CUSHMAN & WAKEFIELD

RETAIL / COMMERCIAL JUSTIFICATION REPORT

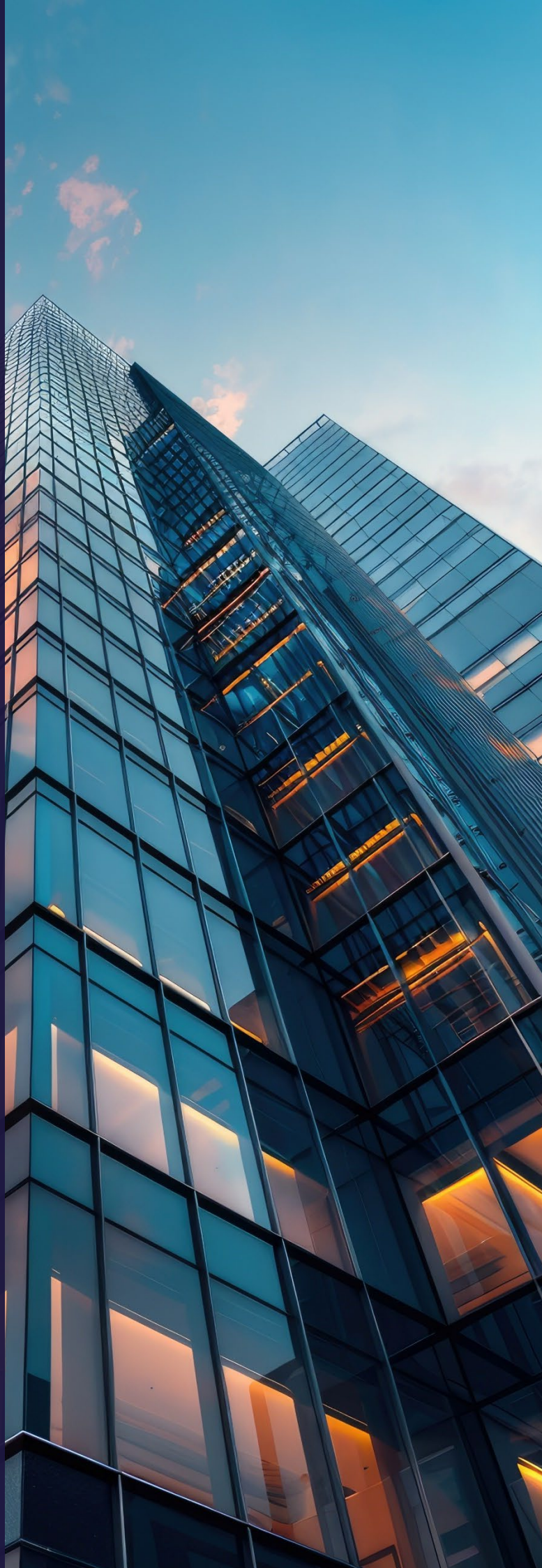
Clongriffin Wider Lands
Phase II

PREPARED FOR

The Land Development Agency

REPORT DATE:

May 2026



Better never settles

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Overview

This report outlines below our recommendations and justification in relation to the retail and commercial aspects of Phase II, Zones 7,8 & 9 in Clongriffin. The advice within this document takes regard of the existing provision (retail & commercial) both in the immediate vicinity of the site and within the catchment area as well as market demand and stock analysis reports which were previously commissioned for the location.



Please note the site outlined for illustrative purposes only.

Location

From the initial analysis of the proposed commercial accommodation and note the following characteristics of the location;

- **Excellent Transport Connectivity:** The site benefits from strong public transport links, with Clongriffin DART Station adjacent to the development. The station provides direct access to Dublin City Centre, with Connolly Station and the IFSC just seven stops away—approximately a 20-minute journey.
- **Proximity to Major Employment Hubs:** The two largest employment zones in Ireland—Dublin City Centre and Dublin Airport—are easily accessible. In addition, the location is well connected to numerous businesses and institutions situated across North Dublin and along the M50 corridor.
- **Established Residential Base and Amenities:** The area offers a wide range of residential amenities, evidenced by the success of recent housing developments for both sale and rental in the vicinity.
- **Rapid Population Growth:** The local population has grown significantly, increasing by approximately 36% since 2016 to an estimated 26,244 residents (CSO, 2022). This trend is expected to continue, supported by substantial new housing delivery.

- **Future Residential Development Pipeline:** Approximately 2,300 new homes are proposed within the immediate Clongriffin Town Centre area, with additional schemes under construction nearby. These include 397 homes by Bluemont/Respond on Hole in the Wall Road, 730 homes by Cairn at Parkside, and 258 homes by Kajima & Bartra at Belmayne, alongside further units planned on the subject lands.
- **Young Demographic Profile:** CSO data indicates a youthful population, with 36% under the age of 25 and 54% under the age of 35 (CSO, 2022), which has implications for retail and leisure demand.
- **Existing Retail Provision:** The area is currently served by a mix of retail facilities, primarily convenience and supermarket offerings.

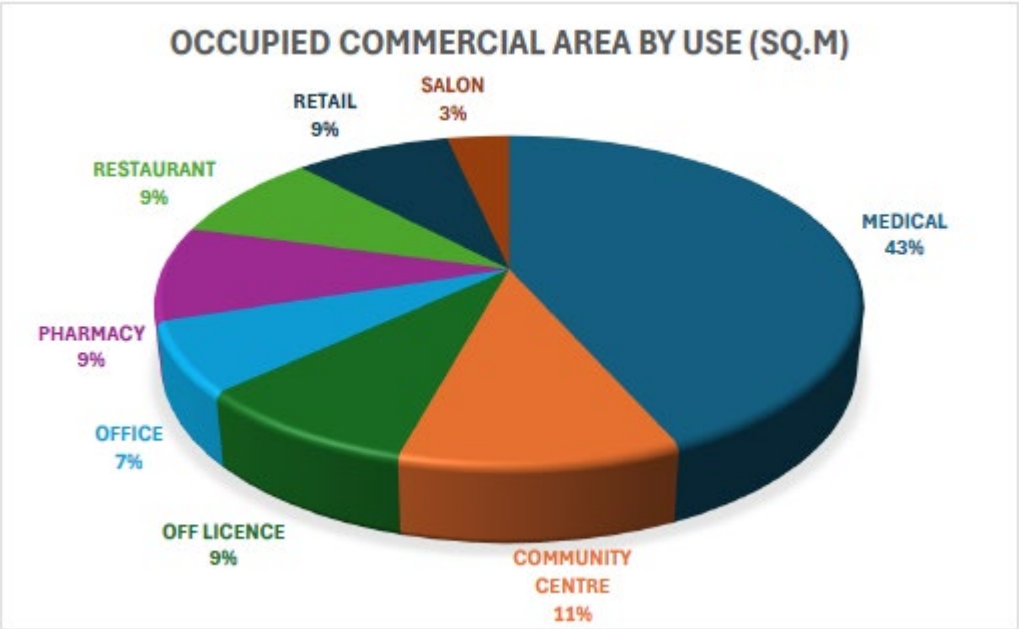
Looking ahead, continued population growth is likely to drive increased demand for retail and neighbourhood services. However, this demand must be carefully managed and curated to ensure a balanced and sustainable mix of uses.

Current Retail Provision

The buildings located along both sides of Main Street, Clongriffin, are identified as Blocks 1, 2, 20, 21, and 22. These multi-storey blocks, completed between approximately 2003 and 2006, primarily comprise ground-floor retail and commercial units with residential apartments and duplexes above.

In addition, two further buildings—Blocks 12 and 16—are situated closer to Clongriffin Train Station. These also provide commercial accommodation at lower levels, with residential units above and, in the case of Block 12, a multi-storey car park.

Across these blocks, the existing commercial accommodation consists of 43 individual units, extending to a total of approximately 14,419 sq. m (155,205 sq. ft). Of these, 14 units are currently occupied, accounting for 1,757 sq. m (18,912 sq. ft). The current occupier mix includes a convenience store (Centra), a pharmacy, six medical-related units (including a medical centre, veterinary hospital, and care facilities), a restaurant, an off-licence, a barber, and an auctioneer's office. Dublin City Council also occupies two units as community centres. A detailed breakdown of the occupied floor area by use is provided below.



The remaining 29 units across Main Street and Blocks 12 and 16 are vacant, representing a total of 12,662 sq. m (136,293 sq. ft). Under the existing planning permission, these units are designated for a range of uses, including offices, retail (with provision for an anchor unit), bars, restaurants, cafés, salons, financial and

professional services, gym and leisure facilities, as well as additional medical and community centre accommodation. A breakdown of the vacant area by proposed use classification is summarised below.

Use Type	Vacant Commercial Area by Planned Use Sq.M
COMMUNITY CENTRE	101
OFFICE	4,912
FINANCIAL /PROFESSIONAL SERVICES	418
GYM / LEISURE	690
SALON	64
RETAIL	2,184
MEDICAL	140
RETAIL ANCHOR UNIT	2,900
BAR / CAFÉ / RESTAURANT	1,253
TOTAL	**12,662**

The most significant progress that has been made recently is in relation to Block 12, where it appears a tenant has been secured for the anchor for the large ground floor area based on a recent planning permission which was submitted (Application Ref: WEB1649/26) in March this year by Gerard Gannon, for the following:

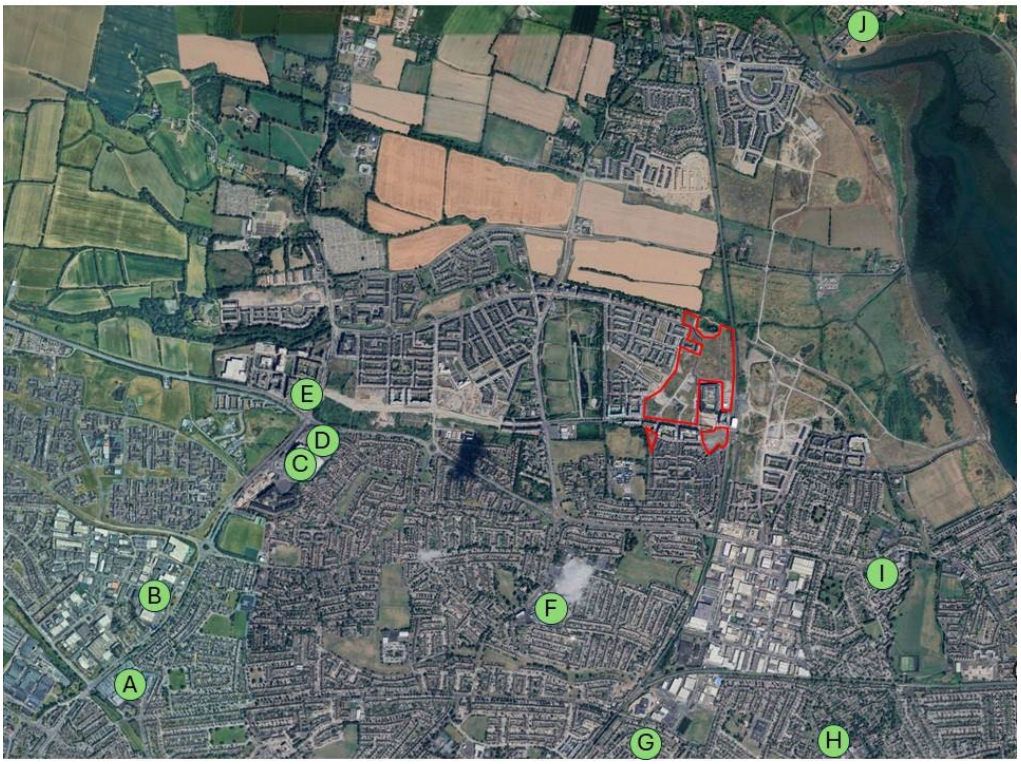
"The development will consist of: (i) the provision of an ancillary off-licence sales area of c. 146 sq.m within the vacant ground floor supermarket unit (as per Reg. Ref. 5945/04); (ii) minor external alterations including a new bi-parting entrance door, anchor unit signage and car park directional signage; (iii) internal alterations including internal fit out works to back of house/delivery area, demolition of internal walls to facilitate the provision of new customer entrance lobbies at both ground and upper ground floor car park levels and customer welfare facilities; (iv) rearrangement and alterations to the existing car park layout at ground floor level to include the provision of 2 no. dedicated "Click and Collect" car spaces, parent and toddler and accessible car parking spaces; (v) associated plant area to be provided at roof level; and (vi) all ancillary site services and site development works".

As can been seen this is mainly a tidy up permission but is a significant step forward in reducing the overall commercial vacancy and in regenerating the centre of this development. Once occupied and trading, the overall vacancy level will reduce by approximately 23%.

Noting this improvement, a substantial quantum of commercial space (9,762 sq. m / 105,077 sq. ft) will remain available to let, highlighting the need to be prudent in the delivery of any further commercial spaces.

Competing Centres

Within a relatively short distance of this site there are quite a number of significant retail centres all competing with this location:



No	Scheme Name	Key Tenants
A	Leisureplex, Coolock	Odeon Cinema / Power City / Burger King
B	Malahide Retail Centre	Lidl / Woodies / Halfords / McDonalds / Maxi Zoo
C	Clarehall Shopping Centre	Tesco / McCabes Pharmacy / O'Sullivan Opticians / Kays Kitchen / EIR
D	Clarehall Retail Centre	Energie Fitness / Dealz / Mr Price
E	Northern Cross Retail	Fresh / Meadows & Byrne / Bank of Ireland
F	Donaghmede Shopping Centre	Dunnes Stores / Born / Card Factory / An Post / Cassidy Travel / McCartan Pharmacy
G	Kilbarrack Shopping Centre	Tesco / Clannad Medical Centre, Stacks Pharmacy
H	Bayside Shopping Centre	Aldi / Centra / Bayside Barbers
I	Racecourse Shopping Centre, Baldoyle	Lidl
J	Strand Road, Portmarnock	Lidl

For context, the above analysis underscores the intensity of competition within the retail and commercial landscape surrounding the subject site. This competitive environment is evident not only in the relatively short travel distance to a wide range of alternative destinations but also in the significant concentration of occupiers offering similar use types.

These occupiers are predominantly convenience-driven and service-oriented businesses—such as grocery stores, cafés, personal care services, and quick-service food outlets—which cater to day-to-day needs rather than destination shopping.

The proliferation of these formats can suggest a saturated market for basic convenience and service offerings, creating a challenging environment for differentiation and long-term sustainability unless the proposed scheme introduces an alternative proposition or complementary use that addresses as yet unmet demand.

Proposed Retail / Commercial

Through an iterative design process informed by established retail planning guidance and market assessment, the development team has prepared a layout that delivers an appropriate scale of development, taking full account of planning considerations, existing commercial provision, and the competitive retail context of the catchment.





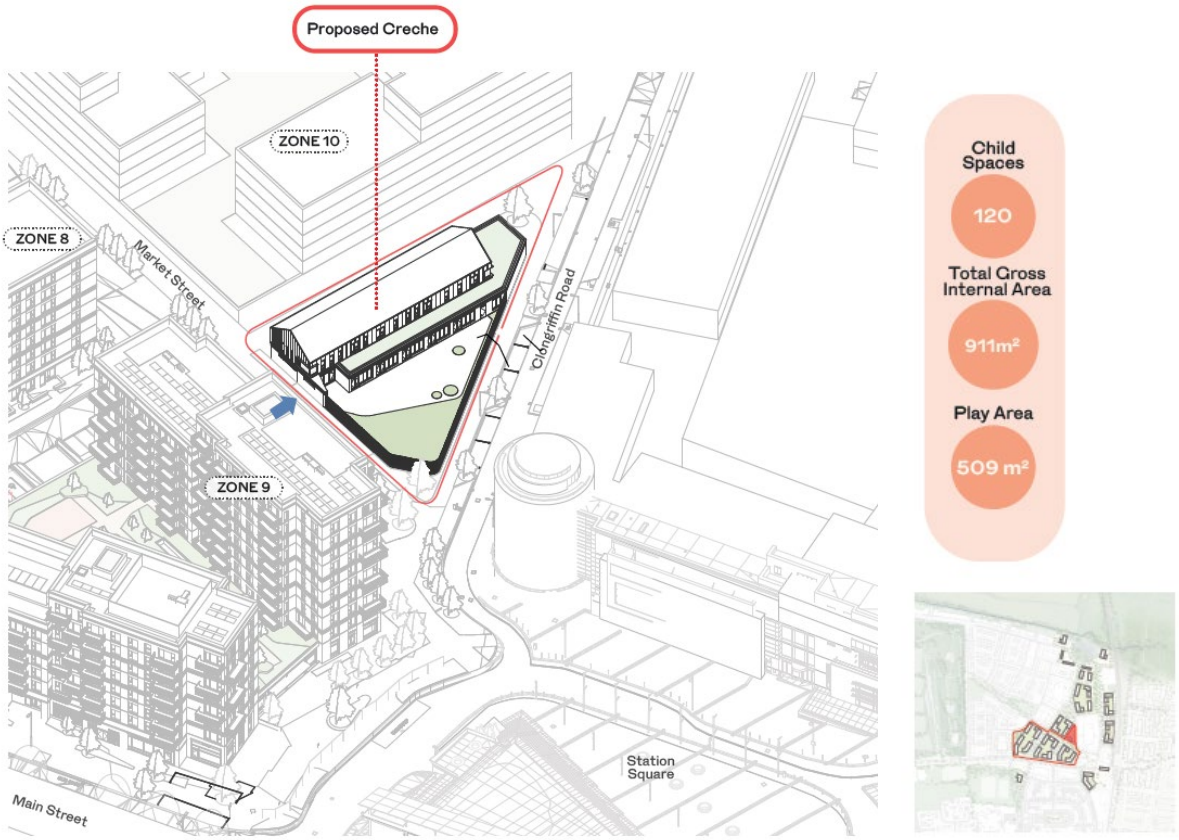
It is considered prudent to focus the future retail into Station Square, creating a central hub of activity for the overall development and providing a central core in the heart of both the Clongriffin and Baldoyle / Stapolin lands, anchored by large retail in Block 12 (under new planning permission), the train station and the significant underground car parking. The 622 sq.m above earmarked as retail are identified in the planning as retail / restaurant / café to cater for future flexibility.

On this principal the retail is a concentration of c 750 sq. m 8,073 sq. ft facing into Station Square. This space would be capable of sub-division to maximise flexibility from an end user point of view. The target end users for this space are in all likelihood retail / restaurant / café uses. These which will add vibrancy to the square area, as well as retailers who will “piggy back” on the proposed anchor opening in Block 12 and the increased residential delivery and need for amenity.

The remainder of Blocks 7 and 8 has been identified for community, cultural and arts-related purposes but could easily be adopted to other retail / commercial uses should the requirement for community, cultural and arts-related uses be accommodates elsewhere within the development in the future. As an example these units are equally suitable for medical and healthcare services, for which there is increasing demand across a range of disciplines including GPs, physiotherapists, chiropodists, and dental practices.

These spaces are located on the opposite side of the street to the existing commercial provision on Main Street, ensuring that the same uses are not duplicated on both sides. This approach supports a more balanced distribution and integration of amenities and services across the area, while maintaining an active frontage along Main Street. It is envisaged that these units will primarily serve local and community-based needs, as they are expected to generate less demand for on-street parking.

Additionally, the recommendation is to prioritise a larger creche facility (see below) within the development to respond more effectively to the changing demand coming from operators in the sector for larger facilities as opposed to smaller 250 sq.m sized units where demand is considerably more limited.



Conclusion

In conclusion, the recommended strategy for retail and commercial development is establishing a clear and coherent hub to serve the Clongriffin and Baldoyle/Stapolin communities. Station Square is identified as the most appropriate focal point, underpinned by strong fundamentals including the existing rail station, the concentration of retail accommodation within Block 12, and the provision of underground parking, all of which combine to create a highly accessible and legible centre.

Block 12 plays a pivotal role in this strategy and the forthcoming supermarket will be integral to the success of this.

While current vacancy levels indicate an underperforming retail environment, this also presents a valuable opportunity for repositioning. The introduction of a new, fresh, south-facing ground floor retail offering, set back from Main Street, will significantly improve visibility, daylight penetration and overall quality of the commercial frontage. This enhanced environment is well suited to café, restaurant and food-led uses, creating active edges and encouraging longer dwell times throughout the day, which will provide a vibrancy to the square area, which is currently missing.

The development of Station Square as a true centre is dependent not only on retail provision, but on the creation of places where people can meet, linger and interact. The integration of cafés, coffee shops and local services is essential in supporting daily activity and fostering a sense of place. These uses provide natural areas for congregation, activate the public realm and help establish a vibrant street-level experience that extends beyond traditional shopping hours.

Further strengthening Station Square with complementary community and medical services will improve convenience, visibility and accessibility for residents, while generating consistent footfall to support surrounding commercial uses. Together, these elements will reinforce Station Square as an integrated destination within the development and lay the foundations for a sustainable, well-functioning urban centre that serves the wider community both economically and socially.

To conclude, the focused strategy for the retail and commercial aspect of this development is to establish a central hub serving the Clongriffin and Baldoyle/Stapolin sites. It is recommended that Station Square as this focal point, leveraging key drivers such as the train station, the significant retail offering in Block 12, and the underground parking facility—all located within this area.

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