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RETAIL / COMMERCIAL REPORT

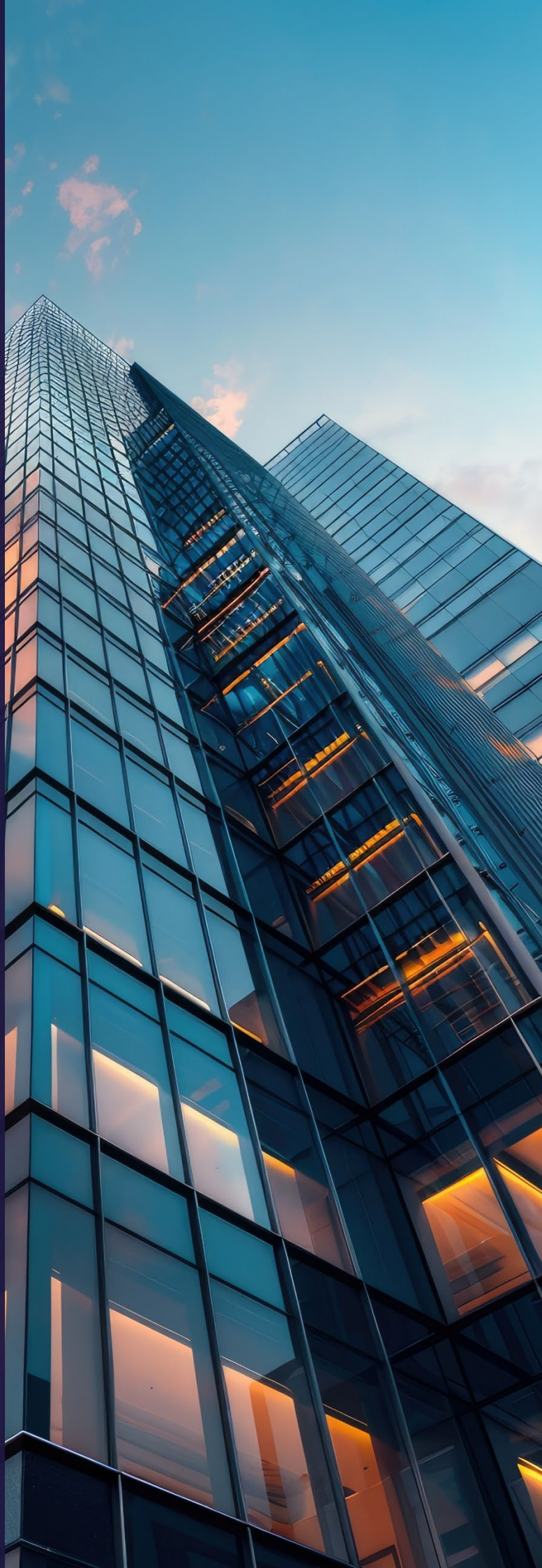
Esker Square – Royal Liver, Dublin 12

PREPARED FOR

The Land Development Agency

REPORT DATE

September 2026



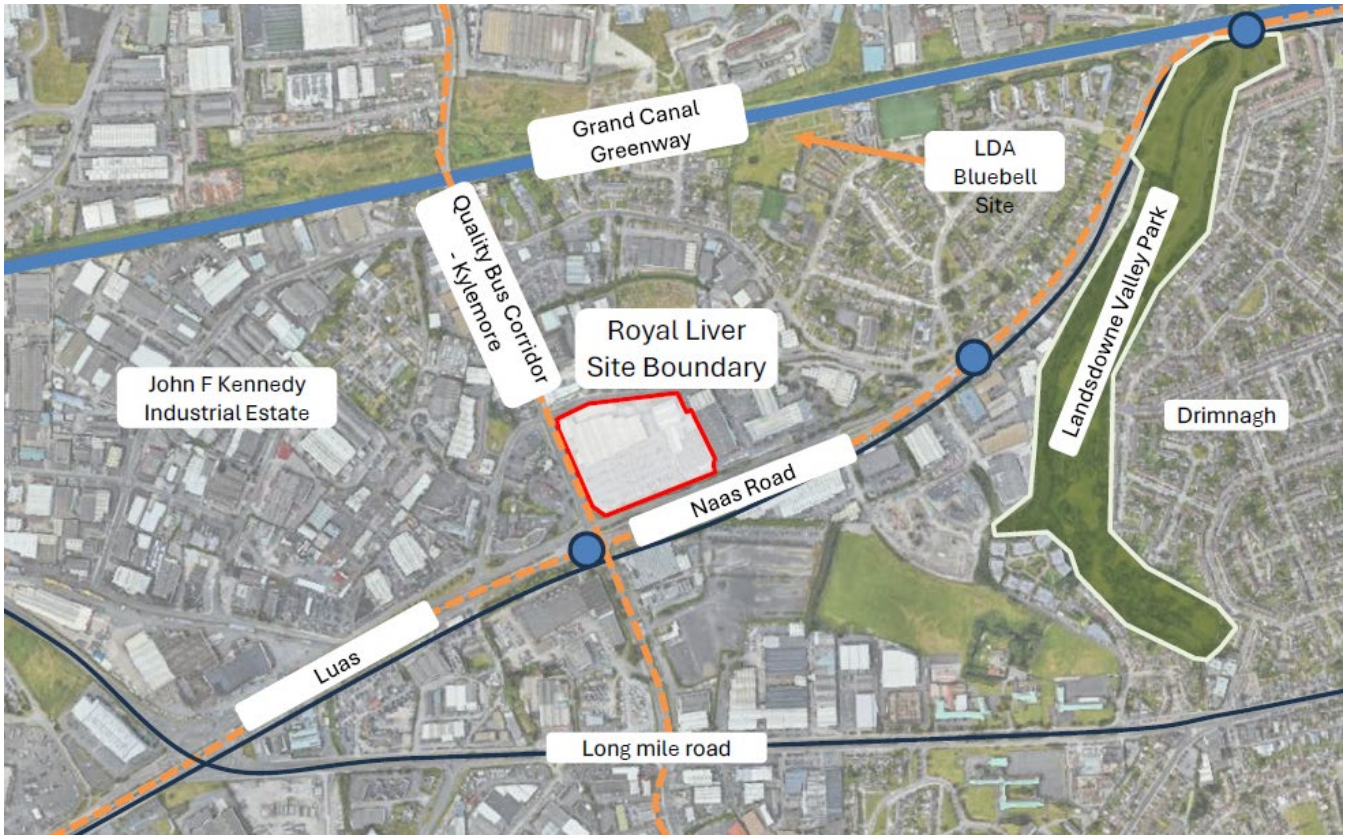
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Overview

- This report outlines below our recommendations and justification in relation to the retail and commercial aspects of Esker Square, Royal Liver, Dublin 12. The advice within this document takes regard of the existing provision (retail & commercial) in the immediate vicinity of the site and within the catchment area.



Please note the site outlined for illustrative purposes only.

Location

The following are the key characteristics of the location:

- Strategic Transport Connectivity:
  The site is positioned along the Naas Road (N7), one of Dublin's main arterial routes, providing direct access to Dublin City Centre (c. 6 km) and the M50 motorway. The area is well served by multiple Dublin Bus routes, while the nearby Red Line LUAS (Kylemore, Bluebell, and Red Cow stops) ensures efficient public transport connectivity to the city centre and Docklands.
- Access to Major Employment Hubs:
  The Naas Road corridor is a long-established commercial and employment location, hosting a wide range of industrial, logistics, and office occupiers. The site benefits from proximity to key employment centres including Park West Business Park and the broader M50 corridor, as well as ease of access to Dublin City Centre.
- Established Commercial and Mixed-Use Environment:
  The surrounding area comprises a mature mix of commercial, light industrial, hospitality, and retail warehouse uses. This established base is complemented by ongoing regeneration and intensification of

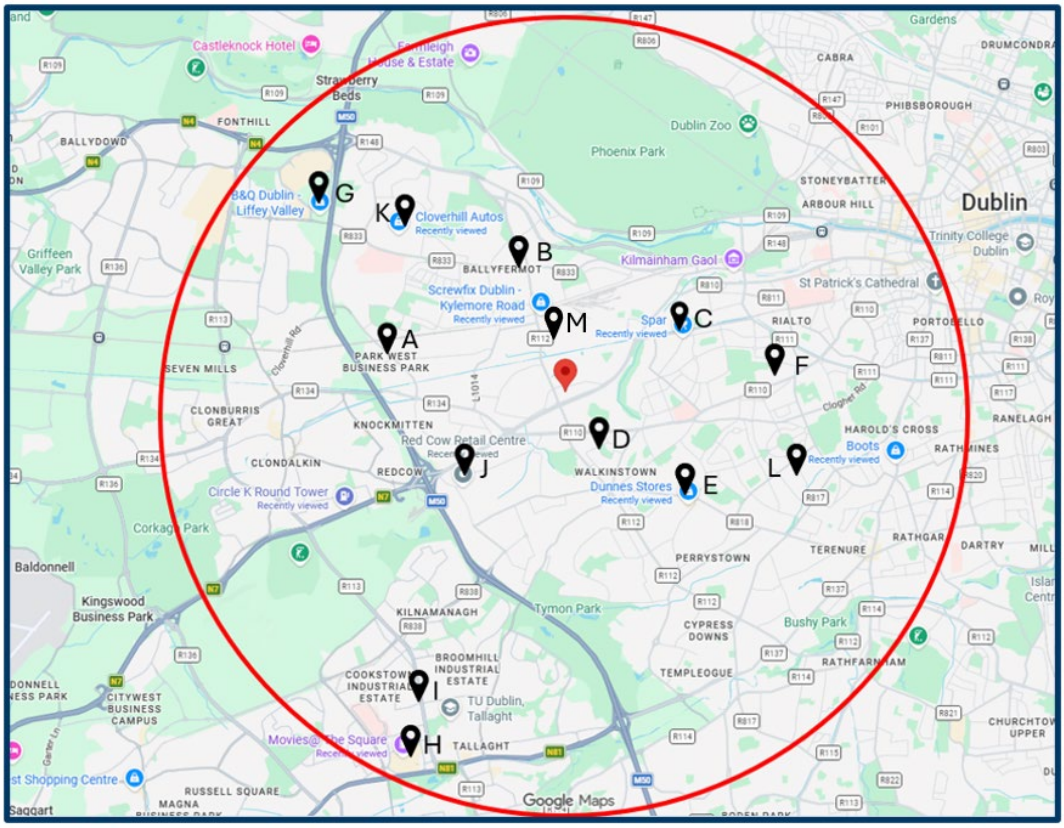
land uses along the Naas Road corridor, with a growing emphasis on higher-density and mixed-use development.

- Public Transport and Future Mobility Enhancements:
  In addition to existing LUAS and bus services, the location is likely to benefit from continued investment in sustainable transport infrastructure, including BusConnects corridors along the Naas Road, which will further enhance accessibility and reduce journey times to key destinations.
- Residential Catchment and Growth Potential:
  While historically employment-led, the Naas Road corridor is increasingly supported by expanding residential communities in surrounding areas such as Inchicore, Ballyfermot, Bluebell, Clondalkin, and the broader South-West Dublin area. Emerging residential schemes and urban regeneration initiatives are strengthening the local catchment population.
- Ongoing Regeneration and Intensification:
  Dublin City Development Plan policy supports the transformation of the Naas Road corridor into a more sustainable, mixed-use urban quarter. This includes opportunities for increased building heights, enhanced public realm, and a broader mix of residential, commercial, and amenity uses.
- Accessibility for Vehicular and Logistics Uses:
  The site's immediate access to the N7 and proximity to the M50 motorway provides excellent connectivity for vehicular traffic, including freight and servicing, making it highly attractive for commercial occupiers requiring regional or national distribution access.
- Retail and Amenity Provision:
  The area benefits from a range of existing retail warehouse parks and local convenience offerings, with larger retail destinations such as Liffey Valley Shopping Centre and The Square Town Centre Tallaght located within a short drive. However, there remains potential for more localised, service-oriented retail and food & beverage provision to support both employees and residents.

Looking ahead, the continued regeneration of the Naas Road corridor, combined with improved public transport and a growing residential base, is expected to drive demand for a more diverse mix of commercial and amenity uses. Careful planning and placemaking will be essential to ensure a balanced, vibrant, and sustainable urban environment at this strategic location.

Competing Centres

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



Map	Scheme / Area	Distance	Key Tenants
A	Parkwest Business Park	3.1 km	Spar, Insomnia, Parkwest Pharmacy, Energie fitness club, Giraffe
B	Ballyfermot	2.1 km	Tesco, Spar, Paddy Power
C	Drimnagh	2.6 km	Spar, Drimnagh Pharmacy, Galtymore Allcare Pharmacy, An Post, DHL
D	Long Mile Road/ Walkinstown	1-2 km	Aldi, Lidl, Supervalu, Polonez, Eddie Rockets, Subway, Woodies, DID Electrical
E	Ashleaf SC	2.9 km	Dunnes Stores, Flyefit, Eir
F	Crumlin SC	3.7 km	Dunnes Store
G	Liffey Valley	7.3 km	Penneys, M & S, Zara, JD Sports, Dunnes Stores, Boots, Vue Cinema
H	The Square	7.7 km	Tesco, Penneys, JD Sports, Boots, Costa, Movies @
I	Belgard Retail Park	6.1 km	Homestore & More, Dealz, B & Q, Halfords, Starbucks, EZ Living
J	Red Cow Retail Centre	2.4 km	Circle K, Dublin Harley-Davidson, X music
K	Cloverhill, Upper Ballymount	3.7 km	Lidl, Applegreen
L	Sundrive Road	4.5 km	Supervalu, O'Briens, Mace
M	Kylemore Road	1 km	Aldi

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. This is complimented by more piecemeal retail warehouse type retailing along the long mile road and surrounding areas. With regards to the destination type centres these are located along the M50 and are not considered a direct competitor for the nature of this scheme.

Proposed Retail / Commercial

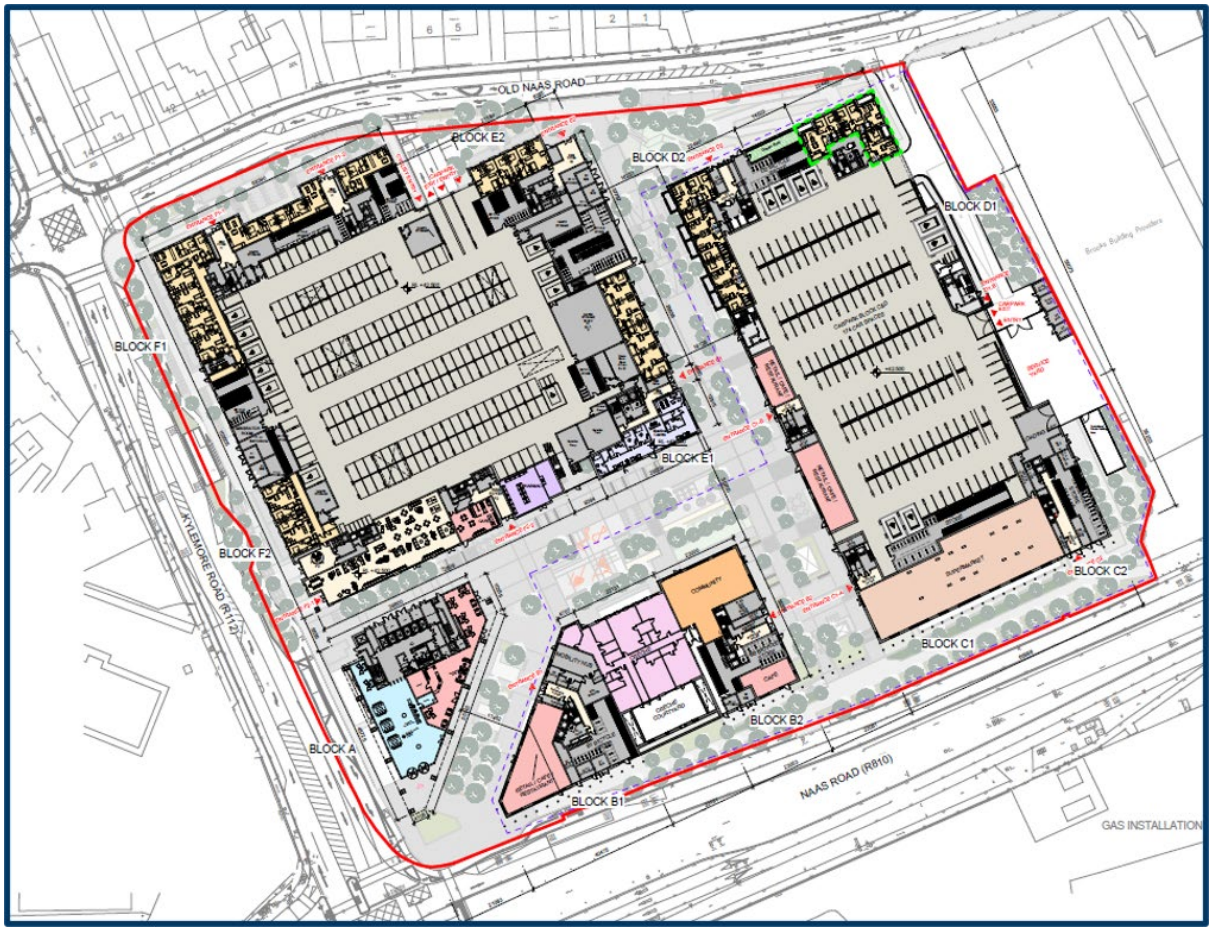
The development team has prepared a layout for this site that delivers an appropriate scale of development, taking full account of planning considerations, existing commercial provision, and the competitive retail context of the catchment.

The retail and commercial elements of the scheme have been deliberately arranged along the Naas Road frontage to maximise visibility, strengthen the development's identity, and generate a strong sense of activity along this key arterial route. This approach not only enhances passing trade opportunities but also contributes to placemaking, creating an active edge that reinforces the commercial character of the corridor.

In terms of the provision of commercial / retail at the ground level this can be broken down on the table below as follows:

Block	Description	Phase	Area (Sq.M)
E1	Medical Centre	1	226
E1	Pharmacy	1	126
F2	Café	1	86
F2	BTR Amenity	1	385
C1	Retail / Café / Restaurant	2	92
C1	Retail / Café / Restaurant	2	161
C1	Supermarket	2	847
B2/B1	Crèche	2	600 & 156 External*
B2	Retail / Café / Restaurant	2	97
B2	Community	2	330
B1	Retail / Café / Restaurant	2	282
A	Café / Restaurant	3	290

*see separate drawing below



Map - Overall Ground Floor Arrangement

Within the scheme, approximately 352 sq.m has been specifically allocated to pharmacy and medical centre uses. These uses are considered highly complementary, both in operational terms and in their ability to generate consistent, repeat footfall throughout the day. The co-location of healthcare-related services is expected to create a convenient and accessible local hub, supporting both the immediate population and the wider catchment area, while also underpinning the viability of adjoining units.

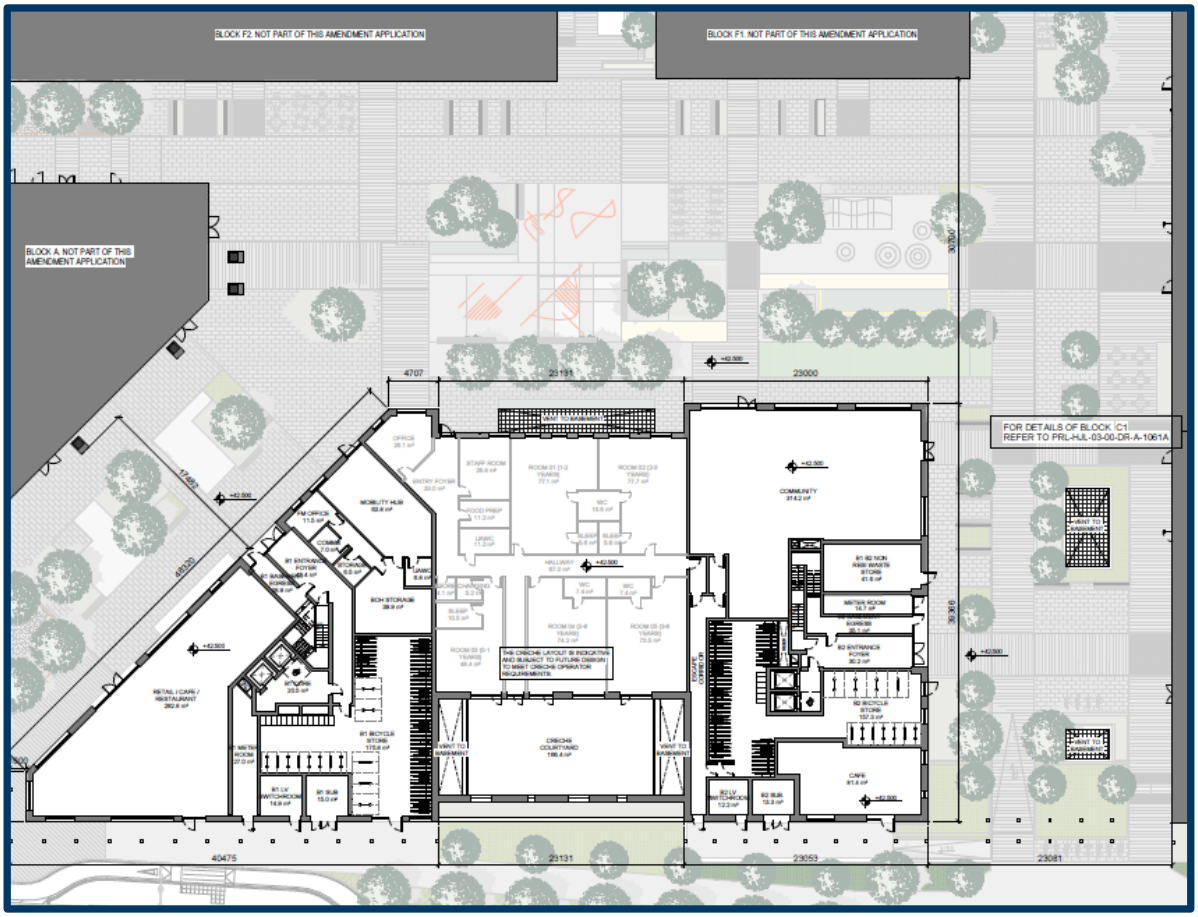
The proposed convenience store extends to approximately 847 sq.m. The unit benefits from an embedded customer base generated by the residential accommodation within the scheme, together with additional demand from the surrounding neighbourhood. At this size & scale, the store is capable of accommodating a comprehensive convenience retail offer, including fresh food, grocery, food-to-go and ancillary services, providing a strong platform for both national and regional operators. The provision of a convenience anchor within the development also enhances the overall placemaking objectives of the scheme by providing an essential amenity for residents while contributing to the vibrancy and sustainability of the wider neighbourhood centre at this size.

A further 1,008 sq.m has been designated for a flexible mix of retail, café, and restaurant uses, allowing the scheme to respond to evolving occupier demand and market conditions. This flexibility is a key strength, enabling the accommodation of a diverse tenant mix over time. It is anticipated that these units will primarily attract service-oriented and experience-driven operators, such as hair and beauty providers, coffee shops, casual dining outlets, and other retail concepts, all of which align with modern consumer preferences for convenience, social interaction, and lifestyle-focused services. Collectively, these uses will contribute to increased dwell time and enhance the overall vibrancy of the scheme.

In addition to the commercial provision, a key recommendation of the scheme is the inclusion of a larger-format crèche facility, reflecting a notable shift in operator requirements within the childcare sector. Demand

has increasingly moved away from smaller units (typically in the region of 250 sq.m), which can be operationally constrained, towards larger, purpose-designed facilities that allow for greater capacity, improved layouts, and enhanced outdoor space provision.

In response to this trend, the proposed development incorporates a 600 sq.m crèche facility, complemented by a 156 sq.m dedicated external courtyard. This scale is considered more aligned with current market expectations and operator preferences, providing the opportunity to deliver a high-quality childcare offering that meets regulatory standards while also appealing to parents seeking modern, well-equipped facilities. The final important factor is easily accessible drop off parking for parents and 3 spaces will be required for the creche of this size. Furthermore, the inclusion of a crèche adds an important community-focused dimension to the scheme, supports local employment, and strengthens the development's role as a mixed-use destination serving both working and residential populations in the area.



Proposed creche layout

Handover Condition – Commercial

The units should be delivered in shell and core condition with capped services terminating at the rear of each unit. This would apply to the creche facility also as each operator applies different layouts. Shopfronts should also be included across all units. This approach ensures consistency in design and enhances the overall aesthetic and brand experience of the scheme. It also mitigates a common issue whereby tenants underestimate the cost and lead time associated with shopfront installation. Delivering shopfronts is increasingly considered market standard for schemes of this nature. Additionally ensuring the requisite level of services, such as required power are available.

Parking Provision

Adequate customer parking is a critical component in supporting the viability and performance of the proposed retail accommodation within this scheme. While the development will benefit from an on-site residential population and opportunities for linked trips, convenience retail and other commercial uses will remain dependent on a readily accessible parking provision to facilitate regular customer visits, particularly for larger basket shops and users travelling from the wider catchment area.

The proposed provision of 34 parking spaces represents the minimum level necessary to adequately support the scale and nature of the retail uses envisaged. Any reduction below this level could adversely affect the attractiveness, convenience and trading performance of the retail units, potentially constraining occupier demand and limiting the commercial viability and success of the scheme. Maintaining an appropriate level of parking is therefore important not only to support the day-to-day operational requirements of the retail element but also to ensure the development functions effectively as a sustainable mixed-use destination serving both residents and the wider community.

LRD Opinion

1. Planning Issues - (i).

While the Planning Authority welcomes the active frontage and the inclusion of additional retail units at the corners of Blocks B1 and B2, however concerns are raised regarding the significant reduction in the overall supermarket floorspace compared to the previously permitted scheme. The Applicant is requested to review the retail strategy and examine opportunities to increase the supermarket footprint to ensure an appropriate level of retail provision for the future community**.**

Response:

The proposed reduction from the previously approved large-format convenience store of over 2,000 sq.m to a smaller-format retail unit is considered both appropriate and necessary, having regard to the operational requirements of modern food retailing and the physical constraints of the site. Convenience stores of this scale typically serve a wider catchment area and require a significant level of customer parking, usually in excess of 100 spaces, to support customer demand and retailer operational expectations. Such a level of parking cannot be satisfactorily accommodated within the site without compromising other key development objectives and exceeding Development Plan standards. In this context, the originally approved store size is no longer considered an optimal or deliverable solution.

The proposed store format represents a more sustainable and commercially realistic retail model, reflecting contemporary retailer requirements while continuing to provide a strong convenience offering for the local catchment. Retail operators commonly trading from stores of a comparable scale include Tesco Metro/Local, larger Spar stores, and Musgrave Group brands such as Centra and smaller-format SuperValu stores. These formats are well-established in serving day-to-day shopping needs, providing a broad grocery offer and associated services while operating successfully with a more proportionate level of parking and site infrastructure. Accordingly, the revised retail strategy better aligns the scale of development with both market demand and the practical characteristics of the site, whilst ensuring the delivery of a viable and attractive retail offering for the surrounding community.

Conclusion

In conclusion, the proposed retail and commercial strategy for Esker Square represents a measured and sustainable approach that is appropriately aligned with the characteristics of the location, the scale of the residential development, and the competitive retail environment within the wider catchment. Rather than seeking to compete with the established district and destination centres located nearby, the focus should be on creating a high-quality local centre that provides residents and workers with convenient access to essential day-to-day services and amenities.

Central to this strategy is the delivery of the 847 sq.m convenience store, which will act as the principal anchor and primary footfall driver for the scheme. Supported by the pharmacy, medical centre, crèche and a complementary mix of café, restaurant and service-led retail uses, the development has the potential to establish a vibrant and functional neighbourhood hub that serves both the immediate population and the surrounding area. The proposed tenant mix has been carefully considered to maximise convenience, generate repeat visitation and create activity throughout the day, thereby supporting the long-term sustainability of the commercial element.

Equally important is the concentration of the commercial accommodation along the Naas Road frontage, where visibility, accessibility and exposure to passing traffic are maximised. This positioning will strengthen the identity of the development, enhance its sense of arrival and create an active frontage that contributes positively to the ongoing regeneration and evolution of the wider Naas Road corridor.

The success of the retail and commercial offering, however, will be dependent on ensuring that the supporting infrastructure is delivered in tandem with the commercial accommodation. In particular, the provision of customer parking is fundamental to the operation of the convenience store and associated retail uses. The proposed 34 customer parking spaces should therefore be regarded as the minimum level required to support the scheme and to ensure its attractiveness to both occupiers and consumers. Any reduction in this provision risks undermining trading performance, occupier demand and ultimately the commercial viability of the retail element.

Overall, the proposed mix of convenience retail, healthcare, childcare, food and beverage, and local services is considered appropriate and proportionate for a development of this nature. When combined with adequate parking provision, high-quality public realm and a coordinated leasing strategy, Esker Square has the potential to evolve into a successful neighbourhood centre and an important amenity destination within the wider Naas Road corridor, delivering both commercial sustainability and meaningful community benefit over the long term.

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