COUNTY MONAGHAN RETAIL STRATEGY 2016 – 2022

March 2016

Comhairle Contae Mhuineachain
Monaghan County Council

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1.0 Introduction

1.1 Purpose of Retail Strategy

This Retail Strategy has been prepared in accordance with the provisions set out in the 'Retail Planning Guidelines for Planning Authorities' (Department of Environment, Community and Local Government (DECLG), 2012).

The overriding aim of the strategy is to create the appropriate conditions necessary to foster a healthy and vibrant retailing environment in County Monaghan over the period of the strategy. It does so through policy recommendations which are framed in the context of national and regional plans, strategies and guidelines. The strategy provides important information on the quantum, scale and types of retail development required over the period to 2022.

1.2 Methodology

This strategy has been prepared following an economic downturn and currently at a stage of modest economic upturn. For this reason there is a need for flexibility with regard to the quantum floorspace. The current retail climate is uncertain and has undergone extensive change in the way people make purchases. Traditional shopping areas have high vacancy rates and difficulties with access to credit.

The key requirements of this retail strategy are to:

- Confirm the retail hierarchy
- Undertake health check appraisals of the main retail centres of the towns of Monaghan, Carrickmacross, Castleblayney, Clones and Ballybay, to inform the need for interventions
- Identify the broad requirement for additional retail floorspace over the plan period
- Identify policies to support the continued development of the retail sector

1.3 Types of Retail Goods

The Retail Planning Guidelines, 2012, defines a goods-based retail classification. Retail goods categories can be divided into convenience goods and comparison goods, as follows:

Convenience Goods: food; alcoholic and non-alcoholic beverages; tobacco; non-durable household goods (includes goods from all supermarkets, smaller convenience stores and retail food outlets, excluding fast food takeaways, restaurants and cafes)

Comparison Goods: clothing and footwear; furniture, furnishings and household equipment (excluding non-durable household goods); medical and pharmaceutical products, therapeutic appliances and equipment; educational and recreation equipment and accessories; books, newspapers and magazines; goods for personal care; goods not elsewhere classified;

Bulky Goods: Goods generally sold from retail warehouses where DIY goods or goods such as flatpack furniture are of such size that they would normally be taken away by car and not be portable by customers travelling by foot, cycle or bus, or that large floorspace would be required to display them, e.g. repair and maintenance materials; furniture and furnishings; carpets and other floor coverings; household appliances; tools and equipment for the house and garden, bulky nursery furniture and equipment including perambulators; bulky pet products such as kennels and aquariums; audio-visual, photographic and information processing equipment; catalogue shops and other bulky durables for recreation and leisure (this list is not exhaustive – bulky goods not mentioned in the list should be dealt with on their merits in the context of the definition of bulky goods)

1.4 Context of Retail Hierarchy

The purpose of this section is to review the relevant policy documents that will influence the future development of the retail sector in the County. Current and emerging plans, policies and proposals that are relevant to the review of the Retail Strategy are identified in the following order:

- National
- Regional
- Local

1.4.1 National Policy Context

National Spatial Strategy 2002 – 2020

The National Spatial Strategy (NSS) is a strategic framework with the aim of achieving more balanced social, economic and physical development and population growth between the regions. The NSS introduced the concept of gateways and hubs; with Monaghan being identified as a hub to drive development in the region. The NSS states that towns like Carrickmacross and Castleblayney can promote themselves more effectively in the context of the strength of Dundalk and Monaghan. A successor to the NSS is currently being developed to provide for a spatial framework complementing wider efforts to support long-term national economic recovery. A new national planning framework will reflect the economic outlook from now to the end of this decade that sees Ireland attempting to move from fragile recovery to sustained renewal, as it addresses the challenges of achieving sustainable long-term economic stability and growth.

Retail Planning Guidelines for Planning Authorities, 2012

The Retail Planning Guidelines, 2012, were published in April 2012 by the DECLG and replace the Retail Planning Guidelines, 2005. The purpose of the Retail Planning Guidelines is to promote sustainable retail development, by assisting Planning Authorities in addressing retail development, preparing development plans and assessing applications for retail developments. They also guide retailers and developers in formulating retail development proposals.

The Guidelines emphasise that enhancing the vitality and viability of town centres in all their functions through sequential development is an overarching objective in retail planning. The Guidelines include a presumption against large out-of-town retail centres, in particular those adjacent to or close to existing, new or planned national roads/motorways.

The Guidelines have five key policy objectives:

1) Ensuring that retail development is plan-led;
2) Promoting city/town centre vitality through a sequential approach to development;
3) Securing competitiveness in the retail sector by actively enabling good quality development proposals to come forward in suitable locations;
4) Facilitating a shift towards increased access to retailing by public transport, cycling and walking in accordance with the Smarter Travel Strategy; and
5) Delivering quality urban design outcomes.

The Guidelines emphasise that in order to ensure proper planning and sustainable development, retail development and activity must follow the settlement hierarchy of the State, including Gateway and Hub town locations identified in the NSS, the Regional Planning Guidelines and the Core Strategies of development plans.

The Guidelines also provide specific guidance for the content and role of Development Plans:

- Development Plans must set out clear evidence-based policies and objectives in relation to retailing in a discrete section of the Plan;
- Joint or multi-authority retail strategies, where required, will guide the preparation of retail policies and objectives in the relevant development plans;
- The need for any additional retail warehousing should be carefully assessed in view of the significant levels of recent provision and potential impacts on vitality and viability of city and town centres;
- At a minimum, County Development Plans must:
    - State the elements of their settlement hierarchy in line with the relevant regional planning guidelines their core strategy;
    - Outline the level and form of retailing activity appropriate to the various components of the settlement hierarchy in that core strategy;
    - Define, by way of a map, the boundaries of the core shopping areas of city and town centres and also location of any district centres;
    - Include a broad assessment (square metres) of the requirement for additional retail floorspace only for those plans in the areas covered by a joint multi-authority retail strategy;
    - Set out strategic guidance on the location and scale of retail development to support the settlement hierarchy, including where appropriate identifying opportunity sites which are suitable and available and which match the future retailing needs of the area;
    - Identify sites which can accommodate the needs of modern retail formats in a way that maintains the essential character of the shopping area;

- Include objectives to support action initiatives in city and town centres, such as mobility management measures that both improve accessibility of retail areas, while aiming to develop a pedestrian- and cyclist-friendly urban environment and vibrant street life;
- Include public realm interventions aimed at improving the retailing experience through high-quality civic design, provision of attractive street furnishing, lighting and effective street cleaning/business improvement district type initiatives; and
- Identify relevant development management criteria for the assessment of retail developments in accordance with these guidelines.

1.4.2 Regional Policy Context

Border Regional Planning Guidelines, 2010 – 2022

The Border Regional Planning Guidelines provides planning policy context for the six counties of Cavan, Donegal, Leitrim, Louth, Monaghan and Sligo. The Guidelines are set within the context and framework of the NSS, and highlight that the retail sector is a 'significant sector within the Region that will experience cycles due to currency differentials, but with improved diversity through the development of retailing in key centres, there is potential for more sustainable jobs.'

The Regional Planning Guidelines highlighted that the retail sector had grown significantly over the period 1998-2008, employing 14.7% of the workforce in the Border Region as a whole.

The Guidelines outline that in order to address retail leakage to Northern Ireland, the retail sector in the Border Region will require a regional approach, possibly by the development of a Regional Retail Strategy. The Guidelines include the following policies with respect to the retail sector:

ESP14 *'Direct new retail floorspace into Gateways and Hubs and those centres selected for additional population growth. Future provision of significant retail developments within the Border Region should be consistent with policies and recommendations of the DEHLG Retail Planning Guidelines for Planning Authorities'*

ESP15 *'Develop a Regional Retail Planning Strategy in accordance with the National Retail Planning Guidelines'*

The Guidelines require Planning Authorities reviewing Development Plans to consider the following in developing retail planning policy within constituent counties:

- Retail Planning Guidelines;
- Retail policy as part of wider town centre management issues; and
- Retail vacancies both within town centres and outside town centres.

The Planning Authority will incorporate into its development plan the new Regional Spatial and Economic Strategy (RSES) which is currently under preparation and will replace the Regional Planning Guidelines to set out a strategic development framework at regional level.

1.4.3 Local Policy Context

Monaghan County Development Plan 2013 – 2019 (incorporating the town plans for Monaghan, Carrickmacross, Castleblayney, Clones and Ballybay)

The Development Plan provides a framework to ensure that development and land use within the county reflects the vision of Monaghan as, 'an inclusive, outward-looking, progressive county, which enjoys a diverse, vibrant economy, a sustainable environment and a high quality of life for all.'

The Development Plan includes a Core Settlement Strategy for the county, a settlement hierarchy, acting as a framework for the development of settlements within the county, providing a transparent, evidence based rationale for residential development.

Hierarchy of Settlements

Table 1.1 Hierarchy of Settlements

Settlement Tier	Settlement	Population Potential 2011-2019
Tier 1	Monaghan	7,000 – 10,000
Tier 2	Carrickmacross, Castleblayney	2,500 – 7,000
Tier 3	Ballybay, Clones	1,500 – 2,500
Tier 4	Ballinode, Emyvale, Glaslough, Inniskeen, Newbliss, Rockcorry, Scotshouse, Scotstown, Smithborough, Threemilehouse	200 – 1,500
Tier 5	Annyalla, Carrickroe, Clontibret, Corcaghan, Corduff, Doohamlet, Drum, Knockatallon, Knockconan, Latton, Lisdoonan, Oram, Tydavnet	Up to 300
Tier 6	Dispersed Rural Communities	

Tier 1: Monaghan will be promoted as the primary growth centre for industrial development, as a primary retail and service centre, and a strong and attractive residential centre. Monaghan will aspire to be a third-level education provider and to develop critical mass in support of its 'hub' role as set out in the NSS.

Tier 2: Carrickmacross and Castleblayney provide an extensive range of services including health, community, financial, significant employment and retail. Both towns have a strong historical identity as market towns and have relatively well-developed infrastructure. Sustained growth in these settlements is required.

Tier 3: Clones and Ballybay provide a more limited range of services than Tier 1 & 2 settlements. Service provision often includes a range of retail and educational services, but limited financial health and community services. These towns should be further developed as residential and employment centres as well as service and local retail centres for their surrounding hinterland.

Tier 4: The ten larger villages provide basic services to their community, such as convenience goods and fuel. All of these settlements have public sewerage facilities and tend to have a defined streetscape structure. Education services are provided in some of the settlements, but extend to primary education only. These villages serve an important community purpose and provide the basis for further future development. These villages should be further developed as residential, employment, basic service and convenience retail centres for their surrounding hinterland.

Tier 5: These smaller villages provide basic services to their community, such as convenience goods and fuel. Education services are provided in some of the settlements, but extend to primary education only. These villages serve an important community purpose and provide the basis for further future development. Some of these settlements have experienced expansion over recent years through the construction of housing developments. Others have limited infrastructure that restricts the scale of development within them. In order to preserve the character of these villages, new housing developments shall only be permitted if they are of a size which enables them to be satisfactorily integrated into these villages, and shall be subject to the satisfactory provision of infrastructure and services.

Tier 6: This is the smallest type of settlement. These settlements are referred to as Dispersed Rural Communities (DRC). The character of these settlement areas mirror the rural countryside but have scattered individual houses with some clustering around one or more focal points. Focal points may include existing development around a cross roads, a shop, church, post office, etc. There may be scope for some additional dwellings to consolidate existing focal points and utilise existing services in the area subject to normal planning environmental standards. It is expected that the majority of development taking place in these settlements will be single dwellings. In respect of housing developments, the onus will be upon the developer to justify the demand for the housing proposed, the development shall be centred on the focal point of the settlement, and shall be subject to the satisfactory provision of infrastructure and services.

The Development Plan includes specific retail policies:

RTP 1 *All projects for retail developments shall be considered under policies AAP1 – AAP5 contained within Chapter 4, Environment and Heritage, of the Monaghan County Development Plan 2013 – 2019*

RTP2 *Comply with the provisions of the Retail Development Strategy for County Monaghan 2003, and any subsequent retail strategy, when assessing proposals for retail developments*

RTP3 *To maintain and consolidate existing retail cores by strictly enforcing the 'sequential approach' test to proposed retail development*

RTP4 *To ensure that the location of new retail developments within the County, including supermarkets, petrol filling stations and fuel depots, is appropriate and sustainable*

RTP5 *To ensure the scale and type of retail provision is appropriate for different levels of the retail hierarchy*

RTP6 *To require retail development proposals within towns and villages to make a positive contribution to the general townscape*

1.5 Core Retail Areas

An objective of the Retail Planning Guidelines is the promotion of greater vitality in town centres through the implementation of the sequential approach to ensure the retention of activity within the town centres or ‘core areas’ at the expense of more peripheral edge-of-centre or out-of-centre locations. Core areas are the most suitable locations for comparison goods as they are generally the most accessible for the catchment population and can also access a range of services and amenities also located within the core areas.

For the purposes of this Retail Strategy the ‘town centres’ as defined under the Monaghan County and Towns Development Plans 2013-2019 have been assumed as the ‘core retail areas’ for the towns of Monaghan, Carrickmacross, Castleblayney, Clones and Ballybay. The town centres are deemed to be the focus and preferred location for retail development under this Retail Strategy.

2.0 Retail Trend Analysis and Assessment of Competing Town Centres

2.1 Retail Trend Analysis

The Irish retail sector employs 275,000 people, almost 15% of the total jobs in Ireland, this is the same as the total number of those employed in IT, agriculture, forestry and fishing and the financial and insurance sectors combined. There are 44,000 retail and wholesale businesses in Ireland. Latest figures from 2010 show that the Irish retail and wholesale sector contributed €5.1 billion in taxes to the exchequer. The combined Irish retail and wholesale sector generated €8.2 billion in staff wages in 2010.

The sector has experienced significant job losses, with employment declining by over 40,000 from a peak of 315,000 in 2008.

Retail sales in Ireland have declined by over 25% since their peak in 2008 – the sectors experiencing the largest declines over this period include furniture and lighting (-55%); motor trades (-50%); hardware (-39%) and electrical goods (-38%).

In value terms retail sales are now 10.6% below peak levels in 2007 but are still 5.6% higher than in 2005.

The Consumer Price Index shows that goods inflation in Ireland remains negligible compared to energy products and utilities and local charges.

The KBC Ireland/ESRI Consumer Sentiment Index continues to fluctuate as Irish consumers worry about their financial security.

The domestic economy will return to moderate to strong growth this year – consumer spending was flat in 2013 but it is likely to rise at least 1% during 2014 on the back of growing employment.

(Retail Ireland, 2015)

The effects of the recession has had a negative impact on many towns throughout Ireland, with contracting local economies no longer able to support the retail offer which had developed previously. This has resulted in an increase in vacancy rates within many towns and counties and impacted on the attractiveness of many areas as retail destinations.

Assessment of the Retail Sales Index, published by the Central Statistics Office (CSO) for January 2015, indicates that there had been an increase in the value of national retail sales in 2014. Using a base year of 2005 (=100), the retail sales value index in January 2015 stood at 104.4. This represented an 8.8% annual percentage change, while there was an 8.9% annual percentage change on the previous year 2013, compared to a -1.2% annual percentage on the previous year, 2012.

(CSO Retail Sales Index, January 2015, January 2014, January 2013).

The impacts of the decline in national retail sales and overall economic activity have disproportionately affected independent retailers, many of whom have had higher cost bases than the multiples with which they compete. In the case of convenience retailers, many of the independent retailers who remain are now opting to join the multiple franchise groups.

The Border Region has a unique set of circumstances from the remainder of the country in that the currency differential between the Euro and sterling impacts directly on retailing activity. This retail strategy cannot predict for the effects of the currency differential on the retailing environment.

2.2 The Changing Nature of Retail Services in Ireland

The last decade has seen substantial changes in shopping habits. The continued growth of online shopping is mirroring a shift in consumption patterns. A number of factors driving growth in this sector include consumers' appetite for value for money and greater variety, the increased usage of mobile devices, improved security and convenience, as well as increased marketing and use of social media promoting online campaigns. In Ireland, an estimated 43% of people between the ages of 16 and 74 made purchases on the internet in 2011 (CSO, 2012). With an average expenditure in excess of €1,000 (IMR Smart Knowledge Base, 2011), the most popular online purchases for Irish households in 2011 were 'other travel arrangements' (30%) and holiday accommodation (28%). 20% of online purchases in Ireland were for 'clothes or sports goods' and 14% were in films/music.'

The increase in the number and size of out of town centres since the early 2000s to cater for convenience, comparison and bulky goods, and the multiples, has impacted on the viability of retailing in town centres. These trends, along with economic recession, has resulted in larger increases in the vacancy rates of town centres, as some retailers struggle to survive and others relocate to alternative locations to meet their requirements. Those that remain compete for a shrinking market share as the retail attraction of the town diminishes. Availability of paid parking may also impact on town centre retailers while generally out of town centres do not have pay parking.

The larger multiples have increasingly moved towards the provision of comparison goods in pursuance of greater market share, replacing some small independent retailers, particularly newsagents, confectioners and off-licences. Tesco has recently reclaimed its position as the country's biggest retailer, having lost out to Supervalu recently.

Table 2.1 Grocery Market Share, Ireland, May 2015

Supermarket	Grocery Market Share
Tesco	25.2%
Supervalu	24.8%
Dunnes	21.9%
Aldi	8.6%
Lidl	8.4%
Other outlets	11.1%

(KantarWorldpanel, 24th May 2015)

Convenience retail habits are continually evolving and journey times of half an hour or greater may be considered reasonable for convenience shopping. What were considered ‘discount foodstores’ under the previous Retail Planning Guidelines are now categorised as ‘convenience shops’ within the current Retail Planning Guidelines, 2012. These stores offer alternative choice as consumers spread their convenience shopping between any numbers of different stores. An alternative shopping offer is therefore important if County Monaghan is to reduce retail leakage to other areas, including areas north of the border.

The primary focus of a Retail Strategy is to identify appropriate levels of convenience, comparison and bulky goods floorspace for the catchment areas. However, there is also a need to recognise that other destinations are becoming more accessible as shoppers have benefitted from reduced journey times due to infrastructure improvements and are also willing to travel further. Retail Strategies need also be concerned with competing online retailers and identify measures to support the existing retail base. Town centres need to look at the retail mix, ensuring there are a range of complementary uses and attractions that can create additional footfall and cross-visitation, and to possibly address over-and under-provision of particular services.

The increase in online purchasing may have an impact on future demand for retail floorspace. Some industry experts predict that the need for larger convenience/comparison stores will subside as an upward trend in home deliveries increases. If this trend continues in online shopping, there may be more demand for storage and distribution facilities.

2.3 Assessment of Competing Retail Centres

Accessibility

The retail market is highly competitive and County Monaghan’s roads infrastructure is served relatively well by the national road network and with significant improvements to the network in the last decade, other centres have become more accessible. The travel distances and journey times to County Monaghan’s many competing centres are listed in the table (2.2) below.

Table2.2 Travel distances by road between the main urban centres of County Monaghan and the main urban and retail centres they compete

		Monaghan	Carrickmacross	Castleblayney	Clones	Ballybay
Dundalk	Distance	53k	33k	28k	73k	40k
	Time	46m	33m	23m	1h 3m	43m
Cavan	Distance	48k	88k	72k	28k	39k
	Time	43m	1h 19m	1h 6m	26m	1h 5m
Blanchardstown	Distance	135k	95k	111k	132k	123k
	Time	1h 38m	1h 11m	1h 16m	1h 43m	1h 36m
Dublin City Centre	Distance	132k	91k	107k	140k	120k
	Time	1h 38m	1h 10m	1h 15m	1h 50m	1h 35m
Newry	Distance	58k	51k	46k	79k	58k
	Time	54m	48m	38m	1h 12m	58m
Armagh	Distance	28k	56k	29k	48k	38k
	Time	26m	55m	42m	44m	45m
Craigavon	Distance	50k	79k	51k	70k	60k
	Time	52m	1h 20m	1h 7m	1h 10m	1h 11m
Enniskillen	Distance	58k	98k	83k	38k	73k
	Time	1h	1h 36m	1h 24m	43m	1h 24m
Belfast City Centre	Distance	94k	113k	108k	115k	105k
	Time	1h 20m	1h 38m	1h 28m	1h 38m	1h 39m

Source: www.theaa.ie

Competing Centres

2.3.1 Dundalk

Dundalk, with a population of 37,816 persons (Census 2011), is designated a ‘Gateway’ under the National Spatial Strategy, is a key urban centre in the north east and is placed in the second tier of national retail centres having a regional retail function under the Retail Planning Guidelines, 2012.

The Marshes shopping centre, which includes retailers such as Penneys, Dunnes Stores, River Island, New Look and Mothercare has increased the core shopping area to the south of the traditional Longwalk/Clanbrassil Street axis. Retail offer along the remaining town centre street is dominated by smaller, independent retailers. The Longwalk shopping centre anchors the centre of the town area, whilst a new Tesco shopping development has opened at Hill Street. The Carrolls Shopping Centre located in the centre of town remains closed.

Retail warehousing is centred in two out of centre locations – Dundalk Retail Park and Northlink Business Park, housing the likes of Atlantic Homecare, Harvey Norman, Argos, PC World, Currys, Heatons and Sportsworld.

2.3.2 Cavan Town

Cavan, designated a 'hub' town under the National Spatial Strategy, is the county Town and in 2011 had an urban population of 10,205 persons. In the Retail Planning Guidelines, 2012, Cavan is placed in the second tier of the retail centres having a regional retail function.

The main street shopping area includes Carphone Warehouse, Dunnes Stores, Tesco, Boots Pharmacy, Easons, Clarks Shoes and a large number of independent comparison retailers. Newcourt Shopping Centre within the town centre hosts a number of national retailers, including Absolute Jewellery, Crannog Bookshop and the Gift Box, along with other independent retailers.

The town includes two large scale retail developments, Cavan Retail Park and Lakeland Retail Park, on the outskirts of the town, including a range of major multiples such as Argos, Furniture Village, Woodie's DIY, Homemakers and SuperValu. In addition, Breffni Retail Park is home to a Paco factory outlet and McIntyres Furniture.

2.3.3 Blanchardstown Centre

Blanchardstown is one of the primary retail locations in the wider Dublin Region, and due to its location a short distance from the M50, is easily accessible to people travelling from County Monaghan. The Centre offers free parking within an extensive shopping centre and retail park complex.

The shopping centre offers a number of the large multiples, including Penneys, Debenhams Marks and Spencer, French Connection, Oasis, River Island, Zara, BT2, Burton, Dunnes, Easons and Lifestyle Sports. In addition, within the retail park are a variety of convenience, comparison, and bulky goods category retailers, including Atlantic Homecare, Harvey Norman, Mothercare, Next, Tesco and Mr. Price. This substantial retail offering is further reinforced by a wide range of other amenities including a multi-screen cinema, bowling facilities, restaurants and eateries, a hotel and library.

2.3.4 Dublin City Centre

Dublin City Centre is positioned at the top of the national retail hierarchy, as per the Retail Planning Guidelines, 2012. The retail offering which is located throughout a number of shopping centres, including the Jervis Centre, the Ilac Centre and St. Stephen's Green Centre, as well as shopping districts (Grafton Street, Henry Street) features a number of large department stores as well as flagship stores of national and international comparison retailers. Unlike some of the out-of-centre shopping centres, parking is not free and can be very expensive. However, this does not prevent people visiting, as the city centre is regularly serviced by both public and private bus operators.

2.3.5 Newry City

Newry is one of Northern Ireland's larger shopping locations with a mix of traditional high street shopping, two enclosed shopping centres, Buttercrane and the Quays, and some large retail warehouse units within the city centre. The Buttercrane has two retail anchors, Marks and Spencer and Dunnes Stores, the Quays is anchored by Debenhams Department store and a large Sainsburys superstore. Both shopping centres have extensive car parking. Comparison retailing in the shopping centres includes M&S, Debenhams, Dunnes, Primark, Topshop, Topman, Burton, Dorothy Perkins, New Look, Next, River Island, H&M, Monsoon, Jack & Jones, Oasis, TK Maxx and Peacocks.

Bulky goods provision is accommodated at the Damolly Retail Park on the outer ring road and is anchored by B&Q, along with Next Home, Smyths Toys, Mothercare, Currys and Halfords.

2.3.6 Armagh City

Armagh City is a key cultural location in the region. The Mall Shopping Centre is located in the town centre and is anchored by Sainsburys, other tenants include United Colors of Benetton, Sara, Card Heaven, Karine & Co. and Semi-Chem. Also within the town centre are a number of relatively large independent furniture, furnishings and hardware stores, including Ta Hawthorne and Decorbrite. There are also a number of multiples including Boots, Superdry, Dorothy Perkins, Topshop, and small independent retailers of clothing, footwear, jewellery, sportswear, florists, computer equipment and variety stores.

Spires Retail Park is located out-of-centre and includes Argos, Halfords, Kidzone, Toymaster, Marks & Spences Simply Food, Peacocks and Poundstretcher.

2.3.7 Craigavon

Rushmere dominates the shopping offer in Craigavon. The shopping centre serves both convenience and comparison needs. The convenience element is anchored by Sainsburys. The comparison offer is dominated by national multiples and has a notably strong fashion offer. Tenants include Debenhams, Internacionale, H&M, Dunnes, TK Maxx, Topshop, River Island, Dorothy Perkins, Burton and Monsoon.

Adjacent to the shopping centre is the Rushmere Retail Park, the clothing offer includes Matalan, Menarys and Next, along with other comparison retailers including Argos Extra, sports/outdoor pursuits and health and beauty shops, while bulky goods operators include Homebase, Currys, Pets At Home and Harry Corry.

Marlborough Retail Park is located a short distance away and is anchored by a large Tesco Extra superstore along with B&Q and Halfords.

2.3.8 Enniskillen

Enniskillen is the county town and retail centre of Fermanagh. The town is served by the convenience multiples of Tesco, Asda, Dunnes Stores, Lidl and Iceland.

Erneside Shopping centre is located on the edge of the town centre and offers a number of the comparison multiples, including Next, Marks and Spencer, Monsoon, H. Samuel, River Island, Argento, Argos, New Look and Trespass. Within the town centre are a number of multiples, including Topshop, Dorothy Perkins, Burton, Edinburgh Woollen Mill, Boots and B&M Bargains, along with a large number of independent retailers, including S.D. Kells and Houstons department stores and Sloan’s Shoes. The Buttermarket within the town centre provides niche and craft space across 16 small units.

A terrace of mixed bulky goods/trade counter uses, including furniture, carpets, household goods and motor factors, are housed on Derrychara Link in proximity to the Erneside shopping centre, while Currys and Cathcart's Home Improvement Store are located on the edge of the town.

2.3.9 Belfast City Centre

Belfast City Centre is the largest shopping location in Northern Ireland. The City Centre's shopping is area is spread across a large geographic area and comprises a mix of traditional high street shopping areas and modern shopping centres. The two main shopping centres are Castlecourt and Victoria Square. Castlecourt is anchored by Debenhams, while Victoria Square is anchored by House of Fraser. Along with shopping centres, the high streets around these shopping centres also provide a wide range of mainly comparison goods, ensuring that the city centre has representation of almost all of the international and national multiples as well as independent retailers.

There is a number of large retail parks located conveniently in proximity to motorway intersections which provide a large bulky goods offer.

3.0 Health Check Analysis

Retailing and the provision of retail services is one of the primary functions of any urban settlement. The concept of vitality and viability is central to maintaining and enhancing town centres. It will depend on many factors, including the range and quality of activities in a centre, its mix of uses, its accessibility to people living and working in the area, and its general amenity, appearance and safety. A healthy town centre which is vital and viable balances a number of qualities:

- Attractions
- Accessibility
- Amenity
- Action

Monaghan is the principal town of the County, and as such it is essential to maintain and enhance its retailing function. Carrickmacross and Castleblayney, in the south and mid-county, also serve as important market towns and provide a good range of convenience and comparison goods and it is important to retain the retailing function of these towns for the populations. Clones and Ballybay, in the west and mid-county, provide a more limited range of retailing services and act as local centres for surrounding populations.

3.1 Assessment of Key Towns

3.1.1 Monaghan Town

Monaghan is the largest town in the County with a town population of 7,452 and a wider Municipal District population of 20,500 (Census 2011). The town is located at an axis of primary routes, taking advantage of good national and regional road linkages. The town's designation as a 'hub' under the NSS 2002, must ensure a focus of 'supporting the national and international role of the gateways and in turn energising smaller towns and rural areas within their sphere of influence.'

Attraction

The county town's location is a key strength, located half way between Dublin and the Northwest, with infrastructural linkages on the national and regional road network, making the town very accessible on a national basis and to its large rural hinterland. A high volume of passing traffic brings vital retail expenditure inflow. The town has a good variety of convenience, comparison and bulky goods retail categories.

The main convenience multiples Tesco, Dunnes Stores, Supervalu and Lidl have a presence in the town, all operating from the town centre, while a number of other convenience retailers operate in and around the town.

Comparison retailers are mainly located within the town centre and shopping centre, which include a variety of independent retailers and a number of the multiples including Heatons, Easons, Boots, Carphone Warehouse, Vero Moda, Jack & Jones, Lifestyle Sports, Holland & Barrett, Dealz, Name It, Specsavers and Carphone Warehouse. There is a strong presence of independent clothing boutique shops and jewellers. The Monaghan Retail Park at the Clones Road on the edge of town features Next and Argos. A Farmers' Market is held to the front of the Courthouse every Friday.

The town also functions as the administrative centre of the county with the County Council offices and Garda Divisional Headquarters located within the town, along with the County Hospital and Monaghan Education Campus. A number of regional and county offices of banking and financial companies are located within the town centre. Key industries in Monaghan include Leckpatrick Dairies, Combilift, Monaghan Mushrooms and Kingspan Century providing significant employment.

Accessibility

Monaghan is strategically located at the intersection of the N2 Dublin-Derry, N12 Armagh and N54, linking Dublin to the North-West and Belfast to the Midlands respectively. The town is also located along the east-west corridor linking Dundalk and Newry to Sligo. Monaghan is linked by the substantially improved national and regional road network to the hub town of Cavan and urban centres of Enniskillen, Omagh, Dungannon and Armagh. Improvements in the national road infrastructure with the completion of works on the M1 motorway, Carrickmacross, Castleblayney and Monaghan bypasses have strengthened the town's strategic position and its future development potential as an enterprise and regional centre.

The provision of car-parking in Monaghan is generally good. There are currently 1,027 car parking spaces provided by the County Council, either as on-street spaces or dedicated public car parks. In addition, there are private spaces provided, the most sizeable of these at the shopping centre, Lidl and the Credit Union. Public pay parking was introduced in January 2005. Free parking is available at more peripheral locations within the town.

Pedestrian accessibility through the town in the main areas is generally good and recent upgrades of the footpaths network and the provision of pedestrian crossings has improved pedestrian accessibility. However, further enhancements particularly in the Dublin Street and Glaslough Street areas, would allow for greater pedestrian flows in areas that have particularly suffered through the recession.

Located on the primary road network, Monaghan is served by public bus operators on the Dublin to Letterkenny/Derry route along with private companies operating the Letterkenny-Monaghan-Dublin route. The installation of a taxi rank at the front of the Courthouse in December 2008 ensures improved access to a taxi service.

Traffic movement around the town is generally free moving, with the exception of the Clones Road, particularly around school times, which is subject to congestion and delays, preventing free-flow of traffic into the town.

Amenity

Monaghan is an attractive town with natural amenities such as Peter's Lake and Rossmore Park. Its streetscape has a wealth of buildings and archaeological interest around a series of four urban spaces of quite different character, Market Square, Church Square, Old Cross Square and the Diamond. The Diamond plays host to a number of festivals throughout the year, including the annual Monaghan Town Country Music Festival.

There are a range of cultural and civic facilities including the County Museum, Garage Theatre, Market House, the Library and Monaghan Leisure Complex. The town hosts three hotels, The Four Seasons, The Hillgrove and The Westenra Arms. Outdoor recreation pursuits, such as angling, walking and golf, are related primarily to the natural amenities around the town.

The impact of the recession has left many vacant properties, particularly along Dublin Street, which detracts from the vitality of the town. A vacancy and dereliction survey in November 2013 revealed 83 vacant commercial premises, totalling approximately 9,738 sq. m. of floorspace. The absence of a strong Chamber of Commerce in the town over the years has limited the cooperation of the retailers to promote the town effectively. However, it is hoped this will be addressed with the recent appointment of a town centre business coordinator.

Action

This health check has identified a number of key areas which require action:

- Measures to consolidate the town centre, ensuring that retail development should be confined to the existing town centre area
- Alleviation measures to the traffic congestion on the Clones Road approach to the town centre
- Address vacancy levels within the town, particularly in Dublin Street and Glaslough Street, and reintegrating this part of the town into the commercial core
- Coordination of town centre retailers activities to promote the town as a package
- Environmental enhancement plans to allow for increased footfall throughout the town centre
- Measures should be implemented to prevent vacant units within the town centre falling into disrepair

3.1.2 Carrickmacross

Carrickmacross is the main town in the south of the County located on the Dublin to Letterkenny/Derry N2 National Route. The town serves the economic needs of a large rural hinterland, which extends into counties Cavan, Meath, Louth and Armagh.

Attraction

The town has a firm commercial and industrial base and its strategic location along the N2 Dublin to Letterkenny/Derry National Primary route, in proximity to Dundalk, the gateway for the North-East region, and easy access to the M1 motorway and Dublin has attracted significant inward investment resulting in a buoyant local economy, strong growth and demand for residential and retail development, and expansion of the town. Major employers in the town include Kerry Foods, Farney Foods and C&M Coldstores. The recent closure of the Bose factory in May 2015 is having significant impact on the activities of the town.

The core retail area is the Main Street, with secondary areas along Chapel Lane, Parnell Street, O'Neill Street and Farney Street. The town centre is attractive and has been enhanced in recent years by the shopping centre development anchored by O'Gorman's Supervalu. Other enhancements in the Convent Lands area at the edge of the town include new civic offices, C:TEK building (Carrickmacross Technology Education and Knowledge) and two new supermarkets, Aldi and Lidl. The unfinished retail and residential development on the Ardee Road detracts from the physical and visual links between the existing town centre and these new developments.

There is a variety of convenience, comparison and bulky goods retail categories. The town retains its traditional street market on a weekly basis.

The town is represented by the convenience multiples of Supervalu, Aldi and Lidl, all operating from the town centre and edge of town centre, while a number of other convenience retailers operate in and around the town.

There is a wide variety of comparison retailers located within the town centre, which include a wide variety of independent retailers, including electrical items, hardware, furniture, gifts, clothing, shoes, gifts, stationary supplies, pharmacies and gifts. The multiples are generally absent from the town. A well established market is held on the Main Street on a weekly basis.

Accessibility

Carrickmacross is strategically located along the N2 (bypassed) close to the M1 motorway link at Ardee, approximately 80 km north of Dublin, 35 km south of Monaghan town and 20 km west of Dundalk. The regional road network provides good linkages with Dundalk and other towns in the area. The improved road network has brought the town into commuting distance of Dublin, and appears to have impacted on, and increased the population of the town.

The main provision of car parking is on-street along the Main Street, Farney Street and O'Neill Street. While parking bays are marked, parking is often haphazard and can cause obstructions and slow traffic passing through the town. In addition to the on-street parking, car parks are located to the rear of the shopping centre, the Fiddler's Elbow, Shirley Arms Hotel and O'Duffy's Centre. Two car parks were extended in the town in 2014. There are approximately 870 parking spaces in the town. Public parking spaces are free, the continuation of which is supported by the Chamber of Commerce.

Pedestrian accessibility through the town is adequate, although there are no specific pedestrianised areas. The provision of pedestrian crossings has improved pedestrian accessibility and the adequacy of movement is deemed satisfactory.

Located along the primary road network, Carrickmacross is served by public bus operators on the Dublin to Letterkenny/Derry route along with private companies operating the Letterkenny-Monaghan-Dublin route.

Amenity

Carrickmacross is a prosperous town with a busy town centre. The town centre has a wide main street enclosed by the Courthouse to the north and St. Finbarr's Church at the top of Castle Street, to the south. There are a number of historical buildings in the town, which complement the range of bustling shops on Main Street. The town is noted for its Carrickmacross Lace and offers a range of day and evening activities: golf, leisure centre, lakes and fishing and has two hotels, the Nuremore and the Shirley Arms. The pride and volunteerism of the Carrickmacross people is demonstrated in its achievements in the Tidy Towns competition and in the annual Carrickmacross Festival providing great family fun for the June bank holiday weekend. These activities are strongly supported by a vibrant Chamber of Commerce and Industry.

Action

This health check has identified a number of key areas which require action:

- Measures to improve parking arrangements, particularly along Main Street
- Measures to consolidate the town centre, ensuring that retail development should be confined to the existing town centre area
- Continued cooperation with town centre retailers activities to promote the town as a package
- Environmental enhancement plans to allow for increased footfall throughout the town centre

3.1.3 Castleblayney

Castleblayney is the third largest town in the County, located along the N2 Dublin to Letterkenny/Derry national route, and serves as a market centre for its rural hinterland. New residential and commercial developments have strengthened the town's economic base in recent years.

Attraction

The traditional shopping area is focused on Main Street, with retailing provided to a lesser extent on Muckno Street, York Street and Dublin Road, which provide a reasonable variety of convenience and comparison opportunities within the town, along with a Lidl store on Monaghan Road. A number of bulky comparison goods outlets are located in the Monaghan Road area. There has been significant investment in Castleblayney through the development of two shopping centres on Main Street/West Street, although the larger of these, after a brief period of partial occupation, has closed which has a major impact on Main Street.

Major employers in town include Kingspan, Shabra, M.C. Chemicals and Castlecool.

Accessibility

Castleblayney is bypassed along the Dublin to Letterkenny/Derry N2 national route and is linked to Dundalk, Gateway for the region, by the N53 National Secondary route. The bypass has served to reduce the overall congestion in the town and consideration should now be given to providing a more pedestrian friendly street. Although there are various alleyways linking on to the Main Street, they could be enhanced and made more attractive. All parking in the town is free, much of which is provided on-street, particularly along the busier Main Street, while significant off-street parking is available at York Street, Thomas Street and McGrath Road. There are approximately 600 car parking spaces in the town.

Located beside the N2, the town is served by public bus operators on the Dublin to Letterkenny /Derry route along with private companies operating Monaghan-Dublin route.

Amenity

Castleblayney is situated on the shores of the impressive Lough Muckno Leisure Park, a resource used for angling, water sports, walking, picnics, golfing and festivals. Other facilities include Concra Wood 18-hole golf club, theatre and bowling alley. Key annual festivals in the town include Muckno Mania Festival and Castleblayney Drama Festival, which are well supported throughout the region. The town has one hotel, the Glencarn, that offers conferencing and leisure facilities,. The Iontas Resource centre also offers conference and training facilities, along with a gallery and theatre.

Unoccupied and derelict buildings including the Market House, Hope Castle, Muckno Street properties and the vacant shopping centre detract from the attractiveness of the town.

Action

This health check has identified a number of key areas which require action:

- Measures to address vacancy and dereliction on Main Street (including McConnon's shopping centre), Muckno Street, Market Square and Lough Muckno Park – particularly the Market House, Gate Houses and Hope Castle
- Measures to improve parking arrangements, particularly along Main Street
- A coordinated approach to the development of Lough Muckno

3.1.4 Clones

Clones is the fourth largest town in the county and is located approximately 1.5 km from the border with Northern Ireland. The town serves the local needs of its hinterland population.

Attraction

The town's key retail outlet is the Supervalu convenience store located on Fermanagh Street. Most of the other retail outlets are located on Fermanagh Street. The town has lost much of its retail function and the variety of retail outlets in Clones is limited. There is a lack of both convenience and comparison shops. In recent years, closures of typical shops such as hardware, clothing, florists has left the town uncatered for in these areas. Two filling stations on the Monaghan Road with convenience stores provide a relative high standard of convenience goods to the local catchment and passers-by.

Major employers in the town include ABP and Feldhues.

Accessibility

The town is located 20 km from Monaghan Town and 25 km from Cavan along the N54 National Secondary Road, which links Belfast to Galway.

Car parking in the town is provided through a variety of on- and off-street parking. The two main car parks to the rear of Fermanagh Street and The Diamond provide in excess of 150 parking spaces and tend to be under-utilised. There is additional car parking located at Roslea Road and ’98 Avenue.

Public transport to the town is limited to Bus Eireann and Ulsterbus Goldline routes. Private bus operators supplement the Bus Eireann routes.

Amenity

The town’s attractions include its rich archaeology and built heritage, including a Round Tower and Abbey, High Cross, Ring Forts and churches. The delivery of two major projects in the town, the PEACE LINK multi-user sports facility and the potential re-opening of the Ulster Canal, represents a stimulus for investment in the area.

The town plays host to the Gaelic Football Ulster Championship Final in July and a number of other high profile matches, which draw large crowds to the town, as do key annual festivals including the Flat Lake Literary and Arts Festival, Clones Film Festival and Clones Canal Festival.

The town is served by one hotel, The Creighton, which underwent extensive refurbishment in 2014.

The closure of a number of shops, businesses and hotels has served to further reduce the attractiveness of Clones and has aggravated the retail leakage from the town.

Action

This health check has identified a number of key areas which require action:

- Coordinated marketing strategy to build on the key attractions, facilities and festivals
- Measures to tackle vacancy and dereliction, particularly in Fermanagh Street
- Measures to ensure increased parking availability at Fermanagh Street

3.1.5 Ballybay

Ballybay is the smallest of the five towns and is located centrally in the county and serves as a market town for a large rural hinterland.

Attraction

The main shopping area is concentrated solely on Main Street. The variety of retail outlets in the town extends to two supermarkets, other shops include clothing, pharmacies, florists and hardware stores. The livestock mart on Saturdays helps to sustain the small shops. Major employers in the town include KEPAK and Leonard Engineering.

Accessibility

Ballybay is located less than 20 km from all the towns in the county and is linked by the county's regional road network. Public transport to the town is limited but local links provided by Bus Eireann and Baltibus Rural Transport Programme link the towns in the county.

Car parking is available mostly on-street along Main Street, while there is also a public car park available off the Clones Road.

Pedestrian accessibility through the town is adequate. The provision of pedestrian crossings has improved pedestrian accessibility.

Amenity

The town is set on the edge of Lough Major which forms part of the Dromore River system and provides an important recreational and tourism resource in the area. The Wetlands Centre provides for the study and appreciation of a unique wildlife experience with its regionally important site for wintering migratory birdlife and offers eco-tourism and schools packages. The Dromore lakes/river system provides a great location for fishing. Other local activities include peaceful walkways, bowling green and a range of sporting activities.

A number of derelict and vacant properties detract from the amenity of the town.

Action

This health check has identified a number of key areas which require action:

- Measures to address vacancy and dereliction
- Marketing and promotion of the town's key attractions
- Coordinated approach to enhancing the public realm of Main Street

3.1.6 Villages

Ten Tier 4 and fourteen Tier 5 settlements have been designated in the County Development Plan 2013-2019. The Retail Planning Guidelines, 2012 states the following in relation to small towns/villages:

> *The role of small towns and villages in the provision of retail services to their local urban and rural populations should be defined in development plans. Where appropriate, the maximum size of store, consistent with maintaining a variety of shops in the centre of these towns and villages and protecting an appropriate level of retail provision in the rural area, should be identified. In general there should be a clear presumption stated in favour of central or edge-of-centre locations for new developments.*

The villages range greatly in size and in the variety of services available, at a minimum, a grocery store, serving day-to-day needs, and pub to having a limited range of comparison shops and professional services. Some villages have lost functions in recent years, with closures of local shops and pubs and are suffering from dereliction, while those villages with wider functions in employment and tourism/heritage, such as Emyvale, Glaslough and Inniskeen have retained their vibrancy.

Actions

Although there is unlikely to be any significant demand for further retailing services in the villages, development of convenience shops of suitable scale may be accommodated within existing villages, along with small comparison and professional services and specialist functions, which will sustain and improve the quality of life of the people in these communities. New large-scale shopping facilities would not be permitted in villages as they would not be sustainable or desirable.

3.2 Retail Floorspace Activity

The following table summarises the retailing activity in the county since the last retail strategy prepared in 2003. The period represented unprecedented growth and demand for retailing developments up until 2007 followed by relative stagnation of development up until present.

Table 3.1 Baseline Assessment of Retail Floorspace, 2015

	2003 Baseline (m2)	2015 Baseline (m2)	Total Vacancy (m2)	Floorspace in use (m2)	Available Floorspace in use (%)
Monaghan					
Comparison	6,623	8,359	1,070	7,289	87%
Bulky Comparison	6,113	15,663	5,250	10,413	66%
Convenience	5,882	8,500	40	8,460	99.5%
Total	**18,618**	**32,522**	**6,360**	**26,162**	**80%**
Carrickmacross					
Comparison	2,638	2,484	600	1,884	76%
Bulky Comparison	1,931	1,931	400	1,531	79%
Convenience	3,148	5,775	80	5,695	99%
Total	**7,717**	**10,190**	**1,080**	**9,110**	**89%**
Castleblayney					
Comparison	1,688	6,631	3,657	2,974	45%
Bulky Comparison	3,829	10,185	4,544	5,641	55%
Convenience	2,373	6,398	1,087	5,311	83%
Total	**7,890**	**23,214**	**9,288**	**13,926**	**60%**
Clones					
Comparison	706	567	300	267	47%
Bulky Comparison	402	402	300	102	25%
Convenience	1,068	1,124	105	1,019	91%
Total	**2,176**	**2,093**	**705**	**1,388**	**66%**
Ballybay					
Comparison	585	746	285	461	62%
Bulky Comparison	-	-	-	-	-
Convenience	578	633	-	633	100%
Total	**1,163**	**1,379**	**285**	**1,094**	**79%**
Villages/ rural*					
Comparison	160	939			
Bulky Comparison	950	1,409			
Convenience	1,270	633			
Total	**2,380**	**3,470**			
Total					
Comparison	12,400	19,726	5,912	12,875	
Bulky Comparison	13,225	29,590	10,494	17,741	
Convenience	14,324	23,063	1,312	21,118	
Total	**39,944**	**72,379**	**17,718**	**51,734**	

*Assumption of 5% of total floorspace

Convenience - Monaghan, Carrickmacross and Castleblayney saw substantial increases in convenience floorspace, Monaghan seeing a 45% increase, Carrickmacross an 83% increase and Castleblayney a 170% increase during the period 2003 - 2015. Whilst Monaghan and Carrickmacross are sustaining their increases in convenience floorspace with 0.5% and 1% vacancy levels respectively, Castleblayney has a 17% vacancy level for convenience floorspace.

Comparison – There were varied changes between the towns to comparison floorspace between 2003 and 2015, with Monaghan experiencing a 26% increase and Ballybay a 28% increase, while Carrickmacross and Clones experienced decreases of 6% and 20% respectively. Of particular note is the 393% increase in floorspace in Castleblayney, which has resulted in its 55% vacancy level. Vacancy levels are also high in Clones (53%), Ballybay (38%) and Carrickmacross (24%). Monaghan has the lowest comparison vacancy rate at 13%.

Bulky comparison – Only Monaghan and Castleblayney experienced growth in this sector between 2003 and 2015, with floorspace increases of 256% and 266% respectively. The vacancy levels are high for both towns - 45% in Castleblayney and 34% in Monaghan. Carrickmacross has a vacancy level of 21%, whilst Clones has a figure of 75%, although this is assessed against a low level of floorspace.

Given the levels of vacancy in the towns, it is imperative that those retail units that are vacant at present are not allowed to fall into further disrepair and dereliction. It is also important to identify opportunity sites within the main towns which would improve and enhance the retail provision and the general amenity and vitality of the towns. Development outside the main retail areas should not have a negative impact on the retailing hierarchy of the county and should be in keeping with the existing scale and character of individual settlements.

4.0 Projected Floorspace Requirements

4.1 Introduction

This section provides the County's projected retail floorspace requirements for the convenience, comparison and bulky goods categories. The following methodology has been used to project the retail floorspace requirements for County Monaghan:

- Population estimate at base and design year;
- Estimation of available expenditure per capita of the retail categories (convenience, comparison and bulky) at base and design year;
- Projection of total available expenditure at base year and design year;
- Estimate of the likely turnover of new floorspace in the retail categories; and
- Estimate the capacity for additional floorspace within the retail categories, taking account of existing vacancy rates and planning permissions.

4.2 Population

The population of County Monaghan has demonstrated substantial growth since 1996, with the most substantial growth occurring since 2002. From 2002 to 2011 the population increased from 52,583 to 60,483, a 15% increase in nine years.

Table 4.1 County Monaghan population and projected population

2006	2011	2016	2022
55,997	60,483	66,324	71,400

RPGs population figures, p. 46

The starting point for the assessment of future floorspace requirements is projected population growth over the plan period. In accordance with the RPG forecasts, the population of the County is projected to increase by 10,917 people between 2011 and 2022, which reflects an 18% increase over that period.

In the Regional Planning Guidelines, a target population for Monaghan Town has been set at 9,300 for 2022, a projected increase of 1,848, (up 25% in 11 years).

The core strategy, as set out in the Monaghan County Development Plans, 2013-2019, includes a settlement hierarchy, associated maps and a core strategy table summarising the key statistics as regards future population, specifically setting population targets and housing requirements. The core strategy provides some indication of predicted growth for other towns from 2011 to 2019.

Table 4.2 County Monaghan and Towns Target Population Growth, 2019

Area	Target Population Growth from 2011-2019
County	8,367
Monaghan Town	1,450
Carrickmacross	580
Castleblayney	556
Clones	490
Ballybay	245

Extract from Core Strategy Table 3.13, Development Plan 2013-2019

4.3 Expenditure Estimates

Based on the 2011 Annual Services Inquiry it is estimated that the total expenditure per capita in 2011 on convenience goods was €3,508 and €3,807 on comparison goods when adjustments are made in respect of internet/mail order retailing, department stores and forecourt sales.

Table 4.3 Adjustments to Available Expenditure

	Convenience	Comparison
Expenditure per capita at 2011 prices	€3,508	€3,807

Source: CSO Consumer Price Index

An adjustment needs to be made for County Monaghan to allow for lower expenditure per capita on comparison goods. A CSO publication on regional per capita income (County Incomes and Regional GDP, February 2011) outlines that per capita income in the Border Region was 90.6% of the national average in 2010. For the purposes of this study it is assumed that expenditure on comparison goods in Monaghan is approximately 91% of the national average. This equates to a figure of €3,465 in 2011.

Table 4.4 Adjustments to Available Expenditure based on adjustment to comparison expenditure in the Border Region

	Convenience	Comparison
Expenditure per capita at 2011 prices	€3,508	€3,465

Source: CSO Consumer Price Index

The figures above need to be adjusted to reflect expenditure levels in 2015 taking account of the Consumer Price Index. Expenditure growth in convenience and comparison between 2011 and 2015 has been assumed as zero.

A strong recovery in economic activity is predicted to continue into 2015 with forecasted growth in both GNP and GDP by approximately 4% (ESRI Quarterly Economic Commentary, Spring 2015, 25th March 2015). The latest figures on retail performance for the first quarter of 2015 show retail sales values only up 0.8% (Retail Ireland Monitor, Quarter 1, May 2015). These numbers suggest a disparity between the economic performance and consumer perception and action. From 2015 to 2022, therefore it is assumed that convenience growth in expenditure will be 0.5% per annum and 1.5% in comparison spend per annum. This is to be reviewed as economic conditions change. The projected per capita expenditure using these growth rates are given in Table 4.5 below.

Table 4.5 Projected Expenditure per capita

	Convenience	Comparison
2011	€3,508	€3,465
2016	€3,544	€3,570
2022	€3,652	€3,904

4.4 Total Available Expenditure

This is calculated by multiplying the population by the expenditure per capita for each category.

The population estimates for the county are as follows using the Regional Planning Guidelines targets.

Table 4.6 County Monaghan population estimates

	2011	2016	2022
County population	60,483	66,324	71,400

Source: CSO and Regional Planning Guidelines

Table 4.7 Total Available Expenditure

	Convenience	Comparison	Bulky goods	Comparison excluding bulky goods
2011	€212.17m	€209.57m	€41.91m	€167.66m
2016	€235.05m	€236.78m	€47.36m	€189.42m
2022	€260.75m	€278.75m	€55.75m	€223m

The table (4.7) above sets out the total projected expenditure by category within county Monaghan. In considering the above expenditure levels it is important to note that significantly different levels of turnover will apply to comparison goods, such as clothing and footwear and smaller household durables, than would apply to bulky household goods sold in retail warehouses. Retail warehouses have a distinct function and are generally located outside of town centres. As such it is necessary to split the available comparison expenditure between bulky and non bulky comparison goods.

Having regard to the Household Budget Survey and experience elsewhere in this respect, it is estimated that approximately 20% of comparison expenditure will be accounted for by bulky household goods in retail warehouse type premises. This has been reflected in the table above.

4.5 Adjustments for inflows and outflows

Some adjustments to the capacity figures, outlined in table above, are required to take into account the levels of trade draw and leakage of expenditure from the catchment area. Assumptions on both market share and trade draw are informed by the household and shopper surveys undertaken by Demographics Ireland in June 2011, the results of which are summarised in Appendices 1 and 2 of the Retail Strategy.

The household survey undertaken by Demographics Ireland identified the following trends in the county:

- Convenience: 92% of respondents survey undertook their main food and grocery shopping within County Monaghan
- Comparison: 51% of the total respondents surveyed undertook their main clothing and footwear shopping within County Monaghan
- Bulky Goods: 78% of respondents undertook their main bulky goods shopping within County Monaghan

A validation of the Demographics Ireland survey was carried out in March 2015 and the following was deduced in regard to shopper surveys:

- Convenience: 94% of respondents undertook their main food and grocery shopping within County Monaghan (out of 99 valid responses)
- Comparison: 38% of respondents surveyed undertook their main clothing and footwear shopping within County Monaghan (out of 81 valid responses)
- Bulky Goods: 63% of respondents undertook their main bulky household furniture goods (i.e. DIY goods, furniture, carpets) within County Monaghan (out of 68 valid responses)
- Bulky Goods: 61% of respondents surveyed undertook their main bulky household electrical goods (i.e. freezers, washing machines, etc.) within County Monaghan (out of 70 valid responses)

The results relating to convenience shopping are consistent with the 2011 survey. However the comparison survey displays a substantial discrepancy between the results collected in 2011 to 2015. This may be attributed, in part, to increases in the use of online shopping and substantial vacancy levels. There is also a discrepancy in the bulky goods sector which may also be attributable to increases in online shopping and vacancy levels. In light of the small validation sample and the above conclusions it would be assumed reasonable to base figures on the 2011 survey.

Inflows

In terms of trade draw, the shopper surveys undertaken by Demographics Ireland identified an inflow of expenditure of 9% from residents outside of the county. For the purposes of this assessment, it is assumed that 4% of these respondents were in Monaghan for their main grocery, 4% for comparison and 1% for bulky goods shopping.

Having regard to the trends identified within the household and shopper surveys, the following adjustments are made to the total expenditure within the catchment.

Table 4.8 Total Available Expenditure adjusted to account for Inflows and Outflows

	Convenience 2011		Comparison 2011		Bulky Goods 2011	
Resident Expenditure		€212.17m		€167.66m		€41.91m
Less Outflows	6%	€199.44m	49%	€85.51m	22%	€32.69m
Add Inflows	4%	€7.98m	4%	€3.42m	1%	€0.33m
Spend in the county		€207.42m		€88.93m		€33.02m
	Convenience 2016		Comparison 2016		Bulky Goods 2016	
Resident Expenditure		€235.05m		€189.42m		€47.36m
Less Outflows	6%	€220.95m	49%	€96.60m	22%	€36.94m
Add Inflows	4%	€8.84m	4%	€3.86	1%	€0.47m
Spend in the county		€229.79m		€100.46m		€37.41m

	Convenience 2022		Comparison 2022		Bulky Goods 2022	
Resident Expenditure		€260.75m		€223m		€55.75m
Less Outflows	6%	€245.11m	49%	€113.73m	22%	€43.49m
Add Inflows	4%	€9.80m	4%	€4.55m	1%	€0.44m
Spend in the county		€254.91m		€118.28m		€43.93m

Table 4.9 Existing floorspace in County Monaghan 2015 (m2)

	Convenience	Comparison	Bulky Goods	Total
Monaghan	8,500	8,359	15,663	32,522
Carrickmacross	5,775	2,484	1,931	10,190
Castleblayney	6,398	6,631	10,185	23,214
Clones	1,124	567	402	2,093
Ballybay	633	746	-	1,379
Villages/rural areas*	1,122	939	1,409	3,470
Total	**23,552**	**19,726**	**29,590**	**72,868**

**Assumption of 5% of total floorspace*

The estimated existing floorspace within the county has been derived from the baseline of the 2003 Retail Strategy and floorspace surveys carried out by the Council in 2009 and 2015. An assumption has been made that the villages and other rural areas contribute 5% of the total available retailing floorspace.

The number of live planning permissions for retail floorspace that have not been constructed is very limited and would not in any consequential way distort the figures presented in Table 4.9 above.

4.6 Turnover estimates

It is possible to derive the turnover of existing floorspace within the catchment area by multiplying the floorspace in each category by average turnover. A turnover of €8,500 per sq. m. is assumed for existing convenience floorspace within the catchment area in 2010 and €4,500 per sq. m. for comparison floorspace. An average turnover of €1,800 per sq. m. is assumed for bulky goods in 2010 prices. The figures are based on published retail industry data and have regard to the average turnover per sq. m. calculations established in the Retail Planning Guidelines Study 1999 (Tyn and Blackwell). They reflect the average turnover levels retailers will require to sustain a healthy level of activity. In consideration of the economic climate since 2010, it is reasonable to assume a 0.5% increase per annum for convenience turnover and a 1.5% increase per annum for comparison and bulky comparison turnover, of these 2010 figures.

Table 4.10 Turnover Ratios Assumed for Existing Floorspace

	Convenience	Comparison	Bulky Goods
2015	€8,715	€4,850	€1,939

These figures show the average turnover per sq. m. of existing floorspace overall in Co. Monaghan, however they disguise significant differences in turnover for different shops. In general, multiple branches of national and international multiple shops are located within purpose built shopping centres or other prime locations. Prime town centre shop units will have substantially higher turnover per sq. m. than shops which are less well located or situated in older inefficient premises and are operated as independents. In particular, it is likely that smaller units have substantially lower turnover per sq. m. than these averages, whilst the largest supermarket operators have substantially higher turnover rates per sq. m.

The turnover of existing retail floorspace within the County in 2015, 2016 and 2022 is obtained by multiplying the existing floorspace estimates set out in Table 4.9 by the turnover per sq. m. estimates set out in Table 4.10.

Table 4.11 Turnover of Existing Floorspace in County Monaghan, 2015

	Existing floorspace sq. m.	Turnover per sq. m.	Turnover of existing floorspace
Convenience	23,552	€8,715	€205,255,680
Comparison	19,726	€4,850	€95,671,100
Bulky Goods	29,590	€1,939	€57,375,010

The residual surplus for additional retail floorspace within the County is obtained by subtracting the turnover of existing convenience, comparison and bulky goods expenditure as set out in Table 4.11 above by the total available expenditure set out in Table 4.12.

Table 4.12 Available Expenditure for Additional Retail Floorspace in County Monaghan

Year	Available Expenditure	Turnover of existing floorspace	Residual surplus/shortfall
Convenience			
2015	€207,420,000	€205,255,680	€2,164,320
2016	€229,790,000	€205,255,680	€24,534,320
2022	€254,910,000	€205,255,680	€49,654,320
Comparison			
2015	€88,930,000	€95,671,100	- €6,741,100
2016	€100,460,000	€95,671,100	€4,788,900
2022	€118,280,000	€95,671,100	€22,608,900
Bulky Goods			
2015	€33,020,000	€57,375,010	- €24,355,010
2016	€37,410,000	€57,375,010	- €19,965,010
2022	€43,930,000	€57,375,010	- €13,445,010

4.7 Floorspace Capacity

In order to calculate the requirements for additional retail floorspace within the catchment area, the turnover per sq. m. of future retail floorspace should be divided by the available expenditure figures set out in Table 4.12 above.

For the purposes of this assessment a turnover per sq. m. of €8,715 is assumed for new convenience floorspace, €4,850 for new comparison and €1,939 for new bulky goods floorspace in 2015.

Table 4.13 Turnover of Future Retail Floorspace

	2015	2016	2022
Convenience	€8,715	€8,759	€9,025
Comparison	€4,850	€4,923	€5,383
Bulky Goods	€1,939	€1,968	€2,152

Assumption: 0.5 % increase in turnover efficiency per annum for convenience and 1.5% increase in turnover efficiency per annum for comparison and bulky goods.

The future floorspace requirements for additional convenience, comparison and bulky goods floorspace within County Monaghan are detailed in the table (4.14) below.

Table 4.14 Indicative Additional Floorspace Requirements for County Monaghan

	Convenience sq. m.	Comparison sq. m.	Bulky Goods sq. m.
2015	248	-1,390	- 12,561
2016	2,801	973	- 10,144
2022	5,502	4,371	- 6,248

The floorspace capacity figures presented above are indicative of the scale of new floorspace required to meet the needs of existing and future population and expenditure across the county. A key consideration is the scale and location of new floorspace. Additional new floorspace may be proposed and this could replace some existing outdated or poorly located retail floorspace. The quantum of retail floorspace only becomes a critical consideration where new convenience and comparison floorspace is proposed outside of the town centres and the issue of the likely impact on the town centres arises.

4.8 Future Retail Floorspace Requirements

The Retail Planning Guidelines advise that Retail Strategies should, "*assess the broad requirement for additional development over the plan period.... these assessments of future retail requirements are intended to provide broad guidance as to the additional quantum of convenience and comparison floorspace provision. They should not be treated in an overly prescriptive manner, nor should they serve to inhibit competition.*" For this purpose it is not the intention of this strategy to present figures as some form of cap on retail permissions in the County, but rather to guide the general scale of overall retail provision.

Consideration should be given to the quality of the existing vacant retail floorspace, including the prospective suitability of available floorspace to meet the future needs of retailers in the County. However, it is recognised that this is not always possible given the changing dynamics of shopping. Retail Impact Statements will be required to accompany planning applications for future retail development in size order to best guide development in County Monaghan, and should be based on the rationale and findings of the information provided in this Retail Strategy.

In acknowledgement of the high levels of retail leakage from the county, particularly in the comparison sector, and that the proposed additional floorspace requirements are indicative only, it should be noted that it is an aspiration of the Planning Authority to reduce retail leakage, which is supported in its various objectives and policies. Proposals for new retail development may be required to conduct capacity assessments, having regard to the estimated leakage at the time of assessment of any planning application, as part of a Retail Impact Assessment to demonstrate capacity for the proposed new retail development.

5.0 Recommendations

5.1 Retail Strategy and Policy Guidance

The Council aim to ensure that all retail development permitted is in accordance with the Retail Planning Guidelines for Planning Authorities, 2012 and the Retail Design Manual – A Good Practice Guide, 2012 and the County Retail Strategy 2016-2022. The Retail Strategy sets out the retail hierarchy for the County and confirms the level and form of retailing activity appropriate to each of the main towns.

Analysis of recent trends and forecasts would suggest a gradual upturn in the retail sector and along with anticipated population increases, would envisage a more positive outlook for retailing in the County over the lifetime of this Strategy. Going forward, regard must be had to the legacy of vacant retail floorspace left after the economic recession and consideration must be given to incorporating this in future developments in the towns.

5.2 Retail Hierarchy

Monaghan County Council supports a balanced development model, promoting the treatment of urban and rural settlements, together with the surrounding countryside, as functional areas. The Retail Hierarchy has, therefore, been dictated by the County settlement hierarchy in the Development Plan. The Tier 4 and Tier 5 villages have been included, and the provision of suitable retail development, such as a local shop, within these villages would be considered appropriate, subject to normal planning considerations.

Figure 5.1 Retail Hierarchy

Tier 1

Hub Town and County Retail Centre

Monaghan

With a population of 7,452, Monaghan town is the key employment, retail and service centre with the highest proportion of convenience and comparison floorspace

Tier 2

Sub-county Retail Centres

Carrickmacross and Castleblayney

Towns providing an extensive range of local comaprative and convenience retail floorspace as well as being significant employment centres

Tier 3

Local Retail Centres

Clones and Ballybay

Towns with a limited local comparative and convenience retail and serve a localised catchment

Tier 4

Rural Villages / Shops

Ballinode, Emyvale, Glaslough, Inniskeen, Newbliss, Rockcorry, Scotshouse, Scotstown, Smithborough, Threemilehouse

Villages providing local convenience retail, usually consisting of a post office, one or two pubs and possibly very limited comparative retail

Tier 5 and Tier 6

Tier 5 - Small Rural Villages / Shops

Annyalla, Carrickroe, Clontibret Nos. 1 & 2, Corcaghan, Corduff, Doohamlet, Drum, Knockatallon, Knockconan, Latton, Lisdoonan, Oram and Tydavnet

Tier 6 - Dispersed Rural Communities

Small villages and dispersed rural communitites providing daily convenience goods and possibly a public house/community centre

5.3 Guidance on the Location and Scale of Retail Development

In accordance with the Retail Hierarchy it is expected that the majority of new future retail developments in the County will be in the Tier 1 and 2 towns of Monaghan, Carrickmacross and Castleblayney.

Due to its 'hub' designation, location and increasing population projections, it is anticipated that Monaghan town should attract substantially more future retail applications than other settlements in the county. Carrickmacross, given its proximity to major population centres, larger hinterland, established market and lower vacancy levels, may be better positioned to draw further new retail floorspace.

Appropriately located large-scale retail developments will be directed towards Tier 1 and Tier 2 town centres only where a need has been identified and strictly having regard to the Sequential Test.

Retail developments in the two tier 3 towns and villages are expected to be limited and any retail developments should be to enhance the existing retail environment to serve and benefit local communities. Expected types of retail developments would include general grocery shops, post offices, pharmacies, salons and cafes.

5.4 Retail Policies and Objectives

The primary objective of the Retail Strategy is to ensure the orderly development of future retail floorspace within County Monaghan over the lifetime of this strategy.

Objective 1 To ensure the orderly development of future retail developments in County Monaghan, to keep the Retail Strategy under review, having regard to changes in the retail sector, and have regard to any such review in determining applications for retail development.

This shall be achieved through the following policies:

Policy 1 Support the vitality and viability of existing town and village centres and facilitate a competitive and healthy retail environment by ensuring that future growth in retail floorspace responds to the identified retail hierarchy.

Policy 2 Assess all retail planning applications against the criteria set down in the Retail Strategy for County Monaghan and the Retail Planning Guidelines for Planning Authorities, 2012 and the accompanying Retail Design Manual.

Policy 3 Support the development of, and to reinforce the role and function of the core retail areas and to direct retail development to serviced areas.

Policy 4 The preferred location for large scale retail developments is in town centres, with an explicit presumption against large out of town retail centres, in particular, those located adjacent or close to existing, new or planned national roads/motorways, and alternative locations may only be considered in accordance with the Sequential Test, as required under the Retail Planning Guidelines for Planning Authorities, 2012 (DECLG).

Policy 5 Promote and encourage the enhancement of retail floorspaces and town centre functions in order to reduce retail expenditure leakage out of the County and to sustain competitiveness of retail centres in the County.

Policy 6 Encourage reuse of vacant town centre commercial premises for alternative uses and adapt a flexible approach to reoccupation, particularly where this can complement the existing service base, Further to the policies above of ensuring the orderly development of retail floorspace, objectives related to encouraging a healthy retail environment are detailed below:

Objective 2 **Facilitate the reuse of derelict land and vacant buildings within town centres for retail uses, subject to the provisions of the sequential test.**

Objective 3 **Address retail expenditure leakage out of the County to competing town centres by working collaboratively with local groups to develop the retail offering in the County within key retail sectors where this leakage occurs.**

Objective 4 **Encourage and facilitate innovation and diversification of the County's retail offer, including tourism, agri-tourism and crafts related ventures and markets where appropriate.**

Objective 5 **Improve the public realm of urban centres through the encouragement of high quality design.**

Objective 6 **Ensure that all new retail and commercial development proposals respect the character and scale of the existing streetscape.**

Objective 7 **Encourage the retention of and/or reinstatement of traditional shopfronts, where appropriate.**

Objective 8 **Improve the accessibility of town centres by encouraging a pedestrian and cyclist friendly environment.**

Objective 9 **Promote complementary non-retail uses in town centres, particularly where this can encourage cross-visitation.**

Objective 10 **Promote activities that will bring enhanced footfall, such as festivals, events and farmers' markets in town centres**

5.5 Criteria for the Assessment of Future Retail Development

All planning applications for significant retail development should be assessed against a range of relevant criteria.

The Retail Planning Guidelines for Planning Authorities, 2012 provide the main principles for assessing new retail proposals. The Guidelines state that the main planning considerations for retail development include;

1. Location (site selection);
2. Suitability of use (land use zoning and specific objectives);
3. Size and scale (impact, form and design);
4. Accessibility (access and servicing arrangements).

In line with the Guidelines **the preferred location for retail development is within existing town centres and the identified retail hierarchy**. Development proposals not according with this must demonstrate compliance with the sequential approach and provide a Retail Impact Statement. Transport Impact Assessments may also be required for significant retail developments which may impact on the vitality and viability of town centres.

5.6 The Sequential Test

All applications for retail developments at edge-of-centre or out-of-centre locations will be subject to the sequential test, where the following applies:

The Retail Planning Guidelines state that the order of priority for the sequential approach is to locate retail development in the city/town centre (and district centre if appropriate), and only to allow retail development in edge-of-centre or out-of-centre locations where all other options have been exhausted. Where retail development in an edge-of-centre site is being proposed, only where the applicant can demonstrate and the planning authority is satisfied that there are no sites or potential sites including vacant units and/or assembly of land parcels, within a city or town centre or within a designated district centre that are (a) suitable (b) available and (c) viable, can that edge-of-centre site be considered.

Where retail development on an out-of-centre site is being proposed, only in exceptional circumstances where the applicant can demonstrate and the planning authority is satisfied that there are no sites or potential sites either within the centre of a city, town or designated district centre or on the edge of the city/town/district centre that are (a) suitable (b) available and (c) viable, can that out-of-centres site be considered.

5.7 Retail Impact Assessments

Retail Impact Assessments will be required for significant sized retail development where due to its scale and/or location, it may impact on the vitality and viability of centres. These assessments will be prepared in accordance with the current Retail Planning Guidelines, which requires an applicant to address the following criteria and demonstrate whether or not the proposal would:

- Support the long-term strategy for city/town centres as established in the retail strategy/development plan, and not materially diminish the prospect of attracting private sector investment into one or more such centres;
- Have the potential to increase employment opportunities and promote economic regeneration;
- Have the potential to increase competition within the area and thereby attract further consumers to the area;
- Respond to consumer demand for its retail offering and not diminish the range of activities and services that an urban centre can support;
- Cause an adverse impact on one or more city/town centres, either singly or cumulatively with recent developments or other outstanding planning permissions (which have a realistic prospect of implementation) sufficient to undermine the quality of the centre or its wider function in the promotion and encouragement of the arts, culture, leisure, public realm function of the town centre critical to the economic and social life of the community;
- Cause an increase in the number of vacant properties in the primary retail area that is likely to persist in the long term;
- Ensure a high standard of access both by public transport, foot and private car so that the proposal is easily accessible by all sections of society: and/or
- Link effectively with an existing city/town centre so that there is likely to be commercial synergy

Proposals for new retail floor space shall be accompanied by a written statement demonstrating how it complies with national and county retail planning policies. In addition any development which exceeds any of the thresholds identified in the table below shall be accompanied by a Retail Impact Statement, as set out in Annex 5 of the Retail Planning Guidelines for Planning Authorities, 2012.

Table 5.1 Retail Floorspace Thresholds

Hierarchy Level	Floorspace Threshold Convenience	Floorspace Threshold Comparison
1	1,000	1,000
2	500	1,000
3	500	500
All other retail development	200	200

In addition, the planning authority will require the submission of a Retail Impact Assessment, where in its opinion a development proposal, which falls below the identified threshold, may impact adversely on the vitality or viability of town centres, or exceed the identified floor space capacities as laid out in Table 4.14.

The level of detail required in the Retail Impact Assessment (RIA) will be determined by the nature and type of proposal, for example, for the lower floorspace threshold levels all steps of the RIA will not be required and/or a significantly lesser details will be required. The level of detail required may be advised by the Planning Authority in pre-planning discussions.

5.8 Traffic and Transport Assessments

A Traffic and Transport Assessment (TTA) may be required for retail developments over a particular threshold (1,000 m2 gross floorspace for retail/leisure) as set out in the Traffic Management Guidelines 2012 (DELG, DoT and DTO), and the Traffic and Transport Assessment Guidelines 2014 (National Roads Authority). The Planning Guidelines on Spatial Planning and National Roads 2012 (DECLG) set out additional advice and requirements in relation to transport matters.

A TTA must examine the transport impacts of a proposed development, incorporating any subsequent measures necessary to ensure roads, junctions and other transport infrastructure in the vicinity of the development are adequate to accommodate the proposed development without causing additional delays to existing and future road based traffic. More importantly, TTA is important in demonstrating how to encourage a shift towards sustainable travel modes by those using the retail development in question.

5.9 Criteria for the Assessment of Different Development Types

5.9.1 Large Convenience Goods Stores

The Retail Planning Guidelines set a 3,000 m2 retail floorspace cap on food store development outside the four Dublin local authority areas, and the cities of Cork, Limerick/Shannon, Galway and Waterford. This retail floorspace cap applies to new retail stores or extensions to existing stores which will result in an aggregate increase in the net retail floorspace of the convenience element of such retail stores. In this regard, while some stores may retail convenience goods only, in other cases, stores may retail convenience and comparison goods. In these mixed comparison/convenience retailing stores, there is therefore no cap on the amount of non-grocery or comparison space delineated for the relevant store, for example on the planning application drawings.

5.9.2 Retail Warehousing

Retail warehouse complexes generally comprise an agglomeration of retail warehouses grouped around a common car park selling mainly bulky household goods. There is an expectation that most of the goods purchased can be transported off-site by the customer and because of this they are generally located on the edge or outside of the built-up urban area.

The key consideration in determining the distribution of floorspace is defining the appropriate and sustainable location of retail activities. In accordance with the Retail Planning Guidelines there should be a presumption against the further development of out of town retail parks and a preference for sites on or adjacent to town centres to ensure the potential for linked trips and commercial synergy. Key criteria for the assessment of retail warehouse applications include scale and design of the development, appropriate vehicular access and the quantitative need for such development. The Retail Planning Guidelines state that individual retail units should not be less than

700 sq. m. and not more than 6,000 sq. m. in size. These figures are gross floor area, including storage and garden centres. It is essential that the range of goods sold is restricted by planning condition to bulky household items. While it is acknowledged that there are ancillary items associated with an otherwise bulky good, e.g. computer software, printer, it is recommended that the retail floorspace devoted to such ancillary products should not exceed 20% of the total net retail floorspace of the relevant retail unit and such space to be clearly delineated on the planning application drawings.

Given the volume of vacant retail warehousing in the county, there should be limited demand for further development under the life of this strategy.

5.9.3 Local Retail Units and Neighbourhood Centres

Local shops serve local communities and have significant social and economic functions in improving access to local facilities especially for the elderly and persons with mobility impairments, families with small children, and those without access to private transport. In some settlements and urban populations, there is a need to enhance the convenience retail offer, along with other non-food outlets, such as retail pharmacies. Along with considering the role and function of the settlement in the retail hierarchy, and where the local importance of such units can be substantiated, the planning authority should support the provision of such units.

5.9.4 Casual Trading

Casual trading, including farmers' markets, can make a valuable contribution to the local economy and contribute to the vitality and viability of a retail centre. Such activities should be properly regulated as per the provisions of the Casual Trading Act 1995 and consideration should be given to the quality of offer of such casual trading.

5.9.5 Retailing and Motor Fuel Stations

Convenience shops are part of the normal ancillary services provided within motor fuel stations. In rural areas, they can have a very important function as the local shop of small supermarket. However, such shops should remain on a scale appropriate to the location, and their development should only be permitted where the shopping element of the station would not seriously undermine the approach to retail development in the development plan.

The floorspace of the shop should not exceed 100 m2 net; where permission is sought for a floorspace in excess of 100 m2, this shall be considered as a cumulative retail unit and will be assessed as such.

5.9.6 Retailing in Rural Areas

Few proposals for additional retail space in rural areas are expected over the lifetime of the Plan with a growing concern for retaining of the existing retail base. Proposals for retailing in rural areas should be directed towards existing settlements; however, in certain circumstances retail development in rural areas may be appropriate. These include:

1) A retail unit which is ancillary to activities arising from farm diversification;
2) A retail unit designed to serve a tourist or recreational facility, ancillary to the main use;
3) A retail unit attached to a craft workshop;
4) A small scale retail unit (not in excess of 100 sq. metres gross) designed to serve a dispersed rural community

Such proposals should be considered on their merits in accordance with the proper planning and sustainable development of the area. In considering such proposals along National Roads, regard shall be had to objective NR0 7 of the development plan to prohibit intensification of use or new accesses onto the national road network.

Appendix I: References

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