

Q3 2020 CONSTRUCTION ACTIVITY REPORT



CIS | CONSTRUCTION
INFORMATION
SERVICES

COMPILED BY

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OVERVIEW

Q3 2020

CONSTRUCTION ACTIVITY

This report and the associated analysis online on www.cisireland.com, details the levels of pipeline and active construction over the period covering Quarter 3 2020. It is an important review in that it gives an insight into the recovery in the period immediately post Covid lockdown in March 2020 and in advance of further restrictions now being faced by both jurisdictions in Ireland.

Our analysis shows a 19% decline in pipeline activity in the non-residential sector in the Republic of Ireland over the same period in 2019. In particular the Commercial and Hospitality sectors have shown 23% decline in comparison to Q3 2019. In Northern Ireland all sectors outside of Medical and Commercial have shown significant decline. Overall figures however show a positive increase in investment due to the £500m regeneration proposals known as Tribeca Belfast.

In the residential sector pipeline investment in ROI shows a massive 50% increase in investment to €3.17bn, when compared to the same period last year, representing over 15,000 housing units. Northern Ireland shows a 12% fall in investment value over the same period and a 3% decline in the number of housing units planned in the period at 2,351.

Project starts in the Republic of Ireland in the non-residential sector are in overall decline. The value of projects started in Q3 fell by 21% over the same period last year and the overall number of projects started fell by 28% to 382. The Medical sector was the only sector to show an increase in the period, rising by 41% over Q3 2019 to €127m. Commercial, Retail and Hospitality project starts fell by 33% and Education projects starts by 50%. In Northern Ireland the decline in the value of non-residential project starts was less pronounced at 9% however the number of projects started overall fell by 23%.

In the Residential sector project starts in the Republic of Ireland fell by 2% in terms of both value and the number of projects but overall, the number of residential units commencing increased by 2%. In Northern Ireland residential project starts increased across the board from Q3 2019 in terms of value, number of projects and number of residential units.

To date, the industry has performed well under compromised conditions and has been exempt from the Covid restrictions imposed on other sectors of the economy. Whilst there have been some Covid cases on sites, the vast majority have stayed open and operational. CIS will be closely monitoring the situation on sites and reporting on changes in terms of project delays and mitigating factors. We will also be closely monitoring key indicators that may impact future activity such as the planning pipeline and the volume and timelines of tenders, project commencements and completions.

COVID-19

In a collaborative effort to minimise the impact of Covid on construction activity the two industry representative bodies, the Construction Industry Federation (ROI) and the Construction Employers Federation (NI), have jointly called on their members to collaborate on a cross border basis on tackling Covid-19.

Tom Parlon, Director General, CIF stated:

“Construction across the island has performed well so far and we’re asking our members to encourage their employees and their sub-contractors to keep disciplined when it comes to Covid-19 whether they

OVERVIEW

are on site, off-site or on the way to site. Because of the strong ties across the border, we've asked our members to engage with Northern Irish contractors operating on their sites to ensure adherence with our SOP. As usual, the response has been positive and our industry, North and South is responding. Such is the importance of keeping Covid-19 out of our sites, we're finding companies are willing to put in place any measure that's viewed as helpful."

Mark Spence, incoming Managing Director, CEF stated:

"The construction industry north and south on the island has led the way in adapting to the evolving safety measures required to keep our people and our communities safe. The latest escalation in Covid-19 cases on both sides of the border with related increased restrictions makes it more important than ever for everyone involved in construction across the island to reinforce compliance with the best practice guidance from CIF and CEF in each jurisdiction. The common principles whether on-site or off-site of hand washing, social distancing and face coverings remain vital to maintaining the relatively low incidence amongst the construction community whilst vitally protecting the wider community in which we work and live. Only by doing this can we protect lives, sustain economic activity and retain jobs in our industry.

Yours,

Tom Moloney

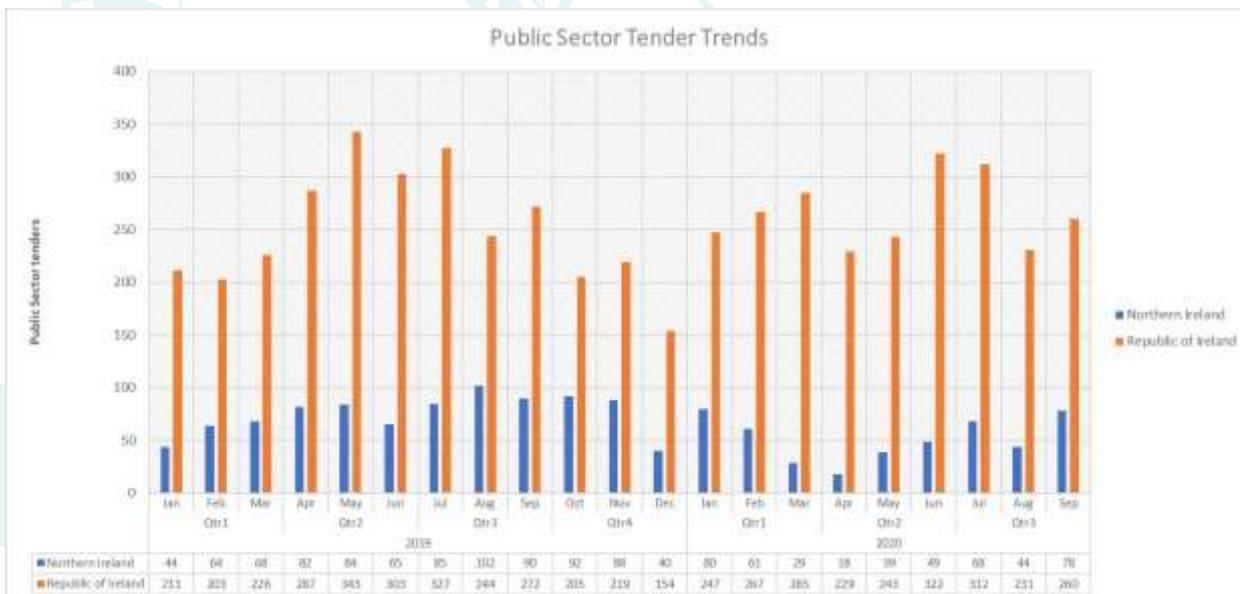
Managing Director, Construction Information Services



TRENDS



OVERVIEW



COMMERCIAL, RETAIL AND HOSPITALITY

REPUBLIC OF IRELAND

This sector showed an overall decline of 23% in pipeline investment over the same period last year. Investment in hotels fell by 21% over the period although the number of hotel beds increased to 882 - a rise of 13%. Investment in bars and restaurants bucked the trend rising by 16% over Q3 2019. Project starts fell by 1/3 over the Q3 2019 to €311m representing a 19% drop in overall floor area.

PROJECTS OF NOTE

- Planning application was lodged with Fingal County Council by Channor Limited for an office development of 23,180 m² of floor space located at Blanchardstown Corporate Park. The €46m development will comprise of 2 office buildings and will reach a height of 9 storeys is granted permission.
- In Dublin 2, IPUT Management Services Limited submitted an office development application to Dublin City Council. The company are seeking to build 12,947 m² of floor space at a site located on Mount Street Lower. The 5-storey development has a shell and core construction cost estimate of €21.8m.
- A large mixed-use application was granted permission for Esprit Investments Limited. The development on Shaw Street, Dublin 2 will comprise of mainly offices and a small residential element of 45 apartments. The apartments have been classified as build-to-rent in the planning application and the overall €35m building will be 11 storeys high upon completion.
- In Sandyford, Dublin 18, Property Rentals Property Management Limited have been granted planning permission by Dun Laoghaire Rathdown County Council for a €11m mixed-use development on Corrig Road. The 6 Storey development will comprise of offices and a café.
- Central Park GP CO ProPco Limited have given the go ahead to Shannon Valley Plant Hire to commence enabling works on a 3-office building development at Central Park, Leopardstown, Dublin 18. The €92m office development will have a floor area comprising of 47,364 m² and will peak at 9 storeys high upon completion of the main works.
- In Dublin 2, enabling works have commenced on a €58m Office Development at Harcourt Place, Dublin 2 for Slievencourt DAC. The development will have a floor area 27,622 m² when main works are completed and will also be 9 storeys high.

COMMERCIAL, RETAIL AND HOSPITALITY

PIPELINE Q3 2020 REPUBLIC OF IRELAND

Projects

216
-22%
(vs Q3 2019)

Project Value

€ 251.83M
-23%
(vs Q3 2019)

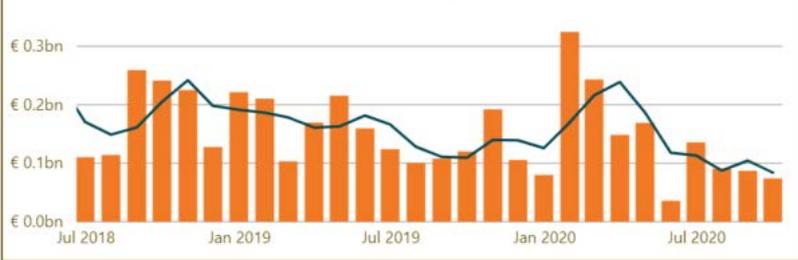
Floor Area (SqM)

169.56K
-32%
(vs Q3 2019)

Hotel Beds

882
+13%
(vs Q3 2019)

Planning Grants -Rolling 3 Month Avg



Top Projects Granted Q3 2020

CIS ID	Project	County	Client	Value
1082597	€35m - Mixed Use Development	Co. Dublin	Esprit Investments Limited	€ 36M
1107444	€20m - Hotel Development	Co. Dublin	Cuideachta Faoi Theorainn Rathaiochta	€ 20M
1073056	€20m - Hotel Development	Co. Dublin	Midsal Homes Limited	€ 20M
811480	€20m - Mixed Use Development	Co. Dublin		€ 20M
1114645	€17m - Hotel/Office Development	Co. Cork	Quakeside Limited	€ 17M

REGIONS

EASTERN AND MIDLAND

Projects

93
-30%
(vs Q3 2019)

Project Value

€ 181.51M
+3%
(vs Q3 2019)

Floor Area (SqM)

118.91K
-23%
(vs Q3 2019)

Hotel Beds

695
+43%
(vs Q3 2019)



SOUTHERN

Projects

77
-13%
(vs Q3 2019)

Project Value

€ 50.12M
-60%
(vs Q3 2019)

Floor Area (SqM)

34.7K
-53%
(vs Q3 2019)

Hotel Beds

187
-25%
(vs Q3 2019)



NORTHERN AND WESTERN

Projects

46
-18%
(vs Q3 2019)

Project Value

€ 20.21M
-23%
(vs Q3 2019)

Floor Area (SqM)

15.94K
-23%
(vs Q3 2019)

Hotel Beds

0
-100%
(vs Q3 2019)



COMMERCIAL, RETAIL AND HOSPITALITY

STARTS Q3 2020 REPUBLIC OF IRELAND

Projects

89
-38%
(vs Q3 2019)

Project Value

€ 311.6M
-33%
(vs Q3 2019)

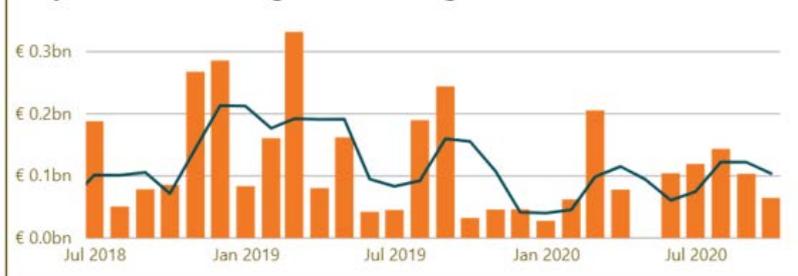
Floor Area (SqM)

179.03K
-19%
(vs Q3 2019)

Hotel Beds

134
-73%
(vs Q3 2019)

Project Starts -Rolling 3 Month Avg



Top Projects Started Q3 2020

ProjectID	Project	County	Client	Value
1055629	€92m - 3 Office Buildings	Co. Dublin	Central Park GP CO ProPco Limited	€ 92M
1069784	€76m - Mixed Use Development	Co. Dublin	Kennedy Wilson Europe Limited	€ 77M
1025713	€58m - Office Development - Enabling Works	Co. Dublin	Clancourt Management	€ 59M
1067535	€35.7m - Office Development	Co. Dublin	Balark Investments Limited	€ 36M
1084315	€9.2m - Hotel Development	Co. Dublin	Red Rock BPKH Limited	€ 9M

REGIONS

EASTERN AND MIDLAND

Projects

40
-40%
(vs Q3 2019)

Project Value

€ 293.5M
+94%
(vs Q3 2019)

Floor Area (SqM)

163.25K
+60%
(vs Q3 2019)

Hotel Beds

128
-57%
(vs Q3 2019)



SOUTHERN

Projects

24
-56%
(vs Q3 2019)

Project Value

€ 10.75M
-91%
(vs Q3 2019)

Floor Area (SqM)

10.71K
-47%
(vs Q3 2019)

Hotel Beds

0
-100%
(vs Q3 2019)



NORTHERN AND WESTERN

Projects

25
+14%
(vs Q3 2019)

Project Value

€ 7.35M
-96%
(vs Q3 2019)

Floor Area (SqM)

5,068
-95%
(vs Q3 2019)

Hotel Beds

6
-97%
(vs Q3 2019)



COMMERCIAL, RETAIL AND HOSPITALITY

NORTHERN IRELAND

Pipeline investment in NI rose significantly over Q3 2019 on the back of the £500m Phased Regeneration Proposals known as Tribeca Belfast. Project starts however were down by nearly 50% over the same period last year.

PROJECTS OF NOTE

- Plans were submitted by Harcourt Developments in Q3 for the creation of a 4-storey social hub in Belfast comprising traditional bars, restaurants and casual office space.
- Plans designed by Clarman Limited were submitted for a new £2.5 million petrol filling station development in Castlederg, Co. Tyrone.
- In Belfast it has been proposed during to create a 21-bedroom hotel using stacked containers over 5 storeys.
- Plans approved for the construction of a £12 million aquarium in Belfast designed by Ethis Architects for ReefLIVE.
- A Game of Thrones visitor attraction in Banbridge, Co. Down was also approved by the planners. Overall investment is put at £24 million.
- In the retail sector during Q3 work got underway on a new £5.5 million Lidl supermarket in Newtownards, Co. Down. Works will complete Q2 2021.

PIPELINE Q3 2020 NORTHERN IRELAND

Projects



Project Value



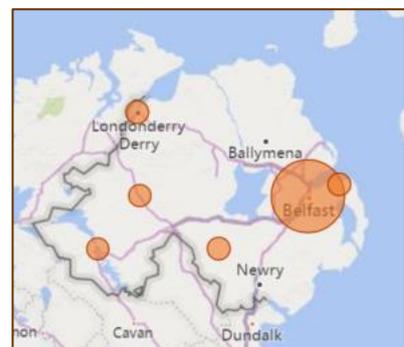
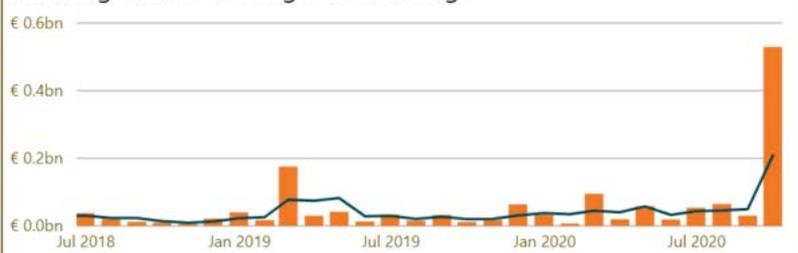
Floor Area (SqM)



Hotel Beds



Planning Grants -Rolling 3 Month Avg



Top Projects Granted Q3 2020

CIS ID	Project	County	Client	Value
585638	£500m - Phased Regeneration Proposals (Tribeca Belfast)	Co. Antrim	Castlebrooke Investments	€ 500M
922310	£50m - Grade A Office Development	Co. Antrim	Swinford (Sirocco) Limited	€ 50M
1056998	£21.5m - Film Studio Complex, Phase 2	Co. Antrim	Belfast Harbour Commissioners	€ 22M
1059165	£12m - Aquarium	Co. Antrim	ReefLIVE Limited	€ 12M
1082241	£5.7m - Visitor Attraction	Co. Down	Linen Mill Film and TV Studio	€ 6M

COMMERCIAL, RETAIL AND HOSPITALITY

STARTS Q3 2020 NORTHERN IRELAND

Projects

4
-71%
(vs Q3 2019)

Project Value

€ 9.42M
-49%
(vs Q3 2019)

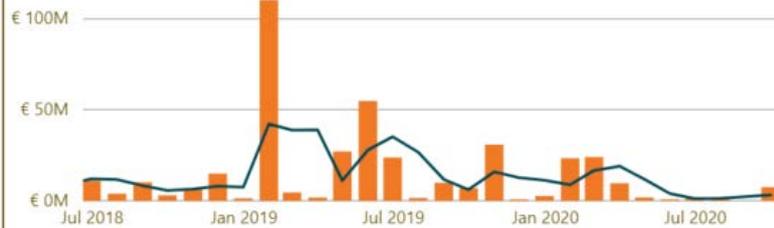
Floor Area (SqM)

4,981
-68%
(vs Q3 2019)

Hotel Beds

0
-100%
(vs Q3 2019)

Project Starts -Rolling 3 Month Avg



Top Projects Started Q3 2020

ProjectID	Project	County	Client	Value
1010954	£5.5m - New Lidl Supermarket	Co. Down	Castlebawn Newtownards Limited	€ 6M
956560	£1.9m - Retail Unit	Co. Londonderry	TJ Morris Limited (Home Bargains)	€ 2M
1034049	£1.1m - Heritage Led Regeneration and Development with Site Improvements	Co. Down	Construction and Procurement Delivery (CPD)	€ 1M
1016247	£900k - Drive Through Coffee Shop	Co. Londonderry	SK Group (Tim Horton's)	€ 1M

INDUSTRIAL

REPUBLIC OF IRELAND

Pipeline investment in the industrial sector remained steady over the same period last year showing a modest 3% decline in value. Over half of the investment can be attributed to Data Centres. The value of project starts was down 7% over Q3 2019 to €358m and nearly 70% of the investment (€247m) came from data centres.

PROJECTS OF NOTE

- Plans applied for two large scale developments in Dublin. These comprised a €10 million light industrial development in Ballycoolin and a €57 million warehouse development for MLEU Limited in Dublin 22.
- Plans were approved in Wicklow for a €8 million development of new facilities at Ardmore Studios.
- Plans also granted for a €10.3 million light industrial unit development in Ballycoolin in Dublin, proposing over 10,000 sq.m of new industrial space.
- Works started on a €152m Data Centre development in Baldonnell in Dublin 22 . The project will see the delivery of over 80,000 sq.m of data centre facilities being delivered.
- Also, in Dublin, works commenced this quarter on a warehouse and logistics unit of nearly 15,000 sq.m in Swords.

INDUSTRIAL

STARTS Q3 2020 REPUBLIC OF IRELAND

Projects

58
+7%
(vs Q3 2019)

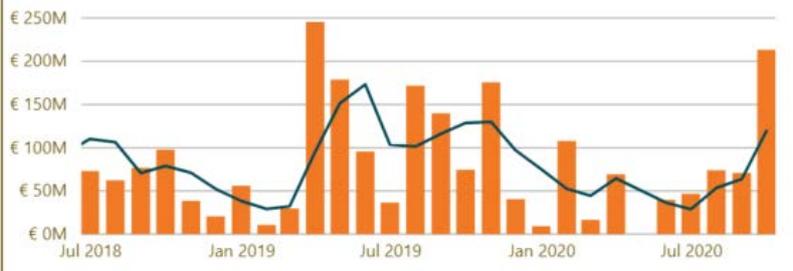
Project Value

€ 357.98M
-7%
(vs Q3 2019)

Floor Area (SqM)

249.68K
-21%
(vs Q3 2019)

Project Starts -Rolling 3 Month Avg



Top Projects Started Q3 2020

ProjectID	Project	County	Client	Value
1103118	€152m - Data Centre	Co. Dublin	UBC Properties LLC	€ 153M
1082324	€51m - Data Storage Centre	Co. Meath	Amazon Data Services Ireland Limited (ADSIL)	€ 52M
1015115	€42m - Data Storage Facility	Co. Dublin	Mullen Development Limited	€ 43M
844155	€24m - Warehousing Development	Co. Meath	Hickwell Limited	€ 24M
1050317	€12m - Warehouse and Office Development	Co. Dublin	Exeter Ireland Property II Limited	€ 12M

REGIONS

EASTERN AND MIDLAND

Projects

23
+21%
(vs Q3 2019)

Project Value

€ 321.35M
-5%
(vs Q3 2019)

Floor Area (SqM)

215.08K
-18%
(vs Q3 2019)



SOUTHERN

Projects

21
-5%
(vs Q3 2019)

Project Value

€ 28.08M
+3%
(vs Q3 2019)

Floor Area (SqM)

24.64K
-22%
(vs Q3 2019)



NORTHERN AND WESTERN

Projects

14
+8%
(vs Q3 2019)

Project Value

€ 8.55M
-58%
(vs Q3 2019)

Floor Area (SqM)

9,955
-58%
(vs Q3 2019)



INDUSTRIAL

NORTHERN IRELAND

Pipeline investment fell heavily in the Industrial sector in NI - down by 44% in value and floor area with a third fewer projects being approved. Project starts also fell significantly from Q3 2019 with only five projects identified as starting during the quarter.

PROJECTS OF NOTE

- Plans submitted for the provision of a small business park of 4 buildings, c.1,800 sq.m, in Coalisland, Co. Tyrone.
- Plans for a head office and food distribution facility were submitted for Morgan McLernon Transport Ltd in Armagh in a scheme costed at approximately £2.3 million.
- Plans were submitted by AJ Power to build a light industrial unit and research and development unit on their site in Portadown, Co. Armagh at a cost over £2 million.
- Outline planning approval was issued for a £21 million data centre development in Ballykelly, Co. Derry. MJM Group is behind the proposal.
- 11 industrial units for Antrim costing over £3 million were also approved in Q3.

PIPELINE Q3 2020 NORTHERN IRELAND

Projects



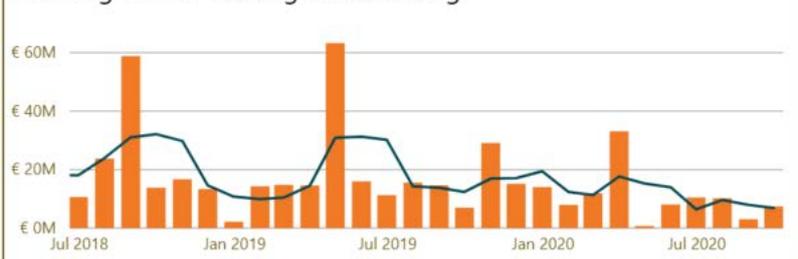
Project Value



Floor Area (SqM)



Planning Grants -Rolling 3 Month Avg



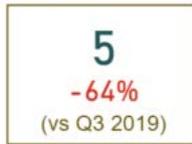
Top Projects Granted Q3 2020

CIS ID	Project	County	Client	Value
1082938	£3.3m - 11 Industrial Units	Co. Antrim		€ 3M
1055837	£2.2m - Materials Recovery Facility	Co. Armagh	Blue Sky Resource Recovery Limited	€ 2M
1091531	£1.4m - Industrial Unit Extension	Co. Armagh	Silverwood Properties Limited	€ 1M
1052351	£1.1m - Factory Extension	Co. Armagh	Rapid International Limited	€ 1M
1054550	£1m - 2 Warehouses	Co. Antrim	Coca-Cola HBC Northern Ireland	€ 1M

INDUSTRIAL

STARTS Q3 2020 NORTHERN IRELAND

Projects



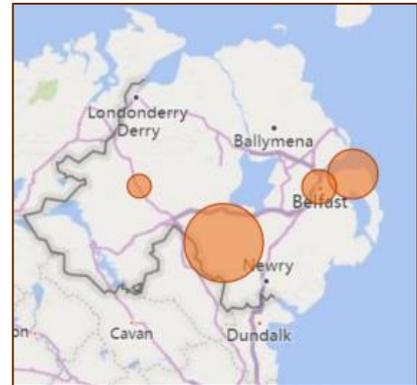
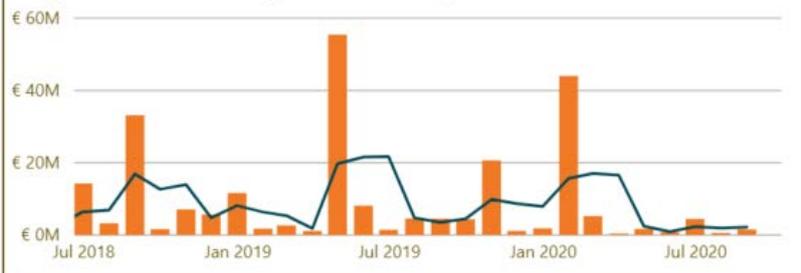
Project Value



Floor Area (SqM)



Project Starts -Rolling 3 Month Avg



Top Projects Started Q3 2020

ProjectID	Project	County	Client
1045406	£590k - Storage Building	Co. Down	Clerkin Elevation
1064599	£763k - Workshop	Co. Armagh	Enterprise Stationery Limited
1019444	£325k - Boat Station	Co. Armagh	Lough Neagh Rescue
1040790	£324k - Workshops/Offices	Co. Antrim	Nick Bonar Cars Limited
1061605	£143k - Storage Building	Co. Tyrone	Taggart Jack

EDUCATION

REPUBLIC OF IRELAND

Plans granted in fell in value by 9% over Q3 2019 with 158 projects getting the go ahead. In the higher education sector investment fell by 35% to €60m while in the school's sector investment rose by 57% to €66m. Project starts were down significantly over the same period last year falling by 50% to €60m with the number of projects started falling to 87 – down 36%. The higher education sector bore the brunt of the decline in investment falling by 84% to €11m.

PROJECTS OF NOTE

- Plans submitted for a new €12 million post-primary school development in Mungret in Limerick and also a €14 million extension at Carlow IT.
- Plans have been approved for an €18 million School Campus development in Sandymount Dublin 4. The development proposes 2 new school buildings on the site for Shellybanks Educate Together national school and Sandymount park educate together secondary school.
- Quarter three also witnessed the approval of a €45 million Future Tech Building at DCU's campus.
- Works commenced this quarter on a €4 million school development in Kanturk in Cork proposing 19 new classrooms and other ancillary accommodation.
- In the north west work also began on the construction of a €6 million school development in Lifford in Donegal proposing 24 new classrooms and other ancillary accommodation.

EDUCATION

PIPELINE Q3 2020 REPUBLIC OF IRELAND

Projects

158
-10%
(vs Q3 2019)

Project Value

€ 128.6M
-9%
(vs Q3 2019)

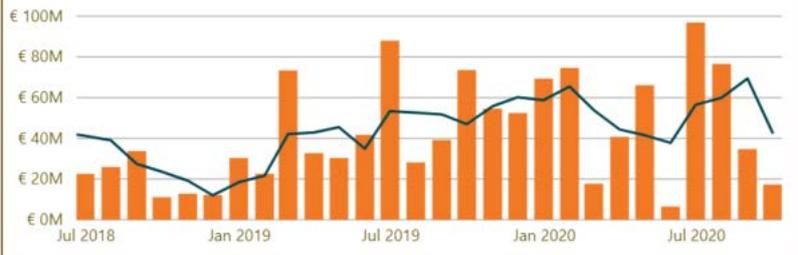
Floor Area (SqM)

86.77K
+3%
(vs Q3 2019)

Classrooms

367
+5%
(vs Q3 2019)

Planning Grants -Rolling 3 Month Avg



Top Projects Granted Q3 2020

CIS ID	Project	County	Client	Value
1088476	€45m - Future Tech Building	Co. Dublin	Dublin City University	€ 45M
1076319	€18m - School Development	Co. Dublin	Department of Education & Skills	€ 19M
1081909	€8.5m - School Development	Co. Limerick	Limerick and Clare Education and Training Board	€ 9M
1082026	€7m - Science Building	Co. Carlow	National Development Finance Agency	€ 7M
1066615	€4.6m - Administration Building	Co. Cork	Boston Scientific Cork Limited	€ 5M

REGIONS

EASTERN AND MIDLAND

Projects

60
-9%
(vs Q3 2019)

Project Value

€ 82.1M
-28%
(vs Q3 2019)

Floor Area (SqM)

43.97K
-23%
(vs Q3 2019)

Classrooms

158
+5%
(vs Q3 2019)



SOUTHERN

Projects

55
-5%
(vs Q3 2019)

Project Value

€ 34.38M
+128%
(vs Q3 2019)

Floor Area (SqM)

30.95K
+115%
(vs Q3 2019)

Classrooms

139
+20%
(vs Q3 2019)



NORTHERN AND WESTERN

Projects

43
-16%
(vs Q3 2019)

Project Value

€ 12.12M
+9%
(vs Q3 2019)

Floor Area (SqM)

11.85K
-7%
(vs Q3 2019)

Classrooms

70
-15%
(vs Q3 2019)



EDUCATION

STARTS Q3 2020 REPUBLIC OF IRELAND

Projects

87
-36%
(vs Q3 2019)

Project Value

€ 60.45M
-50%
(vs Q3 2019)

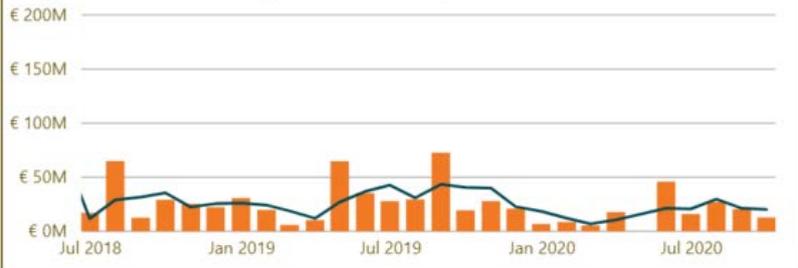
Floor Area (SqM)

37.68K
-31%
(vs Q3 2019)

Classrooms

282
-2%
(vs Q3 2019)

Project Starts -Rolling 3 Month Avg



Top Projects Started Q3 2020

ProjectID	Project	County	Client
814130	€4m - School Development	Co. Cork	Department of Education & Skills
820676	€3m - School Extension And Refurbishment	Co. Donegal	Department of Education & Skills
926521	€6.4m - School Development	Co. Donegal	Department of Education & Skills
1024344	€11m - Sports Science/Recreational Building	Co. Dublin	Department of Education & Skills
741944	€14m - School Development	Co. Dublin	St Patricks Junior & Senior School

REGIONS

EASTERN AND MIDLAND

Projects

30
-44%
(vs Q3 2019)

Project Value

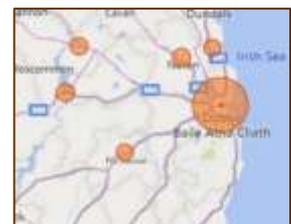
€ 33.03M
-59%
(vs Q3 2019)

Floor Area (SqM)

16.08K
-43%
(vs Q3 2019)

Classrooms

106
-15%
(vs Q3 2019)



SOUTHERN

Projects

32
-41%
(vs Q3 2019)

Project Value

€ 11.36M
-64%
(vs Q3 2019)

Floor Area (SqM)

10.23K
-49%
(vs Q3 2019)

Classrooms

88
-30%
(vs Q3 2019)



NORTHERN AND WESTERN

Projects

25
-14%
(vs Q3 2019)

Project Value

€ 16.06M
+57%
(vs Q3 2019)

Floor Area (SqM)

11.37K
+69%
(vs Q3 2019)

Classrooms

88
+132%
(vs Q3 2019)



EDUCATION

NORTHERN IRELAND

Plans approved in the Education sector fell in value by 44% to €31m with only 15 projects in the pipeline compared to Q3 2019. Fourteen new project started in this sector which is a significant increase on the same period last year but overall new starts remain on a low trajectory after 2018.

PROJECTS OF NOTE

- Plans submitted for a new £2 million school building in Dungiven, Co. Derry. Amongst other facilities will be 12 general classrooms. Gaelcholáiste Dhoire is behind the proposal.
- A £20 million new school is proposed for the Ardnashee School and College in Derry. The school will cater for 330 pupils and 167 staff members.
- Work started on site during Q3 on a new integrated primary school in Limavady, Co. Derry for Roe Valley Integrated Primary. A new 7-class base primary school and future single nursery unit is planned.

PIPELINE Q3 2020 NORTHERN IRELAND



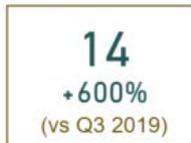
Top Projects Granted Q3 2020

CIS ID	Project	County	Client	Value
1046653	€28.5m - New 1,300 Pupil School Building	Co. Tyrone	Education Authority Northern Ireland	€ 29M
1102521	€710k - 2 Double Modular Classroom Units	Co. Londonderry	Education Authority for Northern Ireland	€ 1M
1090420	€521k - Preschool	Co. Antrim	Department of Education	€ 1M
1105959	€407k - 3 Modular Classrooms	Co. Antrim	Education Authority Northern Ireland	€ 0M
1098922	€289k - Extension and Alteration to School Dining Room	Co. Antrim	Department of Education	€ 0M

EDUCATION

STARTS Q3 2020 NORTHERN IRELAND

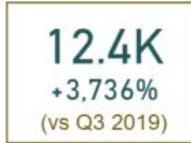
Projects



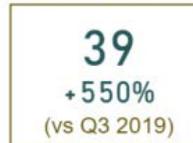
Project Value



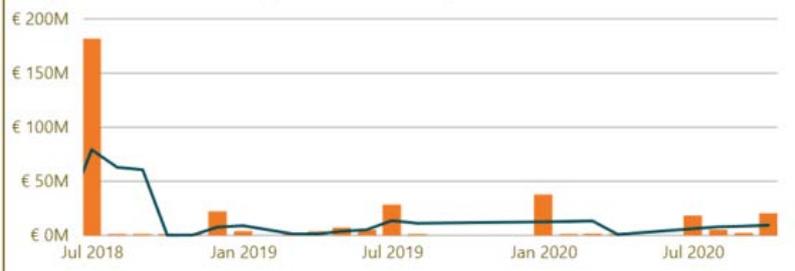
Floor Area (SqM)



Classrooms



Project Starts -Rolling 3 Month Avg



Top Projects Started Q3 2020

ProjectID	Project	County	Client
1056083	£20m - Teaching Facility	Co. Antrim	Department of Education
1081671	£887k - 7 Modular Classrooms	Co. Antrim	Department of Education
982328	£3.5m - New Integrated Primary School	Co. Londonderry	Department of Education
1096746	£427k - Modular Classroom Building	Co. Antrim	Education Authority for Northern Ireland
1089691	£658k - Modular Classroom Units	Co. Antrim	Education Authority for Northern Ireland

MEDICAL

REPUBLIC OF IRELAND

Plans approved in the medical sector in Q3 2020 fell by 30% over the same period in 2019 to €185m.

The nursing home sector accounted for nearly €100m of this figure with 912 new nursing home beds planned. Primary care centres also contributed significantly to the pipeline. Project starts remained steady this quarter and in comparison to Q3 2019 but overall investment rose by 41% to €127m boosted by investment in primary care centres which amounted to over €78m.

PROJECTS OF NOTE

- Quarter three saw plans being lodged in Wicklow for a €20m extension and refurbishment project at St. Colman's Hospital.
- Over the western side of the country, plans were lodged for an extension of permission for a €30 million Hospital Extension Galway University Hospital proposing a much-needed oncology centre, with work having recently commenced on this scheme.
- In the medical and care home sectors, quarter three saw the approval of a €16 million extension to St. Vincent's Hospital in Mountmellick in Laois and a €13 million care home development in Rathdrum in Wicklow. The project will see the creation of 62 nursing home bedspaces upon completion.
- Work is now underway on a €19 million 80 bed Community Nursing Unit, The Sheil Hospital, Ballyshannon in Donegal.
- Works also got underway on a €5 million extension to Clonakilty Community Hospital which will see the creation of 20 new bedspaces.

MEDICAL

PIPELINE Q3 2020 REPUBLIC OF IRELAND

Projects

56
-5%
(vs Q3 2019)

Project Value

€ 185.09M
-30%
(vs Q3 2019)

Floor Area (SqM)

90.66K
-7%
(vs Q3 2019)

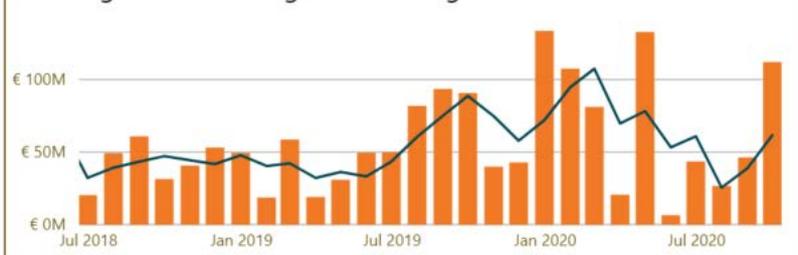
Hospital Beds

145
+150%
(vs Q3 2019)

Nursing Home Beds

912
+29%
(vs Q3 2019)

Planning Grants -Rolling 3 Month Avg



Top Projects Granted Q3 2020

CIS ID	Project	County	Client	Value
1116532	€21m - Extension to Hospital	Co. Wicklow	Health Service Executive Head Office	€ 21M
1080380	€18.3m - Nursing Home/Residential Development	Co. Donegal	Health Service Executive Head Office	€ 18M
1104891	€17m - Nursing Home	Co. Dublin	Mowlam Healthcare Services T/A Swords Nursing Homes	€ 18M
1099617	€16.2m - Hospital Extension	Co. Laois	Health Service Executive Head Office	€ 16M
1117632	€15.6m - Extension to Nursing Home	Co. Dublin	St Agnes Property Limited	€ 16M

REGIONS

EASTERN AND MIDLAND

Projects

33
+27%
(vs Q3 2019)

Project Value

€ 122.62M
+55%
(vs Q3 2019)

Floor Area (SqM)

56.97K
+93%
(vs Q3 2019)

Hospital Beds

145
+1,015%
(vs Q3 2019)

Nursing Home Beds

635
+127%
(vs Q3 2019)



SOUTHERN

Projects

9
-68%
(vs Q3 2019)

Project Value

€ 35.2M
-79%
(vs Q3 2019)

Floor Area (SqM)

18.83K
-68%
(vs Q3 2019)

Hospital Beds

0
-100%
(vs Q3 2019)

Nursing Home Beds

136
-53%
(vs Q3 2019)



NORTHERN AND WESTERN

Projects

14
+180%
(vs Q3 2019)

Project Value

€ 27.26M
+23%
(vs Q3 2019)

Floor Area (SqM)

14.86K
+60%
(vs Q3 2019)

Hospital Beds

0
(vs Q3 2019)

Nursing Home Beds

141
+5%
(vs Q3 2019)



MEDICAL

STARTS Q3 2020 REPUBLIC OF IRELAND

Projects	Project Value	Floor Area (SqM)	Hospital Beds	Nursing Home Beds
33 0% (vs Q3 2019)	€ 126.73M +41% (vs Q3 2019)	52K +35% (vs Q3 2019)	100 -3% (vs Q3 2019)	225 -31% (vs Q3 2019)

Project Starts -Rolling 3 Month Avg



Top Projects Started Q3 2020

ProjectID	Project	County	Client
1074910	€12m - Nursing Home Development	Co. Louth	Delsk Ireland
1015687	€15.5m - Primary Healthcare Centre/Retail Units	Co. Wicklow	Esmonde Developments
906154	€19m - Community Nursing Unit	Co. Donegal	HSE Estates North West
1034327	€18m - Primary Care Centre	Co. Donegal	Valley Healthcare Fund A Sub Fund of Infrastructure
1039990	€14m - Primary Care Health Facility/Cafe	Co. Clare	Valley Healthcare Fund Infrastructure Investment Fund ICAV

REGIONS

EASTERN AND MIDLAND

Projects	Project Value	Floor Area (SqM)	Hospital Beds	Nursing Home Beds
10 -52% (vs Q3 2019)	€ 40.86M -26% (vs Q3 2019)	18.07K -33% (vs Q3 2019)	0 -100% (vs Q3 2019)	130 -59% (vs Q3 2019)



SOUTHERN

Projects	Project Value	Floor Area (SqM)	Hospital Beds	Nursing Home Beds
13 +63% (vs Q3 2019)	€ 38.55M +33% (vs Q3 2019)	19.07K +116% (vs Q3 2019)	20 -76% (vs Q3 2019)	55 +1,000% (vs Q3 2019)



NORTHERN AND WESTERN

Projects	Project Value	Floor Area (SqM)	Hospital Beds	Nursing Home Beds
10 +150% (vs Q3 2019)	€ 47.32M +747% (vs Q3 2019)	14.86K +420% (vs Q3 2019)	80 (vs Q3 2019)	40 (vs Q3 2019)



MEDICAL

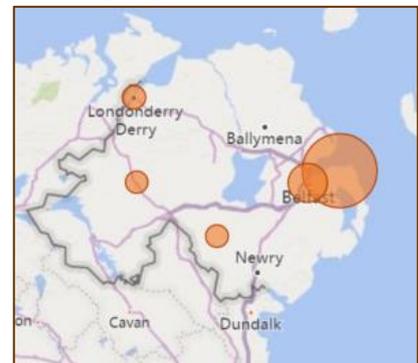
NORTHERN IRELAND

Although the number of projects granted planning permission fell by 18% to 14 over Q3 2019 the value of investment rose significantly by 344% to £45m. There were no significant project starts in the medical sector during this quarter in NI.

PROJECTS OF NOTE

- Plans were submitted for a £23.4 million retirement village development at the former Thornhill College site in County Londonderry.
- Plans were lodged for the development of an 87-bed dementia care nursing home and 13 x two-bed independent living units in Dundonald, Co. Down

PIPELINE Q3 2020 NORTHERN IRELAND



Top Projects Granted Q3 2020

CIS ID	Project	County	Client	Value
738842	€30m - Community Treatment and Care Centre	Co. Down	Southern Health and Social Care Trust	€ 30M
705913	€9.4m - Dementia Care Nursing Home and Independent Living Units	Co. Antrim	Industria Company (Ulster) LTD	€ 9M
939515	€1.9m - Nursing Home Extension	Co. Down	Kilmorey Care Limited	€ 2M
1117386	€1m - Accident and Emergency Department Extension	Co. Londonderry	Construction and Procurement Delivery (CPD)	€ 1M
1066717	€605k - Pre/After School Daycare Extension	Co. Down	Chatterbox Private Day Nursery	€ 1M

STARTS Q3 2020 NORTHERN IRELAND

No significant starts recorded for Medical sector in Northern Ireland for Q3 2020.

RESIDENTIAL

REPUBLIC OF IRELAND

Pipeline investment in the residential sector rose by 50% to €3.17b from the same period last year. The investment is spread over 265 projects (down 16%) and representing over 15k residential units. Over €2b of the investment was in apartments representing nearly 10k units – over 7k in Dublin alone. There were 140 new project starts in the quarter representing a 2% drop in investment over Q3 2019.

PROJECTS OF NOTE

- Castlethorn Construction have submitted a significant planning application in Dunshaughlin for a mixture of apartments and housing units. Overall, the developer is seeking planning permission from An Bord Pleanála through a strategic housing application for 415 units. The €91m application is expected to be decided on by February 2021.
- In Tallaght, Steelworks Property Developments Limited have submitted a strategic planning housing application to An Bord Pleanála for a 252-unit apartment development. The development site in Cookstown Industrial Estate has previously been refused planning permission on two occasions, the new application is expected to be decided on by February 2021.
- A large application was granted to Shorevale Limited for a development at the Royal Liver Assurance Retail Park on the Old Naas Road, Dublin 12. The application will allow for the construction of up to 1,012 apartment units as part of a build-to-rent development.
- In Raheny, Marlet Property Group Limited continued to expand on their growing landbank of residential units after An Bord Pleanála granted permission for a strategic housing development application for 657 apartments on the lands east to St. Paul's College on the Sybill Hill Road, Dublin 5.
- In Co. Wicklow, Cairn Homes plc, commenced works in July 2020 on an ambitious 426-unit development in Greystones. The €95m development will provide a mixture of 245 houses and 181 apartment units upon completion.
- In Stillorgan, John Paul Construction commenced works on behalf of Kennedy Wilson Europe for 287 apartment units at the 'Grange' on Brewery Road. The main construction works commenced in September 2020 and the contractors are expected to be on site with the development for 24 months.

RESIDENTIAL

PIPELINE Q3 2020 REPUBLIC OF IRELAND



REGIONS

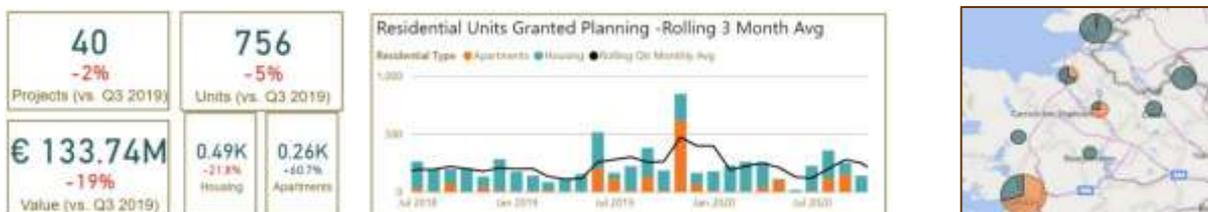
EASTERN AND MIDLAND



SOUTHERN



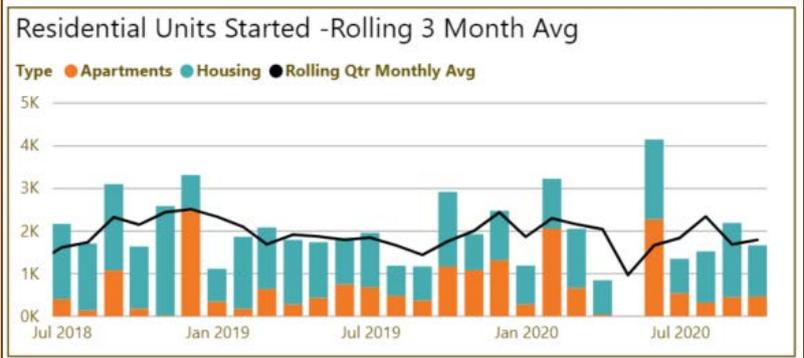
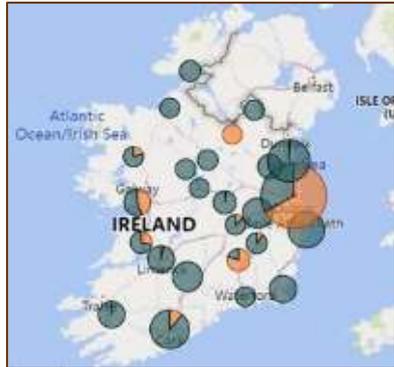
NORTHERN AND WESTERN



RESIDENTIAL

STARTS Q3 2020 REPUBLIC OF IRELAND

140 -2% Projects (vs. Q3 2019)	5377 +2% Units (vs. Q3 2019)
€ 853M -2% Value (vs. Q3 2019)	4,14K -27.3% Housing
	1.23K -39.0% Apartments



Top Residential Projects Started Q3 2020

ProjectID	Project	County	Client	Units
1016740	€105m - Residential Development	Co. Louth	Ballymakenny Developments Limited	688
1068806	€95m - Residential Development	Co. Wicklow	Cairn Homes PLC	426
837801	€30m - Residential Development/Creche	Co. Tipperary	Alchemist Developments Limited	297
1066091	€50m - Apartment Development	Co. Dublin	Kennedy Wilson Europe Limited	287
912112	€23m - Housing Development	Co. Cork	O'Brien & O'Flynn (In	244

REGIONS

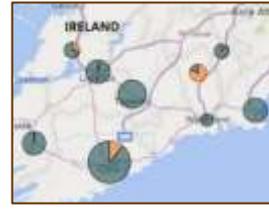
EASTERN AND MIDLAND

58 -23% Projects (vs. Q3 2019)	3267 -19% Units (vs. Q3 2019)
€ 559M -19% Value (vs. Q3 2019)	2.31K +6.6% Housing
	0.96K -49.3% Apartments



SOUTHERN

63 +34% Projects (vs. Q3 2019)	1786 +95% Units (vs. Q3 2019)
€ 252M +85% Value (vs. Q3 2019)	1.61K +102.3% Housing
	0.17K -45.0% Apartments



NORTHERN AND WESTERN

19 -10% Projects (vs. Q3 2019)	324 +6% Units (vs. Q3 2019)
€ 42M 0% Value (vs. Q3 2019)	0.22K -23.6% Housing
	0.1K -674.9% Apartments



RESIDENTIAL

NORTHERN IRELAND

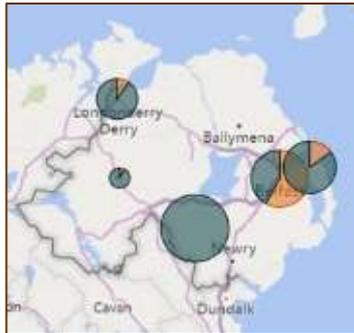
Pipeline investment in NI for Q3 2020 fell by 12% over Q3 2019 to £209m over 135 projects and representing 2,351 residential units. Belfast and Co. Down saw decreases in terms of units planned which Armagh and Derry showed a significant increase. Project starts in NI showed a positive picture over the same period last year with a 135% increase in investment to £78m from 18 projects and representing 663 units.

PROJECTS OF NOTE

- Plans were submitted by Radius Housing Association for a £20 million social and affordable housing development at the St Patrick's Barracks site in Ballymena, Co. Antrim.
- Plans were submitted for a 445 dwelling housing development in Co. Londonderry. This development is known as Parkhill Court.
- Plans were granted in Q3 2020 for a housing development at the former Deerpark Hotel site in Co. Antrim. This will see the construction of apartments, townhouses and semi-detached dwellings
- Lowry Construction, Co. Tyrone commenced work on site in Q3 2020 on a social housing development for Apex Housing Association in the Ard-Na-Small area of Dungiven.
- Works commenced at the site of former Ebrington Primary School, Co. Londonderry. This will see the construction of a 49 dwelling social housing development for Radius Housing Association.

RESIDENTIAL

PIPELINE Q3 2020 NORTHERN IRELAND



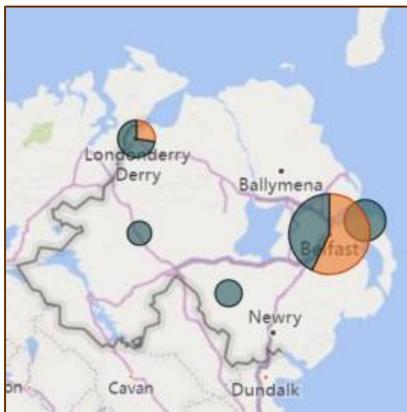
Residential Units Granted Planning -Rolling 3 Month Avg



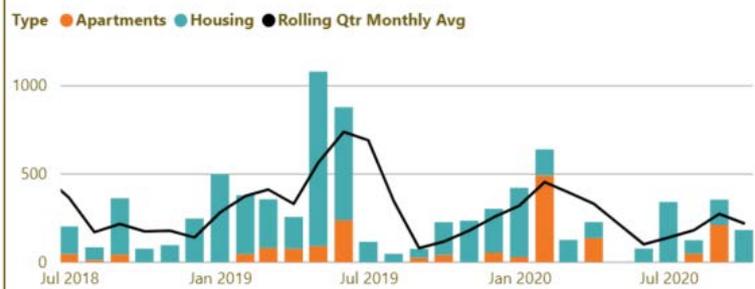
Top Residential Projects Granted Q3 2020

ProjectID	Project	County	Client	Units
948176	£34m - Residential Development	Co. Armagh	Sustar Limited	500
902483	£11m - Housing Development	Co. Londonderry		127
962921	£12m - Housing Development and Industrial Units	Co. Down	Comber Road Developments Limited	119
957853	£7.4m - Housing Development	Co. Londonderry	MG Famco Limited	97
994435	£8.5m - Apartment Development, Phase 4	Co. Antrim	Belvoir Park LLP	79

STARTS Q3 2020 NORTHERN IRELAND



Residential Units Started -Rolling 3 Month Avg



Top Residential Projects Started Q3 2020

ProjectID	Project	County	Client	Units
942246	£10m - Phased Residential Development	Co. Down	Rosemount Homes Limited	108
1006952	£8.7m - Apartment Development	Co. Antrim	HB Building Services	90
1021670	£12m - Apartments & Retail Development	Co. Antrim	Galgorm Group	79
903636	£11.8m - Community Hub with Residential and Commercial Redevelopment	Co. Antrim	Clanmil Housing Association	53
1046215	£6m - Housing Development	Co. Londonderry	Radius Housing Association	49
1059394	£5m - Residential Development	Co. Antrim	Connswater Homes Limited	49

OTHER SECTORS

See detailed analysis online in our interactive Q3 2020 report – www.cisireland.com

REPUBLIC OF IRELAND

COMMUNITY AND SPORT

- Planning submitted for a €1.6 million Sports Hall Building at St. Feargals College in Rathdowney in Laois
- Part 8 Planning lodged for a new €2.2 million Library and Community Facility in Bettystown in Meath
- In Donegal, plans were approved for a €900k wellness centre in Letterkenny.
- Plans approved in Wicklow for a €1.6 million Mountain Training Centre for outdoor events and pursuits.
- Works began on a new €800 clubhouse facility for Stillorgan RFC in Dublin 16.
- Work commenced on a new €8.3 million public park to compliment the ongoing regeneration development in Adamstown.

CIVIL, TRANSPORT, INFRASTRUCTURE

- Plans lodged for a €2.2 million renewable biogas facility in Tullamore in Offaly
- Plans lodged for a €5 million windfarm proising 10 new turbines for Coillte in Carrowmore in Sligo.
- Plans have been approved for a €320 million port expansion at Dublin Port.
- Plans were approved for a €3.3 million waste processing facility in Naas in Kildare.
- Works commenced on the €35 million Leixlip Transfer Pipeline and Wastewater Network Upgrade Project and will see the development of a new wastewater pumping station & associated works.
- Works are underway on construction of the €7 million Celbridge Link Road (2-way single-carriageway) linking Adamstown Strategic Development Zone to the R403 Celbridge Road. Works are expected to take in the region of 12 months to complete.

OTHER SECTORS

NORTHERN IRELAND

COMMUNITY AND SPORT

- Plans were submitted in the Community and Sports sector for a £1.5 million redevelopment of Newcastle Football club, Co. Down.
- Plans were granted for the redevelopment of the Carrick Rangers Football Club grounds and accommodation.
- Plans were granted for a new church hall in Co. Down for Trinity Free Presbyterian Church.
- Works commenced on site on a new build community facility for Derry and Strabane District Council in the Galliagh area of Co. Londonderry.

CIVIL, TRANSPORT, INFRASTRUCTURE

- Plans were submitted for the construction of an estimated £4.8 million windfarm development in Co. Londonderry.
- Work commenced on the Dromore Town Public Realm by contractor FP McCann Limited.
- Works commenced on the North West Cross Border Greenways Network - Route 3 Strabane.

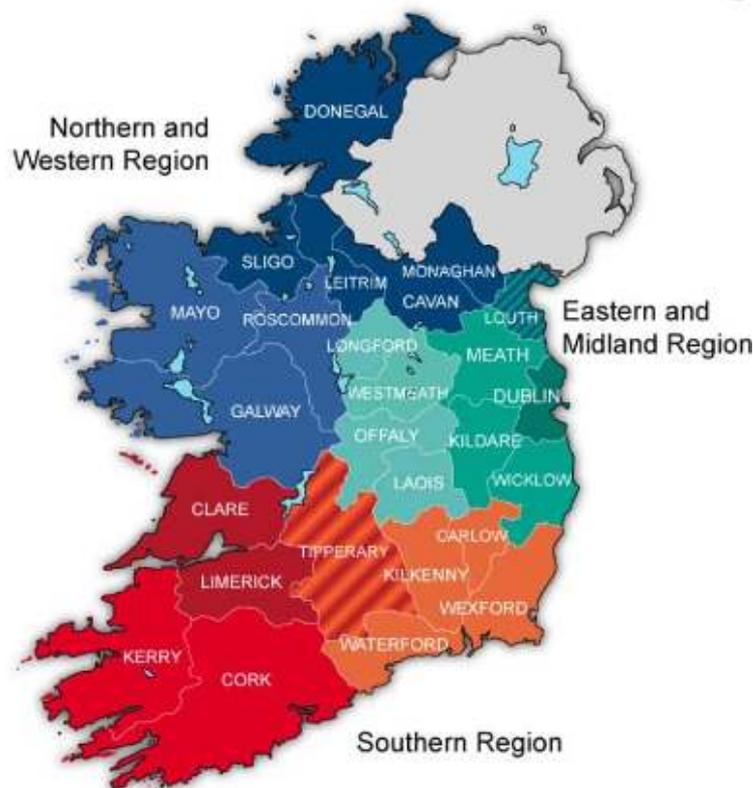
METHODOLOGY

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 IN REPORT

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





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