floor Area (SqM)
62 -39% (vs Q2 2019)	€ 166.04M +73% (vs Q2 2019)	62.82K -14% (vs Q2 2019)

- Top 5 projects split over five different counties
- Despite 39% fall in pipeline projects, the €120m Trinity Wharf Development in Wexford helps push overall investment up 73% over same period last year
- Neary 400 new hotel bedrooms granted permission

NORTHERN AND WESTERN

Projects	Project Value	Floor Area (SqM)
36 -45% (vs Q2 2019)	€ 33.33M -65% (vs Q2 2019)	27.01K -44% (vs Q2 2019)

- Investment in hotels dominates and accounts for nearly 50% of pipeline
- 70% of pipeline is in Galway and Mayo
- Largest project is €8m - Motel & Conference Facility in Claremorris

COMMERCIAL, RETAIL & HOSPITALITY

STARTS

Q2 2020

Projects	Project Value	Floor Area (SqM)
82 -36% (vs Q2 2019)	€ 223.18M -9% (vs Q2 2019)	110.13K -23% (vs Q2 2019)

Project Starts in Q2 2020 for the Commercial, Retail and Hospitality Sector declined by 36% compared to Q2 2019, but fell by only 9% from the previous quarter.

The largest project started was a new [€63m - Office Development] at the Setanta Centre and Transport House in Dublin with demolition works getting underway in June after being approved after appeal in late May.

Sixty five percent of the starts were in the Dublin region and 27% in the Southern region. Overall investment was down 9% on the same period last year and 33% down from Q1 2020. Office and retail developments dominate. New hotel beds (158) to be created are down 77% from Q2 2019 but showed a 29% rise from Q1 2020.

REGIONS

EASTERN AND MIDLAND

Projects	Project Value	Floor Area (SqM)
44 -31% (vs Q2 2019)	€ 145.29M -25% (vs Q2 2019)	93.07K -8% (vs Q2 2019)

- Dublin continues to dominate this sector accounting for 90% of all new starts by value (€132m)
- The largest project started outside of Dublin was the €3.6m Film Studio at Ardmore Studios on Bray
- Overall investment by floor area fell in this quarter by 8% over Q2 2019 and by 24% over Q1 2020

SOUTHERN

Projects	Project Value	Floor Area (SqM)
26 -41% (vs Q2 2019)	€ 61.43M +41% (vs Q2 2019)	9,981 -70% (vs Q2 2019)

- The number of projects started fell by 41% over Q2 2019 but project values rose by 41% to €61m
- Largest project started was a €50m - Mixed Use Development in Bishops Quay, Limerick
- Two new Lidl supermarket developments in Cork and Wexford amount to over €5.5m in investment

NORTHERN AND WESTERN

Projects	Project Value	Floor Area (SqM)
12 -43% (vs Q2 2019)	€ 16.46M +75% (vs Q2 2019)	7,071 -9% (vs Q2 2019)

- Two large public sector office projects account for almost all of the €16m invested
- Largest project is the €12.5m Advance Office Building for IDA Ireland at IDA Business & Technology Park Finisklin, Sligo designed to provide high quality office accommodation
- Enabling works commenced in June on a €3m - Office Development for the OPW in Headford, Galway

INDUSTRIAL

PIPELINE

Q2 2020

Projects	Project Value	Floor Area (SqM)
67	€ 208.67M	248.82K
-50%	-33%	-25%
(vs Q2 2019)	(vs Q2 2019)	(vs Q2 2019)

The Industrial pipeline of projects fell by 50% from the same period last year and by 40% over the previous quarter.

Plans were approved in June for a [€102m Data Centre in Co. Meath] but despite this, the overall pipeline investment fell by 33% from Q2 2019 to €209m.

Warehousing and Logistics are the second largest sector after Data Centres with plans granted for 26 projects amounting to a total floor area of 82k Sq.M. Pipeline investment in this sector at €61m is also down on Q2 2019 by 33%. Factory and Industrial planning grants accounted for €36m and Laboratory and Research projects for €11m down 60% and 91% respectively from Q2 2019.

REGIONS

EASTERN AND MIDLAND

Projects	Project Value	Floor Area (SqM)
24	€ 152.33M	161.28K
-52%	-32%	-33%
(vs Q2 2019)	(vs Q2 2019)	(vs Q2 2019)

- 60% of all Industrial plans granted by value are in the Eastern and Midland region
- Overall pipeline investment is only slightly down from the previous quarter, but the €102m Data Centre project masks the true decline
- Outside of Meath and Dublin the largest investment was in Louth with plans approved in late May for a €5m - STEM Building for Dundalk Institute of Technology

SOUTHERN

Projects	Project Value	Floor Area (SqM)
33	€ 49.71M	79.37K
-41%	-28%	+19%
(vs Q2 2019)	(vs Q2 2019)	(vs Q2 2019)

- Despite declines in the number of projects and level of investment over Q2 2019, floor area space rose by 19%
- Largest project is €13m - Logistic/Distibution Warehousing Facility in Cork
- Plans granted for projects in Carlow amounted to over €10m - a €5.5m - Warehousing Development in Bagenalstown for Royal Oak Distillery and a €3.7m - Laboratory Building for MSD

NORTHERN AND WESTERN

Projects	Project Value	Floor Area (SqM)
10	€ 6.63M	8,170
-66%	-65%	-63%
(vs Q2 2019)	(vs Q2 2019)	(vs Q2 2019)

- Sharp declines in pipeline investment over Q2 2019
- Largest project was a €2.9m Manufacturing Unit near Ballinasloe for Easyfix Rubber Products Limited
- 85% of investment is in Galway and Mayo

INDUSTRIAL

STARTS

Q2 2020

Forty six Industrial projects started in Q2 2020 representing a 71% fall in investment over Q2 2019 and a 53% fall over Q1 2020.

The largest project started in this sector is the [€18m Data Centre in Dublin 17] for [Clonmont Developments Limited]

Starts in Factory and Light Industrial projects accounted for 57% of investment followed by Warehousing and Logistics (23%) and Data Centres (20%).

Investment in the Southern region was highest at 54% representing €49m followed by the Eastern region (41%) with €37m of investment. Nearly €5m was invested in the Northern and Western region representing just over 5% of overall investment.

REGIONS

EASTERN AND MIDLAND

- Top five projects are split between Dublin, Kildare, Meath and Louth (2)
- New starts down 79% at €37m from Q2 2019 and 76% from Q1 2020
- Data Centres accounted for nearly 50% of new starts by value followed by Factory and Light Industrial projects which amounted to €16m

SOUTHERN

- Starts in Cork (9), Kerry (2) and Clare (3) amount to nearly €43m
- Largest project started was a [€12.9m - Manufacturing Building Extension] for Stryker Ireland Limited at the IDA Business Park in Carrigtwohill
- Project starts fell in value by 59% over Q2 2019, but rose by 81% over Q1 2020

NORTHERN AND WESTERN

- The nine projects started in this region represent a 50% decline over Q2 2019
- The €5m of investment represents a 68% fall from Q2 2019 and a 37% decline from Q1 2020
- Largest project started was a [€3m - Warehouse] for O'Dowd Storage & Warehousing Limited in Co. Sligo which began in late June

EDUCATION

PIPELINE

Q2 2020

Projects	Project Value	Floor Area (SqM)	Classrooms
81	€ 148.67M	90.48K	377
-45%	-7%	-1%	-11%
(vs Q2 2019)	(vs Q2 2019)	(vs Q2 2019)	(vs Q2 2019)

The overall investment pipeline for Education projects fell by 7% in Q2 2020 from Q2 2019 representing an 11% decline in the number of new classrooms. Analysis shows that investment in schools stood at €82m (a 12% fall), however Third Level Education investment rose by 5% to €64m. Projects granted approval rose by 42% over Q1 2020 and the number of classrooms planned increased by 85 over the same period.

The top five projects are spread between Cork, Dublin and Limerick and represent over 77% of all pipeline investment in the quarter.

The largest project approved was the €35m Carrigtwohill School Project.

REGIONS

EASTERN AND MIDLAND

Projects	Project Value	Floor Area (SqM)
29	€ 65.83M	36.87K
-59%	-47%	-47%
(vs Q2 2019)	(vs Q2 2019)	(vs Q2 2019)

- The value of plans granted fell by 47% and the number of classrooms planned by 64%
- Dublin: 13 projects, 36 classrooms; Mid East: 12 projects, 28 classrooms; Midlands: 4 projects, 7 classrooms
- Largest projects, both for UCD, were plans for two academic buildings

SOUTHERN

Projects	Project Value	Floor Area (SqM)
36	€ 78.23M	49.11K
-14%	+290%	+285%
(vs Q2 2019)	(vs Q2 2019)	(vs Q2 2019)

- Plans approved rose 290% over Q2 2019 to €78m representing a 153% increase in new classrooms planned (245 in total)
- Top five projects split between Cork, Limerick (2), Clare and Kerry
- Largest Third Level project approved was the €9.7m - Science College Building for Limerick Institute of Technology

NORTHERN AND WESTERN

Projects	Project Value	Floor Area (SqM)
16	€ 4.6M	4,496
-56%	-70%	-49%
(vs Q2 2019)	(vs Q2 2019)	(vs Q2 2019)

- Pipeline investment fell by 70% over Q2 2019 and by 65% over Q1 2020 to just €4.6m
- Only one project valued over €1m - €2m - Primary School Development for Scoil Naomh Eanna in Loughrea
- 31 new classrooms planned – 12 in border Region and 19 in Western region

EDUCATION

STARTS

Q2 2020

Projects	Project Value	Floor Area (SqM)	Classrooms
57	€ 43.65M	31.12K	140
-23%	-66%	-62%	-54%
(vs Q2 2019)	(vs Q2 2019)	(vs Q2 2019)	(vs Q2 2019)

The number of new classrooms commenced in the quarter equates to 140, which is a 54% fall on Q2 2019 and a 13% fall on Q1 2020. The value of new investment in the Education sector also fell significantly by 66%. This follows a modest 2% rise in the previous quarter.

School projects dominate with €24m invested over 43 projects. The top five projects started are split between Dublin (2), Kildare, Cork and Donegal.

The largest project started was a €17m re-development of The Royal Irish Academy Of Music's historic Westland Row premises. In the school's sector, the largest project started was the €5.3m - School Development for St Joseph's Boys National School in Kilcock, Co. Kildare.

REGIONS

EASTERN AND MIDLAND

Projects	Project Value	Floor Area (SqM)
25	€ 33.84M	20.98K
-17%	-25%	-46%
(vs Q2 2019)	(vs Q2 2019)	(vs Q2 2019)

- Construction on 91 new classrooms commenced, which represents a 38% fall on Q2 2019, but a 16% rise on Q1 2020
- Two thirds of the new classrooms started were in the Mid-East region
- Over €1m invested in 5 creche projects in Dublin (2), Kildare, Laois and Meath

SOUTHERN

Projects	Project Value	Floor Area (SqM)
17	€ 5.48M	5,567
-41%	-91%	-81%
(vs Q2 2019)	(vs Q2 2019)	(vs Q2 2019)

- Hugh declines across the board on new starts from Q2 2019 – Projects: 17 (down 41%); Investment: €5.48m (down 91%); Floor Area: 5.6k sqm (down 81%); Classrooms: 16 (down 86%)
- New starts in classrooms down from 67 to 16 from Q1 2020
- €5.6m investment divided between South West (€3.4m); Mid West (€1m); South East (€1m)

NORTHERN AND WESTERN

Projects	Project Value	Floor Area (SqM)
15	€ 4.32M	4,566
0%	-79%	-65%
(vs Q2 2019)	(vs Q2 2019)	(vs Q2 2019)

- Fifteen project starts represent the same number for Q2 2019 but a 79% fall in investment at €4.32m
- 33 new classrooms is more than double figure for Q1 2020
- Largest project is the €1.2m construction of a new extension and refurbishment at Glenswilly National School
- Border region accounts for €2.9m of investment while West accounts for €1.4m

MEDICAL

PIPELINE

Q2 2020

Projects	Project Value	Floor Area (SqM)
30 -48% (vs Q2 2019)	€ 128.68M -1% (vs Q2 2019)	59.79K +2% (vs Q2 2019)

Hospital Beds	Nursing Home Beds
0 -100% (vs Q2 2019)	748 +68% (vs Q2 2019)

Pipeline investment fell by just 1% but the number of projects almost halved (30). There were no new hospital beds in this quarter's pipeline but a 68% rise in nursing home beds planned (748). The value of plans approved fell by 69% over Q1 2020 and the number of projects more than halved.

Sixty six percent of all plans granted by value came from the Nursing Home sector. In total 1,416 new nursing homes beds have been granted planning permission in the first two quarters.

Three of the top 5 projects this quarter are based in the South West. The largest project approved was the HSE's [€22m construction] of a three storey (approx. 6,657 sq. m) extension to the existing St. Luke's radiation oncology centre.

REGIONS

EASTERN AND MIDLAND

Projects	Project Value	Floor Area (SqM)
13 -57% (vs Q2 2019)	€ 58.2M -34% (vs Q2 2019)	24.31K -39% (vs Q2 2019)

- Pipeline investment split between Dublin (€31m); Mid East (€16m) and Midlands (€11m)
- Planning grants in Nursing Home sector accounts for 52% of all investment followed by the Hospital sector at 43%
- Top project outside Dublin is the €15.7m - Conversion to Nursing Home for Downshire Lodge Nursing Home Ltd in Blessington, Co. Wicklow

SOUTHERN

Projects	Project Value	Floor Area (SqM)
16 +23% (vs Q2 2019)	€ 63.49M +749% (vs Q2 2019)	31.99K +814% (vs Q2 2019)

- Bucking the trend, plans granted in the Southern region have risen by over 7-fold in value
- The sector is dominated by Nursing Home investment which accounts for €56m spread over 16 projects and equating to 459 new beds
- Largest project was the €19.7m - Nursing Unit/Residential Care Unit for the HSE in Killarney

NORTHERN AND WESTERN

Projects	Project Value	Floor Area (SqM)
1 -93% (vs Q2 2019)	€ 7M -80% (vs Q2 2019)	3,483 -77% (vs Q2 2019)

- Only one project granted permission in this sector in Q2 2020 - €7m - Change of Use to Primary Care Centre in north Monaghan for the HSE
- Investment falls by 80% over Q2 2019 and by 73% over Q1 2020

MEDICAL

STARTS

Q2 2020

Projects	Project Value	Floor Area (SqM)
21 -40% (vs Q2 2019)	€ 67.81M -3% (vs Q2 2019)	23.14K -38% (vs Q2 2019)

Hospital Beds	Nursing Home Beds
30 (vs Q2 2019)	48 -78% (vs Q2 2019)

The value of project starts is down 3% from the same period last year and the number of projects fell by 40% to 21. While investment is down slightly on Q1 2020, the number of new nursing homes beds started falls from 447 to 48, which also represents a 78% fall over Q2 2019.

The Southern region accounts for €43m (63%) of all starts spread over 7 projects.

Primary and palliative care centres dominate the top five projects and are spread across five counties – Cork, Tipperary, Kilkenny, Roscommon and Dublin.

The largest project started is a privately funded €20m - Primary Care Centre for Action Health Enterprises GP Limited in Ballincollig , Co. Cork.

REGIONS

EASTERN AND MIDLAND

Projects	Project Value	Floor Area (SqM)
11 -31% (vs Q2 2019)	€ 14.96M -52% (vs Q2 2019)	5,053 -68% (vs Q2 2019)

- 52% fall in value of starts over Q2 2019 and close to 50% fall over Q1 2020
- Top five projects started are split between Dublin (3) and Kildare (2) – largest project is €5m Breast Care Unit at Beaumont Hospital
- Dublin dominates investment with over 66% by value

SOUTHERN

Projects	Project Value	Floor Area (SqM)
7 -42% (vs Q2 2019)	€ 43.26M +16% (vs Q2 2019)	15.04K -26% (vs Q2 2019)

- Medical starts rise by 16% over both Q2 2019 and Q1 2020 to €43m
- South West accounts for just over 50% of new starts (€23m) followed by South East and Mid West which both account for €10m over three projects
- Almost all of the investment is in Healthcare facilities (€41m) with no new projects started in the Care Home sector

NORTHERN AND WESTERN

Projects	Project Value	Floor Area (SqM)
3 -57% (vs Q2 2019)	€ 9.6M +531% (vs Q2 2019)	3,051 +77% (vs Q2 2019)

- Although only 3 projects were started, two were of a significant size to push a five-fold rise in value over Q2 2019 and an over 50% rise over Q1 2020
- Largest project was the €6m - Palliative Care Centre for the Mayo Roscommon Hospice Foundation in Co. Roscommon

RESIDENTIAL

PIPELINE

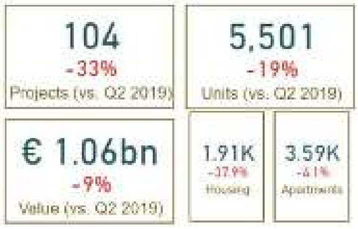
Q2 2020

- Pipeline investment in the residential sector for Q2 2020 showed an 8% decline in value from Q2 2019 and an 18% drop in the units planned
- There is an even split between the number of apartments granted planning (3,984) and the number of traditional housing units (4,104)
- A quarter of all projects are in the Dublin region (52) and they account for 55% of planned investment equating to 4,486 units
- Largest project, granted via strategic planning application by An Bord Pleanála, was a €165m Residential Development in Cork City for 753 housing units (153 of which are apartments)

REGIONS

EASTERN AND MIDLAND

- The pipeline for apartments at 3,590 units outstrips that for traditional housing (1,911)
- Top 5 projects are all in Dublin
- Investment has fallen 9% over Q2 2019 and by nearly two thirds over Q1 2020
- Number of units in the pipeline falls by 19% to 5.5k over Q2 2019 and drops from over 14k which had plans granted in Q1 2020

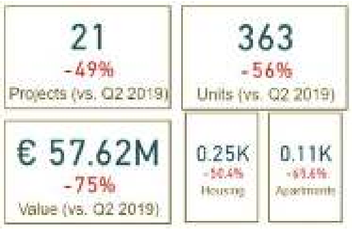


SOUTHERN

- Despite a 21% fall in projects granted approval (82), investment rose by 35% to €475m and the number of units increased by 1% to 2,224
- Pipeline investment rose by 21% over Q1 2020
- Top two projects are in Cork. Largest project outside Cork was a €24.9m - Housing Development in Kilkenny comprising 98 units

NORTHERN AND WESTERN

The Northern and Western region showed declines in activity although the Border region fared better than the Western region in this quarter.

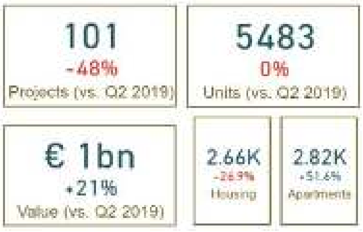


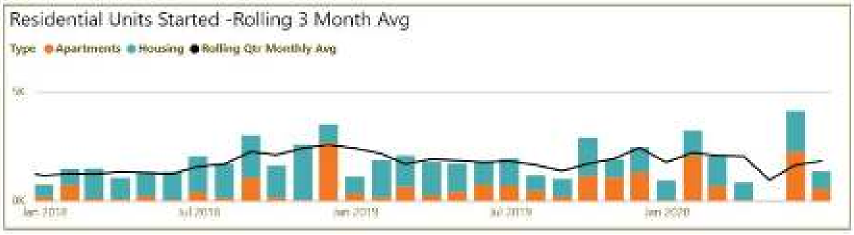
- **Border region:** Compared to Q2 2019 pipeline projects are down 42% to 11 projects; number of units planned (210) is up 6% and investment shows a 12% rise to €32m
- **Western region**: Compared to Q2 2019 pipeline projects are down 55% to 10 projects; number of units planned (153) is down 76%; investment down 87% to €26m

RESIDENTIAL

STARTS

Q2 2020





- 5.5k units started in Q2 2020 which equates to residential starts in Q2 2019 but an 11% drop from Q1 2020
- Developments evenly split between traditional housing (2,662) and apartments (2,821)
- Dublin accounts for over 50% of starts by value (€542m) and 52% of units planned at 2,846 (East and Midland Region accounts for 85%)
- Top five projects split between Dublin (4) and Wicklow
- Two-bedroom apartments and three-bedroom houses continue as most popular type of housing

REGIONS

EASTERN AND MIDLAND

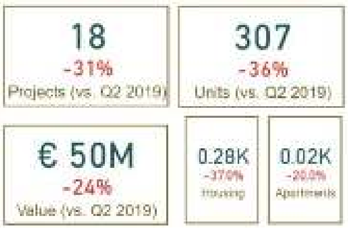
- Despite a 55% fall in projects started (48) over Q2 2019, the number of units increased by 16% and the value of projects started doubled
- Whereas apartment starts dominate in Dublin, traditional housing is highest in the Mid-East region
- Largest project started was the private €120m - Apartment Development in East Road, Dublin 3

SOUTHERN

- 44% fall in number of projects over Q2 2019 and a 20% fall over Q1 2020
- Traditional Housing (718 units); Apartments (118 units)
- Largest project , with 99 units, is a €10m residential development in Limerick started in mid-June

NORTHERN AND WESTERN

- Starts are down 24% on same period last year but up 16% over Q1 2020 although number of units proposed falls from 350 to 307
- Western region accounts for 76% of new starts by value (€38m)
- Just 78 new units started in Border region
- Largest project started was a €14.2m - Residential Development in Athlone for 78 units



METHODOLOGY

METHODOLOGICAL NOTES

- CIS monitor construction activity in Ireland at project level. Our team of researchers track major projects from planning to completion and gather relevant data and metrics. The analysis in this report excludes self-build projects. Whilst we do track all projects, including residential self-builds and extensions, our analysis has shown that projects over €500k/£500k and residential developments of 10 units or more represent, on average, over 90% of total project value with their sectors.
- **Project Values:** Project values are calculated by an in-house CIS cost calculator created with the help of QS and project costing professionals. Projects values are based on shell and core construction costs calculated by using various metrics such as floor area, housing units, road lengths. Factored into the calculations is the type of build and the location of the build
- The figures on starts shown here represent gross figures. Phased developments are not taken into consideration when commenting on project starting
- **"Pipeline"** refers to projects that have been granted planning permission. Dates used are the Planning Decision date as opposed to the Final Grant date
- **"Starts"** refer to projects that began in the period under consideration as confirmed by CIS research team
- **Rolling Three Month Averages** are a standard method of smoothing out spikes measures over time by taking an average of the aggregation of the previous three months
- **Please note all sectors are not covered in this report.** Community and Sport, Agriculture and Civil are detailed in the interactive online report and analysis can be drawn from there

REGIONS USED REPORT

The regional classifications used in the report follow the Eurostat NUTS regions as described below

NUTS2	NUTS3	County
Eastern & Midland	**Dublin**	Co. Dublin
	Mid-East	Co. Kildare
		Co. Louth
		Co. Meath
		Co. Wicklow
	Midlands	Co. Laois
		Co. Longford
		Co. Offaly
		Co. Westmeath
Northern & Western	**Border**	Co. Cavan
		Co. Donegal
		Co. Leitrim
		Co. Monaghan
		Co. Sligo
	West	Co. Galway
		Co. Mayo
		Co. Roscommon
Southern	**Mid-West**	Co. Clare
		Co. Limerick
		Co. Tipperary
	South-East	Co. Carlow
		Co. Kilkenny
		Co. Waterford
		Co. Wexford
	South-West	Co. Cork
		Co. Kerry

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