



Q2 2021

Construction Activity Report

The recovery begins in earnest

INTRODUCTION

Construction pipeline activity in Q2 2021 increased by 48% in terms of planning applications and by 60% in terms of planning grants from Q2 2020. Putting the activity in context of pre-pandemic years there has been a 5% increase in applications and a 30% increase in planning grants over the quarterly average for 2019.

In terms of activity on the ground, the delayed starts from Q1 of this year inflated activity figures for the quarter with project starts up by 450% over Q1 2020 and by 122% over the quarterly average for 2019.

Regional activity has increased significantly in pipeline and active construction activity from last year is up 30% on the quarterly average for 2019.



Republic of
IRELAND

PLANNING APPLICATIONS¹

Q2 2021 Construction Activity Comparison by Sector

Sector	Q2 2021	Q1 2021	% Change	Q2 2020	% Change	2020 AVG	% Change	2019 AVG	% Change
Residential	€ 3,439M	€ 3,039M	13.2% ↑	€ 2,546M	35.1% ↑	€ 3,030M	13.5% ↑	€ 3,078M	11.7% ↑
Non-Residential	€ 1,764M	€ 1,188M	48.5% ↑	€ 1,073M	64.5% ↑	€ 1,488M	18.6% ↑	€ 1,589M	11.0% ↑
Civil	€ 251M	€ 292M	-14.3% ↓	€ 64M	292.7% ↑	€ 227M	10.3% ↑	€ 535M	-53.2% ↓
Total	€ 5,455M	€ 4,519M	20.7% ↑	€ 3,683M	48.1% ↑	€ 4,745M	15.0% ↑	€ 5,203M	4.8% ↑

Q2 2021 Construction Activity Comparison by Region

Region	Q2 2021	Q1 2021	% Change	Q1 2020	% Change	2020 AVG	% Change	2019 AVG	% Change
Eastern & Midland	€ 3,415M	€ 3,229M	5.7% ↑	€ 2,785M	22.6% ↑	€ 3,153M	8.3% ↑	€ 3,225M	5.9% ↑
Southern	€ 1,612M	€ 1,012M	59.3% ↑	€ 593M	171.9% ↑	€ 1,126M	43.2% ↑	€ 1,563M	3.2% ↑
Northern & Western	€ 428M	€ 278M	53.9% ↑	€ 304M	40.6% ↑	€ 466M	-8.3% ↓	€ 415M	3.0% ↑
Total	€ 5,455M	€ 4,519M	20.7% ↑	€ 3,683M	48.1% ↑	€ 4,745M	15.0% ↑	€ 5,203M	4.8% ↑

¹ Excluding Self Build and Student Accommodation applications

Plans Submitted by Volume



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RESIDENTIAL

- The application pipeline for residential developments shows a 35% increase in value over Q2 2020 and a 13% increase over Q1 2021
- 126% increase in the volume of residential units applied for from Q2 2020 in the Southern Region - from 2,183 to 4,925
- Nearly 9k apartment units in the pipeline (approx. 7k in Eastern and Midland region). Near 8k are either one and two bed units.
- Pipeline investment is €3.4b- a 35% rise from Q2 2020

NON-RESIDENTIAL

- Pipeline investment at €1.76b is up 65% over Q2 2020 and 49% over Q1 2021
- All sectors record increased pipeline activity over Q2 2020 with Education, Medical and Industrial sectors show the largest increases
- The number of applications is up 49% from Q2 2020 to 1,365
- Over 1,000 hotel beds are in the pipeline
- There are 839 Nursing home beds across 16 projects
- The largest project this quarter is a [€76m Hotel development](#) proposed for a site adjoining the T2 Multi-Storey Car Park at Dublin Airport

PLANNING GRANTS²

Q2 2021 Construction Activity Comparison by Sector

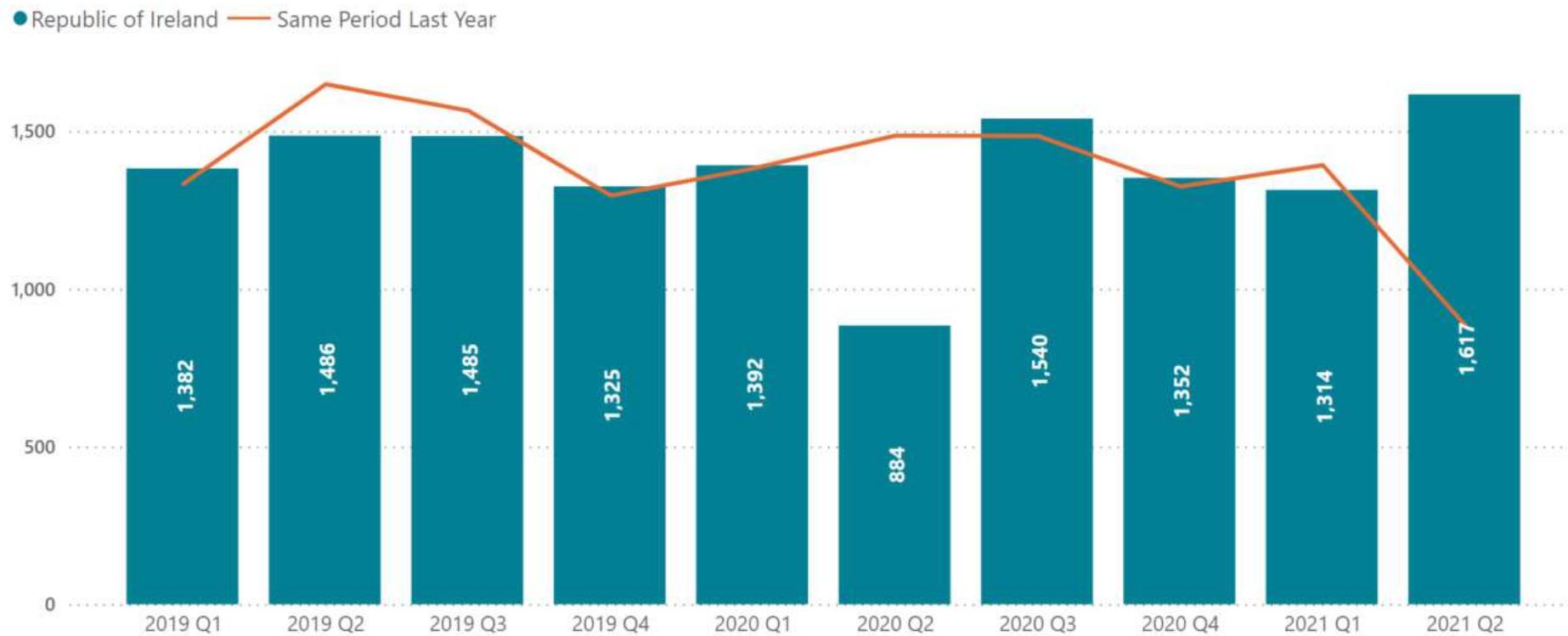
Sector	Q2 2021	Q1 2021	% Change	Q2 2020	% Change	2020 AVG	% Change	2019 AVG	% Change
Residential	€ 2,428M	€ 2,237M	8.6% ↑	€ 1,716M	41.5% ↑	€ 2,224M	9.2% ↑	€ 1,765M	37.6% ↑
Non-Residential	€ 1,537M	€ 1,442M	6.6% ↑	€ 1,079M	42.4% ↑	€ 1,370M	12.2% ↑	€ 1,355M	13.5% ↑
Civil	€ 644M	€ 103M	-	€ 76M	-	€ 158M	307.7% ↑	€ 417M	54.5% ↑
Total	€ 4,609M	€ 3,782M	21.9% ↑	€ 2,871M	60.5% ↑	€ 3,752M	22.9% ↑	€ 3,537M	30.3% ↑

Q2 2021 Construction Activity Comparison by Region

Region	Q2 2021	Q1 2021	% Change	Q1 2020	% Change	2020 AVG	% Change	2019 AVG	% Change
Eastern & Midland	€ 2,489M	€ 2,855M	-12.8% ↓	€ 1,820M	36.8% ↑	€ 2,559M	-2.7% ↓	€ 2,222M	12.0% ↑
Southern	€ 1,525M	€ 683M	123.2% ↑	€ 905M	68.6% ↑	€ 953M	60.1% ↑	€ 869M	75.5% ↑
Northern & Western	€ 595M	€ 243M	144.7% ↑	€ 146M	306.2% ↑	€ 240M	147.4% ↑	€ 445M	33.6% ↑
Total	€ 4,609M	€ 3,782M	21.9% ↑	€ 2,871M	60.5% ↑	€ 3,752M	22.9% ↑	€ 3,537M	30.3% ↑

² Excluding Self Build and Student Accommodation applications

Plans Granted by Volume



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RESIDENTIAL

- There were 11k+ units granted approval in the quarter over 297 projects representing a 29% increase over same quarter in 2020
- There was a fall in the value and volume of scheme housing in the Southern and Eastern & Midland regions but a significant increase in the Northern and Western region from Q2 2020
- There was a 76% increase in apartment development units granted permission from Q2 2020 - 7,279 (5,250 in Eastern & Midland Region)
- The largest application granted permission for Glenveagh Properties plc was [1002 apartment units](#) located at the South Docks in Cork.

NON-RESIDENTIAL

- The value of planning grants was up 42% to €1.54b from Q2 2020 and 6.6% from Q1 2021
- There was a decline in the overall value of planning grants in the Hospitality, Medical and Education sectors over same period in 2020
- Large increases in value of grants in Industrial and Agricultural sectors
- Nearly double the number of projects granted permission in Eastern & Midland Region – 385 – compared to Q2 2020
- There was a 52% increase in the value of applications granted planning permission in the Dublin region from Q2 2020, rising to a total of €636m of pipeline investment
- The largest project was a €135m project for a [mixed leisure, entertainment and retail extension](#) to the existing Liffey Valley Centre (currently under appeal)

PROJECT STARTS

Q2 2021 Construction Activity Comparison by Sector

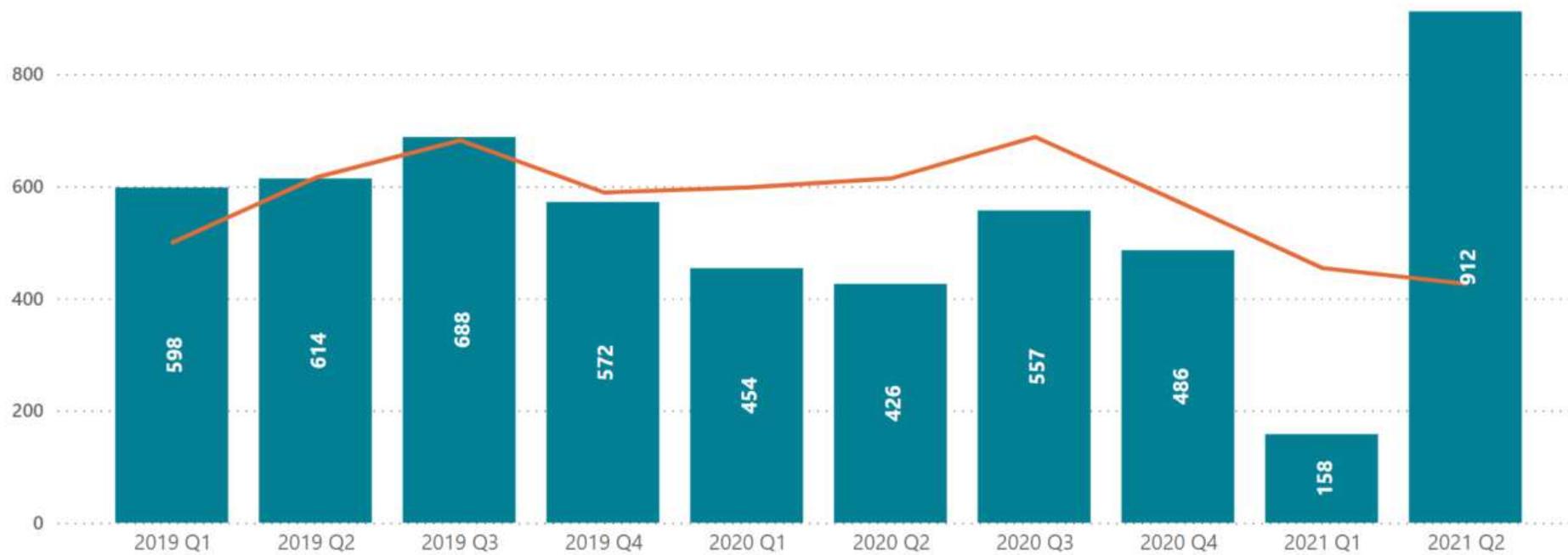
Sector	Q2 2021	Q1 2021	% Change	Q2 2020	% Change	2020 AVG	% Change	2019 AVG	% Change
Residential	€ 2,730M	€ 304M	-	€ 1,001M	172.7% ↑	€ 881M	209.8% ↑	€ 878M	211.0% ↑
Non-Residential	€ 1,278M	€ 265M	383.0% ↑	€ 459M	178.4% ↑	€ 672M	90.3% ↑	€ 853M	49.9% ↑
Civil	€ 265M	€ 203M	30.8% ↑	€ 97M	172.9% ↑	€ 224M	18.6% ↑	€ 187M	41.8% ↑
Total	€ 4,274M	€ 771M	454.2% ↑	€ 1,557M	174.4% ↑	€ 1,777M	140.5% ↑	€ 1,918M	122.8% ↑

Q2 2021 Construction Activity Comparison by Region

Region	Q2 2021	Q1 2021	% Change	Q1 2020	% Change	2020 AVG	% Change	2019 AVG	% Change
Eastern & Midland	€ 3,173M	€ 465M	-	€ 1,103M	187.7% ↑	€ 1,155M	174.8% ↑	€ 1,246M	154.7% ↑
Southern	€ 840M	€ 249M	237.4% ↑	€ 356M	136.3% ↑	€ 401M	109.7% ↑	€ 423M	98.7% ↑
Northern & Western	€ 260M	€ 58M	351.5% ↑	€ 99M	162.7% ↑	€ 221M	17.5% ↑	€ 249M	4.4% ↑
Total	€ 4,274M	€ 771M	454.2% ↑	€ 1,557M	174.4% ↑	€ 1,777M	140.5% ↑	€ 1,918M	122.8% ↑

Start by Volume

● Republic of Ireland — Same Period Last Year



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A huge increase in project starts was recorded in Q2 2021 reflecting delayed starts from the virtual industry shutdown in Q1 2021.

RESIDENTIAL

- Residential starts were up 173% from Q2 2020 to €2.7b
- 356 residential projects began in the quarter
- Almost equal numbers of apartments and scheme housing are represented
- The five largest projects are all in Dublin

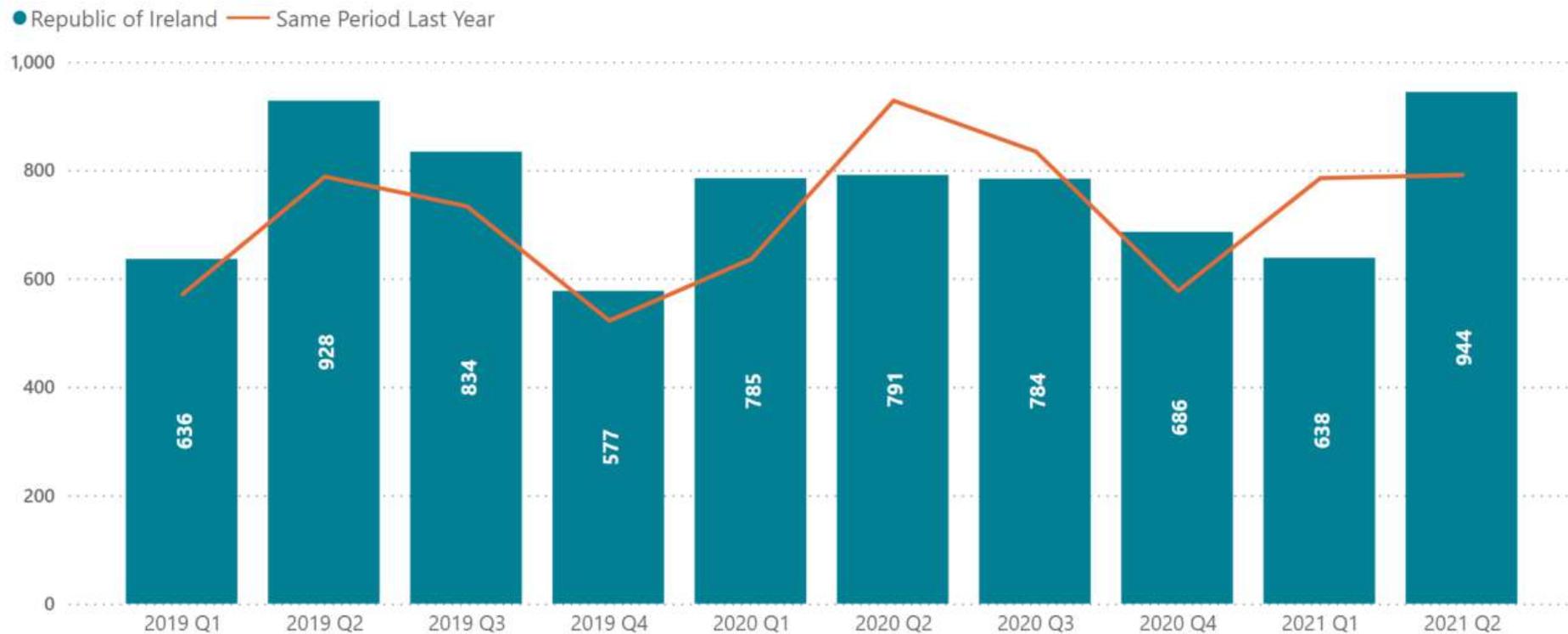
NON-RESIDENTIAL

- Non-residential starts accounted €1.3b in value – up by 178% over Q2 2020
- The Higher Education sector was the only sector that showed a decline over Q2 2020
- The construction of 689 Nursing homes and 472 hotel beds got under way



PUBLIC SECTOR CONSTRUCTION TENDERS

Tender by Volume



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NORTHERN IRELAND

Pipeline activity in NI increased by 6% and 39% in terms of planning applications and planning grants respectively from Q2 2020 although there was a 16% fall in planning grants for Residential projects.

As with ROI, project starts are up significantly in this quarter from Q2 2020 and although there is a 43% increase on in the ground activity when compared to the quarterly average for 2019, this figure is masked by a 162% increase in residential starts.

The non-residential and civil sectors both showed declines when compared to 2019 quarterly average, falling 39% and 33% respectively.



PLANNING APPLICATIONS³

Q2 2021 Construction Activity Comparison by Sector

Sector	Q2 2021	Q1 2021	% Change	Q2 2020	% Change	2020 AVG	% Change	2019 AVG	% Change
Residential	€ 254M	€ 331M	-23.3% ↓	€ 248M	2.6% ↑	€ 247M	2.7% ↑	€ 256M	-0.6% ↓
Non-Residential	€ 235M	€ 236M	-0.5% ↓	€ 215M	9.2% ↑	€ 257M	-8.7% ↓	€ 250M	-5.9% ↓
Civil	€ 10M	€ 26M	-60.0% ↓	€ 10M	5.8% ↑	€ 17M	-38.4% ↓	€ 15M	-33.5% ↓
Total	€ 499M	€ 593M	-15.8% ↓	€ 472M	5.7% ↑	€ 521M	-4.2% ↓	€ 520M	-4.1% ↓

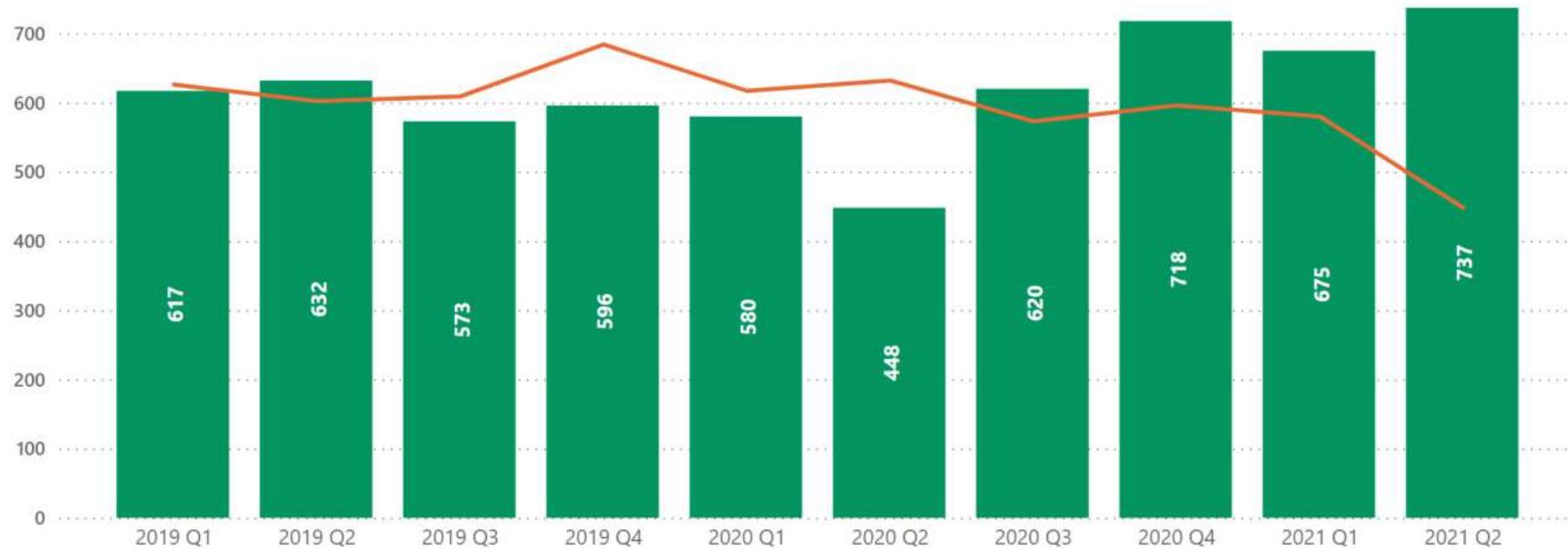
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Northern Ireland	€ 499M	€ 593M	-15.8% ↓	€ 472M	5.7% ↑	€ 521M	-4.2% ↓	€ 520M	-4.1% ↓
Total	€ 499M	€ 593M	-15.8% ↓	€ 472M	5.7% ↑	€ 521M	-4.2% ↓	€ 520M	-4.1% ↓

³ Excluding Self Build and Student Accommodation applications

Plans Submitted by Volume

● Northern Ireland — Same Period Last Year



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PLANNING GRANTS⁴

Q2 2021 Construction Activity Comparison by Sector

Sector	Q2 2021	Q1 2021	% Change	Q2 2020	% Change	2020 AVG	% Change	2019 AVG	% Change
Non-Residential	€ 337M	€ 278M	21.1% ↑	€ 169M	99.6% ↑	€ 255M	32.1% ↑	€ 321M	5.0% ↑
Residential	€ 195M	€ 331M	-41.1% ↓	€ 233M	-16.3% ↓	€ 205M	-4.8% ↓	€ 307M	-36.5% ↓
Civil	€ 43M	€ 17M	155.2% ↑	€ 11M	282.2% ↑	€ 14M	205.2% ↑	€ 138M	-68.6% ↓
Total	€ 576M	€ 626M	-8.1% ↓	€ 413M	39.2% ↑	€ 474M	21.3% ↑	€ 767M	-24.9% ↓

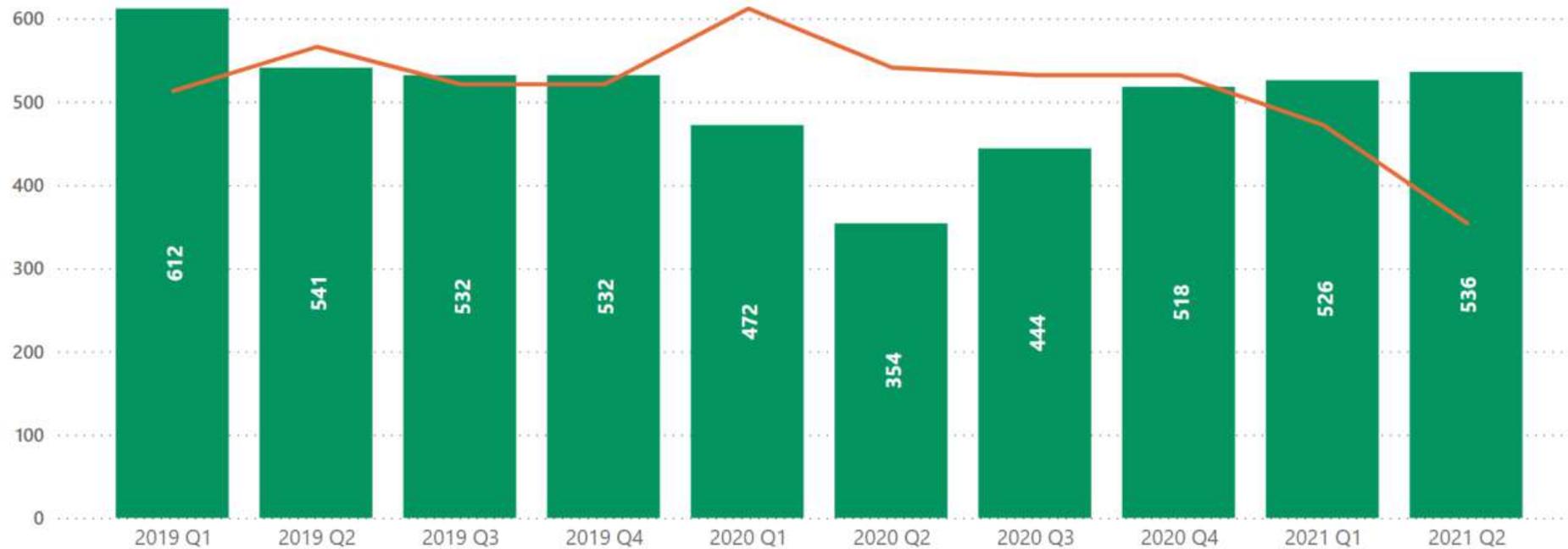
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Northern Ireland	€ 576M	€ 626M	-8.1% ↓	€ 413M	39.2% ↑	€ 474M	21.3% ↑	€ 767M	-24.9% ↓
Total	€ 576M	€ 626M	-8.1% ↓	€ 413M	39.2% ↑	€ 474M	21.3% ↑	€ 767M	-24.9% ↓

⁴ Excluding Self Build and Student Accommodation applications

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PROJECT STARTS

Q2 2021 Construction Activity Comparison by Sector

Sector	Q2 2021	Q1 2021	% Change	Q2 2020	% Change	2020 AVG	% Change	2019 AVG	% Change
Residential	€ 274M	€ 73M	275.4% ↑	€ 17M	-	€ 62M	342.9% ↑	€ 104M	162.6% ↑
Non-Residential	€ 88M	€ 99M	-10.8% ↓	€ 63M	39.4% ↑	€ 102M	-13.8% ↓	€ 145M	-39.1% ↓
Civil	€ 6M	€ 9M	-37.6% ↓	€ 3M	76.7% ↑	€ 5M	9.0% ↑	€ 9M	-32.7% ↓
Total	€ 368M	€ 181M	103.2% ↑	€ 84M	339.1% ↑	€ 169M	117.3% ↑	€ 258M	42.8% ↑

Q2 2021 Construction Activity Comparison by Region

Region	Q2 2021	Q1 2021	% Change	Q1 2020	% Change	2020 AVG	% Change	2019 AVG	% Change
Northern Ireland	€ 368M	€ 181M	103.2% ↑	€ 84M	339.1% ↑	€ 169M	117.3% ↑	€ 258M	42.8% ↑
Total	€ 368M	€ 181M	103.2% ↑	€ 84M	339.1% ↑	€ 169M	117.3% ↑	€ 258M	42.8% ↑

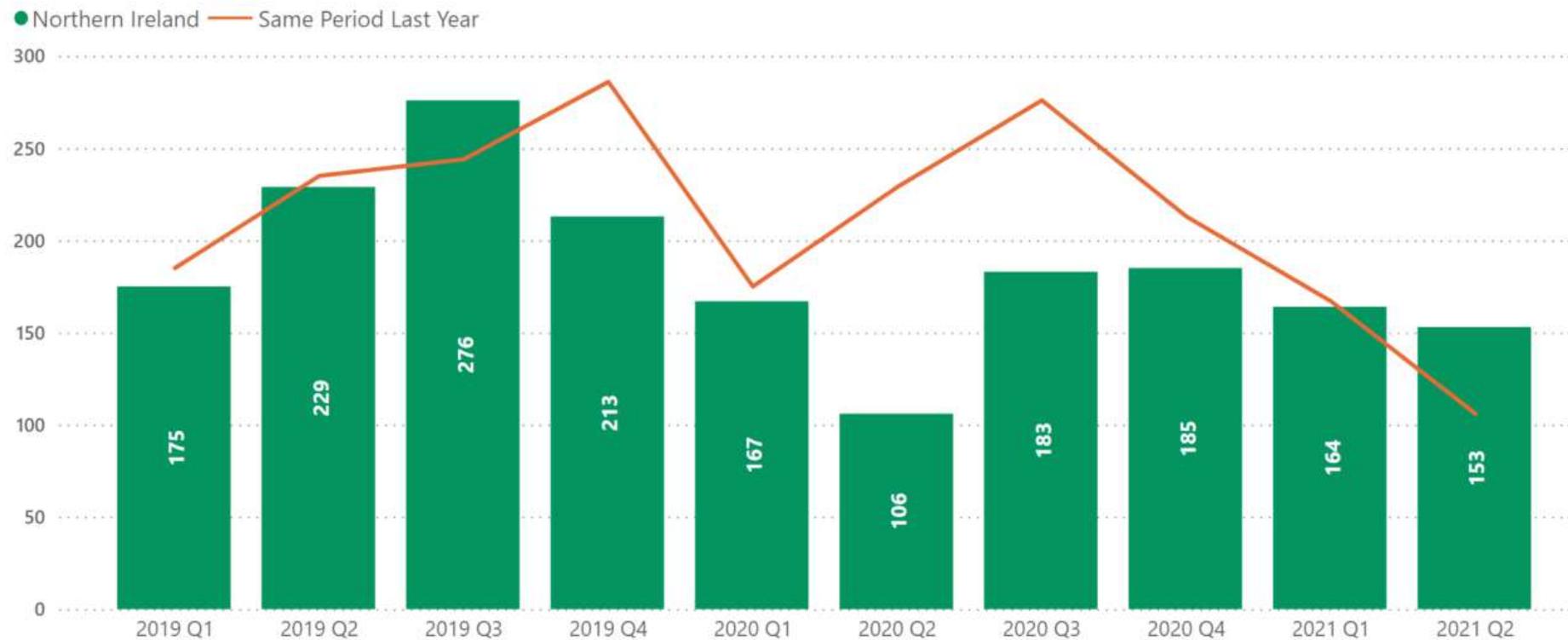
Start by Volume

● Northern Ireland — Same Period Last Year



PUBLIC SECTOR CONSTRUCTION TENDERS

Tender by Volume





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