MEATH COUNTY RETAIL STRATEGY

Adopted by:

Meath County Council	**3 October 2003**
Navan Town Council	**7 October 2003**
Trim Town Council	**14 October 2003**
Kells Town Council	**20 October 2003**

Meath County Council and the Town Councils of Navan, Trim and Kells

MEATH COUNTY RETAIL STRATEGY

A Report
by

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EXECUTIVE SUMMARY

1. **DTZ Pieda Consulting** was appointed in March 2002 by Meath County Council to prepare the Retail Strategy for the County. As Meath is part of the Greater Dublin Area (GDA), the County Council is required to prepare a detailed retail strategy, which is more detailed than that necessary for more rural locations of the country. The retail policies and proposals that emerge from the Retail Strategy require to be incorporated in development plans. The Retail Planning Guidelines for Planning Authorities (2000) (RPG) state that the matters that are to be included in all future development plans are:

   i *Confirmation of the retail hierarchy, the role of centres and the size of the main town centres;*

   ii *Definition in the development plan of the boundaries of the core shopping area of town centres;*

   iii *A broad assessment of the requirement for additional retail floorspace;*

   iv *Strategic guidance on the location and scale of retail development;*

   v *Preparation of policies and action initiatives to encourage the improvement of town centres; and*

   vi *Identification of criteria for the assessment of retail developments.*

2. Founded on the other principles set out in the RPG and the strategic context of the GDA Retail Planning Strategy, the focus of the County Strategy has been these six factors.

BASELINE FOR THE STRATEGY

3. The baseline information for the County Retail Strategy is derived from the GDA Retail Planning Strategy, revised as appropriate by up to date and relevant information. The detail of the baseline information that is specific to the Meath County Retail Strategy is contained in a separate Technical Appendix. This report – the County Retail Strategy – examines the key baseline information in respect of the demographic profile, retail floorspace and shopping patterns in the County.

4. **Demographic Profile:** there has been significant population growth in the County in recent years, largely driven by the boom in economic activity and expansion of population in the GDA. Based on the preliminary results of the 2002 Census of Population, over the period since the last Census, the County's population is now over 133,000 which is well in excess of the Strategic Guidelines for the GDA forecasts.

The increase is at 22.1% is in fact the highest in the State and is set to continue over the period of the Retail Strategy.

5. **Retail Floorspace:** of the total floorspace in the GDA, 7% is within Meath which has the largest amount next to Dublin in the GDA. There was some **70,790m²** of retail floorspace in Meath at 2001. This comprised of the order of 33.7% convenience, 49.6% comparison and 9.7% retail warehousing. Some 6.9% of total floorspace was vacant which is relatively low level and an important positive indicator of the overall health of the County's centres and retail sector.

Composition of Retail Floorspace 2002 (m²)			
Centre	**Convenience**	**Comparison**	**Retail Warehousing**
Ashbourne	2,074	982	-
Athboy	795	1,125	-
Bettystown	2,450	450	-
Duleek	1,127	420	-
Dunboyne	690	885	-
Dunshaughlin	784	1,454	600
Kells	1,811	3,410	-
Laytown	585	40	-
Navan	8,018	18,040	5,193
Oldcastle	1,727	2,238	1,100
Ratoath	191	624	-
Slane	600	513	-
Trim	3,026	4,957	-
Total	**23,878**	**35,138**	**6,893**

6. **Shopping Patterns:** as part of the GDA Retail Strategy shopper and household surveys were undertaken, the objective of which was to identify current shopping patterns. From these surveys, it is estimated that approximately 92% of convenience expenditure by the resident population is spent in retail outlets located in Meath. The proximity of many Meath residents to Dublin City Centre means a much lower proportion of comparison expenditure – some 45% – is retained in the County.

BROAD ASSESSMENT OF ADDITIONAL FLOORSPACE CAPACITY

7. The capacity assessment is the mechanism used to estimate the amount of additional expenditure that will occur in the County over the period of the GDA Strategy (to 2011) and the type and amount of additional floorspace that will be required in order to accommodate this expenditure. This exercise was carried out for Meath as part of the GDA Retail Strategy. It has been updated to incorporate changes to population and extant planning permissions.

8. The figures set out in the table below provide an indication as to the capacity for additional net retail floorspace in the County. These figures make allowances for any planned development of new retail outlets, turnover efficiency growth and the impact of the growth in Internet sales.

Indicative Net Floorspace Potential in County (m^2 net)				
Period	**Convenience**		**Comparison**	
	Low	**High**	**Low**	**High**
2002-2006	4,300	5,000	14,100	18,900
2007-2011	6,400	7,100	21,600	29,600
Total	**10,700**	**12,100**	**35,700**	**48,500**

RETAIL DEVELOPMENT POTENTIAL

9. A review of the influencing factors at settlement level was undertaken to determine the retail potential of the main centres in the County to accommodate additional retail floorspace.

10. **Level 2 – County Town Centre** - Navan is a Level 2 County Town Centre in the GDA hierarchy. In the early years of the Strategy, there is scope and potential for additional retail floorspace to be located in and around the core retail area. Taking a longer term view, and one that goes to and beyond 2011 – the timescale of the County Retail Strategy, it has to be recognised that Navan is set to become an even more major town in both the GDA retail hierarchy and national settlement hierarchy. The existing town centre will be too small to accommodate the quantum and quality of retail floorspace that is needed to support what will be in essence a small city in the national context. Land requires to be identified for an expansion of the town centre.

11. **Level 3 –Sub-County Town Centres** - Ashbourne, Kells and Trim are the County's Level 3 Town and Sub-County Towns. To date Ashbourne is the only one of the three which has benefited from substantial town centre development. In the period of the Strategy, there are opportunities in all three town centres that will play an important role in enhancing their retail offer and importance. Given the characteristics of the town centres, it would not be desirable to locate retail warehousing within the three town centres and in accordance with the guidelines edge of centre and out of centre locations will require to be looked to.

12. **Tier 1 Level 4 – Small Town Centres** - As a general rule, Small Town Centres in the County Retail Hierarchy are not centres where new large scale retail development is envisaged within the County although this requires to be balanced against the envisaged size that each of these centres will grow to over the timescale of the Strategy. Noting this, review of the scope and potential of all of the Tier 1 Level 4

centres indicates that needs and potential will on the whole be able to be met within the heart of each of the centres – Athboy, Bettystown, Duleek, Dunboyne, Dunshaughlin, Oldcastle and Ratoath. However, as all of the centres are set to grow over the period to 2011 then this position requires to be monitored.

13. **Tier 2 Level 4 – Village Centres** - Our review of all of the Tier 2 Level 4 centres in the County Retail Hierarchy indicates that all potential needs can be met within the village centres and thus will be in accord with the requirements of the sequential approach.

14. The assessment of the centres highlights a deficiency in retail warehousing floorspace in comparison to other counties in the GDA. This requires to be redressed in the County Retail Strategy.

STRATEGIC RESPONSE – THE COUNTY RETAIL STRATEGY

15. The **aims** of the County Retail Strategy set the framework for the **strategic** policies and **specific policies** and **proposals**. They provide a clear definition of the purpose of the Strategy and what it is intended to achieve. They are:

- **Objective 1:** To sustain and improve the retail profile and competitiveness of County Meath within the retail economy of the GDA and beyond.

- **Objective 2:** To address leakage of retail expenditure from the County by providing the means to strengthen the range and quality of its retail offer.

- **Objective 3:** To ensure an equitable, efficient and sustainable spatial distribution of main centres across the County.

- **Objective 4:** To confirm a hierarchy which assists in defining the County's settlement structure and objectives and provides clear guidance on where major new retail floorspace would be acceptable.

- **Objective 5:** To ensure that the retail needs of the County's residents are met as fully as possible within Meath, taking due cognisance of the GDA Strategy hierarchy.

- **Objective 6:** To encourage and facilitate the preservation and enhancement of the retail role of both individual villages and village/settlement clusters around the County.

- **Objective 7:** To encourage and facilitate the re-use and regeneration of derelict land and buildings for retail uses, with due cognisance to the Sequential Approach.

- **Objective 8:** To promote and sustain the importance of retailing in the County's tourism economy.

- **Objective 9:** To encourage and facilitate innovation and diversification in the County's retail profile and offer.

- **Objective 10:** To provide the criteria for the assessment of retail development proposals.

STRATEGIC POLICY FRAMEWORK

16. To achieve the Strategy's aims requires due cognisance to be taken of the strategic policy framework that underpins specific policy proposals. This framework is set by the retail hierarchy, the core retail area, the sequential approach, the spatial distribution of new floorspace and the consideration of need. The **retail hierarchy** is set out below.

Meath County Retail Hierarchy		
	METROPOLITAN AREA	HINTERLAND AREA
LEVEL 2	**Major Town Centres**	**County Town Centres**
		Navan
LEVEL 3	**Town and/or District Centres (1)**	**Sub-County Town Centres**
		Ashbourne, Kells and Trim (noting Drogheda and Kilcock Environs)*
LEVEL 4	**Neighbourhood Centres**	**Local Centres – Small Towns and Villages**
		Tier 1 Small Town Centres: Athboy, Bettystown, Duleek, Dunboyne, Dunshaughlin, Ratoath and Oldcastle ***Tier 2 Village Centres*** Ballivor, Clonee, Enfield, Nobber, Laytown and Slane
LEVEL 5	**Corner Shops**	**Smaller Village Centres/ Crossroads**
		smaller villages/ crossroads - rural shops (post offices, creameries, public houses, petrol filling stations etc.)
Note – definitions are set out in Section 4. * Drogheda is a Level 1 Tier 3 centre in the national retail hierarchy and Kilcock is a Level 3 centre in the GDA hierarchy. These designations are specific to the town centres and their roles but their environs will also be areas for retail development. Both are noted within the County Retail Hierarchy as parts of their environs are within the County's boundaries.		

17. **Core Retail Area:** the definition of the Core Retail Area of main centres is required by the RPG. The Strategy identifies Core Retail Areas for the towns in the top two levels of the hierarchy – Navan, Ashbourne, Kells and Trim. (Refer to Appendix C for maps illustrating the Core Retail Areas and Core Town Centre Areas of Navan, Ashbourne, Kells and Trim).

18. **Sequential Approach:** policies and proposals in respect of the location of retail development must be in accordance with the principles set by the sequential approach in the RPG where the priority is town centres, then edge of centre and finally out of centre locations. The Core Retail Area is thus an important determinant in the approach.

19. **Spatial Distribution of New Retail Development:** the emphasis of the Strategy is on strategic guidance on the location and scale of major retail development. It does not seek to inhibit small scale retail development in centres around the County, particularly in smaller centres. The retail hierarchy sets the framework for the spatial distribution of the quantum of convenience and comparison floorspace.

20. **Consideration of Need:** At present, retention and attraction of convenience expenditure is on par with the majority of other counties outside of Dublin City in the

GDA. However, the County is experiencing relatively high levels of comparison expenditure leakage, although this is below that of the majority of the other counties within the GDA with only Wicklow faring better. This can be attributed largely to the relative distance of Navan from the City Centre and the major shopping centres around the M50. Expenditure will continue to leak to Dublin City Centre, the major shopping centres around the M50 and to Mullingar due to the attraction of the Lakepoint Retail Park and the deficiencies in the quality and quantum of the County's retail warehousing floorspace. The quantitative assessment indicates that in this period there is the need to enhance existing provision by the order of 1.5 and 2.7 times of existing retail floorspace for convenience and comparison floorspace respectively. Additionally, it is recognised that delivery of the quantum of floorspace is not the baseline but the quality of the offer if the County is to sustain its role and competitiveness. In order to sustain and improve the County's competitive position, then the Strategy must provide the policies and proposals which facilitate this.

STRATEGIC POLICIES

21. Strategic Policies relate to the spatial distribution of centres, their role in the hierarchy and the strategic aims of the strategy. These are summarised in the table below.

Summary of Strategic Policies	
Policy Reference	**Policy**
Policy RS1: County Town Centre – Navan	*It is the policy of the Council to promote and encourage major enhancement and expansion of retail floorspace and town centre functions in Navan to sustain its competitiveness and importance as a County Town Centre in the GDA*
Policy RS2: Sub-County Town Centre – Ashbourne	*It is the policy of the Council to promote and encourage continued enhancement and expansion of retail floorspace and other commercial development in Ashbourne to encourage its development as a self-sustaining key centre in the south of the County*

Summary of Strategic Policies (contd.)	
Policy RS3: Sub-County Town Centre – Kells and Trim	*It is the policy of the Council to promote and encourage major enhancement and expansion of town centre functions to sustain the competitiveness and importance of Trim and Kells as Sub-County Town Centres and also to ensure that their unique heritage becomes integral to the offer and attraction of both towns*
Policy RS4: Drogheda and Kilcock Environs	*It is the policy of the Council to work with Louth and Kildare County Councils and Drogheda and Kilcock Town Councils to ensure that the retail needs of the populations in the expanding environs of Drogheda and Kilcock that are located within County Meath are met in a way that is efficient, equitable, efficient and sustainable*
Policy RS5: Small Town Centres – Tier 1 Level 4	*It is the policy of the Council to facilitate and encourage the provision of shops and services that consolidate the strength of Tier 1 Level 4 Small Town Centres to meet the needs of the existing and expanding population*
Policy RS6: VillageCentres – Tier 2 Level 4	*It is the policy of the Council to facilitate the local provision of shops and services in Tier 2 Level 4 Village Centres to meet the needs of existing and expanding populations*

GENERAL POLICIES

22. General Policies promote the retail planning principles that should be applied across all levels of the hierarchy.

Summary of General Policies	
Policy Reference	**Policy**
Policy RS8: Re-Use and Regeneration of Derelict Land and Buildings	*It is the policy of the Council to encourage and facilitate the re-use and regeneration of derelict land and buildings*
Policy RS9: New District and Neighbourhood Centres	*It is the policy of the Council to encourage and facilitate the development of new District and Neighbourhood Centres to meet the needs of new and growing centres of population*
Policy RS10: Retailing in Tourism and Leisure	*It is the policy of the Council to encourage and facilitate the development of retailing within the tourism and leisure sectors*
Policy RS11: Corner Shops and Smaller Villages/Crossroads	*It is the policy of the Council to retain, encourage and facilitate the retail role of corner shops and small villages around the County*
Policy RS12: Enhancement of Towns and Villages	*It is the policy of the Council to encourage and facilitate the enhancement and environmental improvement of the County's towns and villages*

1. INTRODUCTION

1.1 **DTZ Pieda Consulting** was appointed in March 2002 by Meath County Council to prepare the Retail Strategy for the County. This document sets out the County Retail Strategy for the County.

CONTEXT

1.2 The context for the County Retail Planning Strategy (the Strategy) is set by the following:

i The Department of the Environment and Local Government (DoELG) Retail Planning, Guidelines for Planning Authorities (2000); and

ii The Greater Dublin Area (GDA) Retail Planning Strategy, November 2001.

1.3 In addition, there are a number of influences and considerations that require to be taken into account when preparing the Strategy. These have been set out in the Retail Planning Strategy for the GDA, both in the main report and the supporting Working Papers. They are not replicated in the Strategy but are referred to as appropriate. It is however important to highlight what these influences and considerations are:

- Strategic Planning Guidelines (SPG) for the GDA (1999) and subsequent reviews
- Dublin Transportation Office Transportation Strategy – 'A Platform for Change'
- Statutory Development Plans/Local Area Plans
- County Development Board Integrated Strategy(Le Cheile)/Other Relevant Council Policy Frameworks
- Shopping patterns and consumer and market demand
- Retail trends
- Consultation responses.

Retail Planning, Guidelines for Planning Authorities (2000) for Local Authorities

1.4 In accordance with the *'Retail Planning, Guidelines for Planning Authorities (2000) for Planning Authorities'*, published by the DoELG in December 2000, Meath County Council is required to prepare a Retail Strategy for the County. The guidelines were issued as Ministerial Guidelines under Section 28 of the Planning and Development Act 2000. Section 28 provides that planning authorities and An Bord Pleanála shall have regard to Ministerial guidelines in the performance of their functions.

1.5 The Retail Planning, Guidelines for Planning Authorities (2000) (RPG) were prepared in response to the increasing pressure for retail development in the last decade. They sought to provide the policy framework to enable the future development that is projected to be accommodated in a way that is *'efficient, equitable and sustainable'*.

1.6 The RPG recognise that the detail and complexity required to address retail planning issues vary depending on the extent of urbanisation, population density and number of centres. They state that:

> *'In Metropolitan Dublin, Cork and other major urban centres, there is a far greater requirement for detailed development plan policies than in largely rural centres.'*

1.7 As Meath is part of the GDA, the County Council is required to prepare a **detailed retail strategy, which** is more detailed than that necessary for more rural locations in the country. The RPG also highlight that in some locations that it will be necessary for counties to co-operate with each other in the preparation of retail strategies and identify where this would be appropriate. In the case of Meath, the Council was required to co-operate with the counties within the GDA which is an area defined by the SPG and comprises Dublin (Dublin City, Dun Laoghaire-Rathdown, Fingal and South Dublin) and Mid East (Kildare, Meath and Wicklow) Regions. The consequence was the preparation of the *'Retail Planning Strategy for the Greater Dublin Area'* which was published in November 2001. The context this provides for the County Retail Planning Strategy is described below.

1.8 Whether a detailed or general strategy is necessary, the retail policies and proposals that emerge from the retail strategies require to be incorporated in development plans. The guidelines state that the matters that are to be included in all future development plans are:

i *Confirmation of the retail hierarchy, the role of centres and the size of the main town centres;*

ii *Definition in the development plan of the boundaries of the core shopping area of town centres;*

iii *A broad assessment of the requirement for additional retail floorspace;*

iv *Strategic guidance on the location and scale of retail development;*

v *Preparation of policies and action initiatives to encourage the improvement of town centres; and*

vi *Identification of criteria for the assessment of retail developments.*

1.9 Founded on other principles set out in the RPG and the strategic context of the GDA Strategy, the focus of the Strategy has been these six factors.

Retail Planning Strategy for the Greater Dublin Area

1.10 DTZ Pieda Consulting, in association with DTZ Sherry FitzGerald and Brian Meehan & Associates, was commissioned in May 2000 to prepare the Retail Planning Strategy for the GDA (GDA Strategy). The report was published in November 2001. The GDA Strategy is designed to ensure there is a sufficiency of retail floorspace to accord with population and expenditure growth and that, consistent with the RPG, it is located in an *'efficient, equitable and sustainable manner'*.

1.11 Prior to summarising what the GDA Strategy comprises and the context that it provides for the County Retail Strategy, it is important to highlight the scope of the GDA Strategy. It is made clear in the GDA Strategy's Executive Summary that:

> *'The Strategy will not however be an end in itself, its primary purpose is to inform the statutory planning process and in particular, to ensure that future Development Plans make adequate provision for retail development. To assist this, the Strategy is required to provide indicative advice on the scope for new development and how associated floorspace should be distributed.'*

1.12 In essence, the GDA Strategy provided the baseline and the strategic principles to be taken through at the county level into detailed retail strategies. Of importance in the preparation of this Strategy are the following policy influences set down in the GDA Strategy:

- *The protection of Dublin City Centre*
- *Strengthening the role of other centres, particularly "development centres" in the Hinterland Area and selected nodes in the Metropolitan Area*
- *The distribution of new retail floorspace to broadly reflect the distribution of population growth, where market conditions allow*
- *The need to reduce the demand for travel and the consequential support for centres well served by local transport services across their catchment areas*
- *The desire to facilitate a competitive retail industry and to encourage retail innovation.*

1.13 Each of these policy influences has implications for both the GDA Strategy and consequently the county retail planning strategies being produced around the GDA. These are specifically identified as:

i *The distribution of new floorspace should be linked to the existing and future retail hierarchy for the GDA and should be appropriate in scale and character to the hierarchical role of the centre;*

ii *Some forms of retailing may be inappropriate for a town centre location and, in the interests of enhancing choice, competition and innovation, they should be accommodated in locations offering good levels of accessibility by both private and public transport;*

iii *The desire to protect the role of Dublin City Centre, specifically its high order comparison shopping role, implies that there will be limited opportunity for high order comparison retailing beyond Dublin City Centre;*

iv *Linking the distribution of retailing and population is likely to be far more practical in the convenience, rather than the comparison sector. The latter tends to operate through a stricter hierarchy, with levels of service towards the upper end of the hierarchy being determined by levels of catchment population which are often not available in non-urban areas; and*

v *It follows that whereas a principle can be expressed which favours the retention of high levels of locally generated expenditure that principle will be easier to follow in the convenience sector than in the comparison sector.*

1.14 From these influences and principles, the GDA Strategy identifies the following:

- The GDA retail hierarchy, specifically the upper levels
- Application of the regional hierarchy at a settlement level, again the emphasis is on upper level settlements
- The parameters for considering retail formats outside of the formal hierarchy
- The type of shopping appropriate to different levels in the hierarchy
- The need to target the retention of expenditure outflow as a means for reducing the need to travel and thus enabling more sustainable shopping patterns
- The principles underpinning the county retail strategies.

1.15 These have all been given due consideration in the preparation of this Strategy and will be further highlighted as appropriate. It is however important to briefly summarise the key strands and principles defined for the county retail strategies:

i The starting point is to assume that whilst expenditure available will increase across the GDA over the period of the GDA Strategy, by virtue of growth in population and per capita spend per head, the net share will stay constant;

ii The GDA Strategy is dependent upon the accessibility improvements and demand management measures proposed in ‘A Platform for Change’ being delivered – where this is not possible, expenditure and turnover capacity will be freed up for redistribution around the GDA, primarily but not exclusively in the Metropolitan Area;

iii The effectiveness of the GDA Strategy will also depend on the provision of a level of car parking appropriate to the role of each shopping centre within the hierarchy;

iv The retail strategies for each county are required to address the significant differences in the role and function of shopping centres throughout the GDA;

v Dublin City Centre is the preferred centre for most higher order shopping and the county reports within the GDA Strategy support this – these are both summarised in the GDA Strategy and provided in the appendices to the strategy;

vi The Metropolitan County parts of Dublin Region (Dun Laoghaire-Rathdown, Fingal and South Dublin) have close links to Dublin City Centre which will be strengthened by proposed improvements to public transport systems and the road network. Additionally, they provide a range of intervening shopping opportunities for the residents of the Hinterland Counties who would otherwise have to access Dublin City Centre for all higher order comparison retailing;

vii Because of the emphasis on town centres, their redevelopment and expansion should be encouraged by offering some flexibility in the application of floorspace limits;

viii There are indications of over-trading in the convenience sector and where it exists it represents a further reservoir of expansion potential;

ix Shopping centre development can be a lengthy process bearing in mind the necessary timescales for design, land acquisition, the securing of the necessary authorisations and key lettings, plus construction and fitting out. The town centre environment is recognised as often presenting the most acute challenges that can further lengthen the development process. In such circumstances, it would be quite legitimate to take account of expenditure capacity beyond 2006 in considering the scope for emerging major development proposals;

x The promotion of retail development will tend to take account of local circumstances including varying population and socio-economic characteristics, population growth rates and consumer spend estimates; and

xi The existing level of retail warehousing provision consumes around 15% of comparison expenditure and this represents a reasonable planning target.

1.16 The GDA Strategy has provided the most comprehensive baseline information for the generation of the regional retail strategy and each of the county retail strategies. This information includes:

- Population and expenditure forecasts to both 2006 and 2011.

- A comprehensive retail floorspace survey of all centres, groups of shops and retail warehouse parks in the GDA. It excludes standalone premises. This information is held on a geo-coded data base by all the local authorities in the GDA.
- Some 3,750 household telephone interviews to ascertain the shopping patterns of residents in the GDA. The way that the information was gathered and collated has enabled the patterns to be discerned at county level.
- Street face-to-face interviews in 10 key centres in the GDA (and Drogheda in view of the influence/draw it has on shopping patterns in the north of the GDA). Some 4,250 interviews were undertaken. This provided information on the level of import of spend from people who were not residents of the GDA. This survey too was designed to provide information at a county level.
- An inventory of all extant planning permissions and pending applications. This enabled details of how much retail floorspace was in the pipeline to be taken into account in the quantification of capacity for further floorspace.

1.17 This information is publicly available in the following documents and has provided the baseline for this Strategy, with up dates as appropriate:

i Consultation Report (May 2001);

ii Retail Planning Strategy for the Greater Dublin Area (November 2001);

iii Annex 2 to GDA Strategy; and

iv Working Papers 1-8, GDA Strategy.

1.18 The preparation of the GDA Strategy was advertised in the national press and comments/submissions on the brief invited. This was followed by two public consultation meetings on the Consultation Report in May 2001. These meetings were again advertised in the national press. The document was published on the SPG website (http://www.spggda.ie) and comments/submissions were invited in advertisements placed in the national press. Consultations were also held with Councillors at both the regional and county levels on the key findings from the baseline review and assessment in May and June 2001.

STUDY APPROACH

1.19 It has been highlighted that the preparation of this report has been commissioned in order that the requirements of the RPG can be met at county level through the preparation of a detailed county retail strategy. Preparation of the Strategy addressed the following:

- Ensuring that the six requirements set out under paragraph 36 of the RPG were met (provided under paragraph 1.8 above)

- Application of the quantitative and qualitative information and strategic principles of the GDA Strategy at the County level.

It should be highlighted that Appendix A provides a Glossary of the Terms used in the Strategy and all supporting documentation.

1.20 The framework that was adopted to undertake this work is summarised below:

- **Stage 1:** Review & Assessment
- **Stage 2:** Option Appraisal
- **Stage 3:** Policy Review
- **Stage 4:** Strategy Formulation
- **Stage 5:** Reporting.

Stage 1: Review & Assessment

1.21 The study commenced with an **Inception Meeting** with the Council Officers. This meeting served to agree the framework for the study, the different components of the approach and the consultation framework. It also enabled discussion and exploration on the key issues that currently prevailed or could do in the future. The components and factors agreed are summarised below.

1.22 **Population Forecasts:** the population basis of county retail planning strategies, set against this and the range of forecasts that have emerged from different studies (such as Land Use and Transportation Studies (LUTS)), was discussed with the DoELG as part of a general consultation on retail planning strategies. The advice of the Department was that development plans should be founded on only one set of population data. As the current basis were housing strategies then that should prevail for county retail planning strategies. The GDA differed from other regions of the country as forecasts are set by the SPG to 2011 and thus for the whole period of the county retail planning strategies within the GDA then these figures should prevail. However, the Department advised that where the housing completion records were up to date then these and the housing strategy forecasts were the appropriate basis for retail planning strategies. Given that in Meath, there has been a higher rate of housing completions than originally forecast, then the figures in the County Housing Strategy were agreed as appropriate with the Council Officers for that period. Thereafter, forecasts should be in line with the SPG. This was agreed in the light of the commitment to review the SPG forecasts in Spring 2003 and the subsequent monitor and review of the GDA Strategy in Autumn 2003. The review of the SPG forecasts in Spring 2003 reflected the timing of the full results of the April 2002 Census of

Population (anticipated Spring/early Summer 2003) and the publishing of the National Spatial Strategy in late 2002.

1.23 **Town Centre Health Checks:** in the GDA Strategy, Navan was one of the ten key centres in the GDA where health checks were undertaken. At the County level, taking account of the RPG requirement to undertake health checks at main centres plus the GDA Strategy retail hierarchy, it was agreed with Council Officers that this health check should be reviewed and updated and that health checks should be undertaken in a further fifteen centres across the County. It was also agreed that for consistency, the format followed in the GDA Strategy for health checks should be adopted.

1.24 **Core Shopping Areas:** following on from the health checks, the core shopping areas for each of the main town centres would be identified. These would be the prime shopping areas in the different development plans for the County and its key settlements.

1.25 **Broad Assessment of Additional Floorspace:** using the updated population forecasts from the County Housing Strategy and revision of the list of extant retail planning permissions in Meath, it was agreed that the figures in the GDA Strategy capacity assessment for the County should be re-run to provide a revised estimate of the indicative additional retail floorspace that could be sustained in the County.

1.26 The findings from the above were compiled in a **Stage 1 Report** which formed the basis of consultation with Council Officers. This enabled detailed examination of both quantitative and qualitative assessments of potential and the issues and opportunities prevailing in the key centres. It provided the direction for the later stages of the work, particularly Stage 2 – the Option Appraisal.

Stage 2: Option Appraisal

1.27 Discussions with Council Officers were held in relation to where major new additional retail floorspace would be most likely located. The following were considered:

i The GDA Strategy retail hierarchy;

ii Key settlements in Meath in the context of retail potential and expenditure capacity in the GDA;

iii The County Development Plan urban settlement structure;

iv Le Cheile – the County Development Board Integrated Strategy to 2012;

v Applications, existing and potential, public transportation and roads infrastructure; and

vi Our initial appraisals from the health checks, site visits and assessment of retail trends and potential.

1.28 In addition, the study was advertised in the Meath Chronicle, Drogheda Independent and Fingal Independent in March/April 2002. The advertisement requested comments on the brief and submissions on potential sites and issues that should be considered in the preparation of the Draft Retail Strategy. The closing date for submissions was set as 30 April 2002. It should be noted that only submissions received prior to the deadline were considered in preparing the Draft Strategy.

Stage 3: Policy Review

1.29 The RPG requires that the policies and proposals emerging from county retail planning strategies be incorporated as variations to development plans. An important part of this process is the review of existing retail policies and proposals in current development plans in order to inform the detail of the variation that requires to be taken forward. This formed Stage 4 of the study. In parallel, we also reviewed the comments and submissions received in response to the public advertisement of the Strategy's preparation.

Stage 4: Strategy Formulation

1.30 The previous stages of the work provided the foundations for the Strategy. From this, the work moved on to strategy formulation. This comprised:

- Setting the framework/foundations for the Strategy
- Definition of policies and proposals
- Definition of sites/areas for retail development with a broad indication of the scale and the timescales involved
- Identification of policies and initiatives to secure town centre and other centre enhancement.

1.31 The outputs of this stage of the study are contained within the document, the Draft County Retail Strategy.

Stage 5: Reporting

1.32 The Draft County Retail Strategy was prepared following consideration of the County Retail Strategy (Draft 1) by Members and Officers of the County and Town Councils. All agreed revisions to the report were incorporated in the Draft Retail Strategy.

1.33 The Draft County Retail Strategy provided the basis of variations to the Meath County Development Plan 2001, East Meath Development Plan 2000, Navan Town Plan 1996, Navan Environs Development Plan 1997, Kells Development Plan 2001 and Trim Development Plan 2002. The Proposed Variations were on public display from 3 June to 25 July 2003 and a total of 14 submissions were received (Appendix B). A Manager's Report was submitted to the Elected Members of Meath County Council, Navan Town Council, Trim Town Council and Kells Town Council. The Elected Members agreed to vary the Development Plans in order to incorporate the Meath County Retail Strategy. The text of the variations to the respective Development Plans are provided in Appendix D.

STRUCTURE OF REPORT

1.34 This report is the County Retail Strategy Main Report. It is supported by a detailed Technical Appendix that provides the key new baseline information, that is information and analysis additional to the GDA Strategy supporting documents previously referred to. Both the Main Report and the Technical Appendix will form the next stage in the sequence initiated by the RPG and hence reference to the GDA Strategy and its supporting annexes and appendices are implicit to the baseline and principles set for the Strategy. These facts noted, the structure of the remainder of the report is as follows:

- **Section 2:** presents a summary of the baseline for the County Retail Strategy
- **Section 3:** provides the revised floorspace capacity assessment
- **Section 4:** reviews and assesses the retail hierarchy for the County and the role that key centres do and should play
- **Section 5:** summarises the key issues and considerations in relation to the main centres in the County and their implications for the County Retail Strategy
- **Section 6:** outlines the aims, strategic framework and policies and proposals of the County Retail Strategy.

2. BASELINE FOR THE STRATEGY

2.1 As has been highlighted in Section 1, key baseline information for the County Retail Strategy is derived from the GDA Retail Planning Strategy revised as appropriate by up to date and relevant information. The latter are related back to the GDA Strategy and its supporting annexes and appendices to illustrate consistency with the regional retail planning strategy and its foundations and objectives. The detail of the baseline information that is specific to the Strategy, as has been noted, is contained in the separate Technical Appendix to this report. This section sets out and examines the key baseline information from the Technical Appendix in respect of:

- i Demographic profile;
- ii Retail floorspace; and
- iii Shopping patterns.

DEMOGRAPHIC PROFILE

2.2 During the preparation of the Strategy, the Central Statistics Office (CSO) published the preliminary estimates from the 2002 Census of Population in July, which records a population of 133,936 persons in Meath. This is an increase of just over 24,200 since 1996, which is an increase of 22.1% and the highest growth rate of all counties in the State. The increase is broadly in line with the population forecasts set out in the County Housing Strategy, as examined further below. In light of this and that the DoELG has advised that local authorities should make use of the population forecasts set out in the county housing strategies, this is the approach which is adopted. Additionally we would highlight that:

- The preliminary Census results are not adopted and the full results will be out in Spring/Summer 2003
- There will be population data and forecasting stemming from the National Spatial Strategy (NSS) which was published in late November 2002.

2.3 In recognition of both these facts, the GDA local authorities have made a commitment to a review of the SPG in Spring 2003 and a subsequent update/review of the GDA Strategy figures founded on the revised SPG. As such, to ensure that the population data and forecasts within the Strategy are consistent with the County Development Plan, the SPG and the GDA Strategy then the preliminary results of the Census are not incorporated in the baseline for the Strategy. Where appropriate, they are however highlighted to ensure that the Strategy takes due account of their implications.

2.4 The population of County Meath was 109,732 persons at the 1996 Census of Population, an increase of 4.1% since the 1991. Meath had 8% of the total population of the GDA in 1996. Table 2.1 presents the population data for the key settlements in the County for 1991 and 1996 and the percentage changes that were experienced. The largest concentration of population is located in Navan, the County Town and its immediate environs.

Table 2.1
Population of Main Centres in Meath

Centre	1991	1996	Absolute Change	% Change
Ashbourne	4,411	4,999	588	13.3
Athboy	1,083	1,172	89	8.2
Ballivor	341	383	42	12.3
Drogheda Environs*	742	786	44	5.6
Duleek	1,718	1,731	13	0.8
Dunboyne	2,392	3,080	688	28.8
Dunshaughlin	1,275	2,139	864	67.8
Enfield	436	566	130	29.8
Kells & Environs	3,539	3,542	3	0.1
Kilcock Environs**				
Laytown-Bettystown-Mornington	3,360	3,678	318	9.5
Navan & Environs	11,706	12,810	1,104	9.4
Oldcastle	847	826	-21	-2.5
Ratoath	593	1,061	468	78.9
Slane	699	688	-11	-1.6
Trim & Environs	4,185	4,405	220	5.3
County	**106,112**	**110,518**	**4,406**	**4.2**

Source: 1996 Census of Population, CSO
Note: * Only the areas of the Drogheda Environs that are within the County are included
** No figures are available for the parts of the Kilcock Environs that are in Meath

2.5 Since 1996, as has been noted above, there has been significant population growth in Meath to a large part driven by the boom in economic activity and expansion of population in the GDA. Total house completions in the County averaged at 1,705 per annum between 1996-2001[1].

2.6 The Meath County Housing Strategy anticipates a population in the County of 130,000 persons in 2001, an increase of 20,268 persons since 1996. A strong rate of growth of around 25% is anticipated up to 2006, with the population increasing by a further 31,000 people to 161,000 persons. Assuming this growth will continue, it is estimated that the population of the County could increase to 180,000 persons by 2011. These assessments are above the figures forecast in the SPG but as is

[1] Annual Housing Bulletin 2001 Department of the Environment & Local Government.

highlighted below they are closer to the preliminary results from the 2002 Census than the SPG.

2.7 In line with the County Urban Settlement Structure set down in the County Development Plan and Le Cheile, the County Development Board Integrated Strategy for Meath to 2012, growth will be directed to three strategic development corridors. The Navan-Trim-Kells and East Meath Corridors are based on road and rail based networks that traverse the County. The third corridor, the South Meath Fringe, forms an arc that has been created as a result of the towns' proximately and accessibility to Dublin. There will also be some increased demand for shops/goods/services in locations across the County remote from these corridors in centres such as Oldcastle.

2.8 The anticipated increase in population has implications regarding the need for and distribution of additional retail floorspace across the County. As a result, the broad assessment of additional floorspace in the following section incorporates the population forecasts when determining the indicative capacity for more retail floorspace in Meath.

RETAIL FLOORSPACE

2.9 Our sister company, DTZ Sherry FitzGerald, carried out the retail floorspace survey of the GDA over a five month period in the latter half of 2000[2]. All towns and villages with a population greater than 1,000 persons were surveyed, although centres with smaller populations were included if they were identified as growth centres in development plans. The survey did not include new retail developments that were under construction/fully trading at the time of the survey. These emerging developments were however included in our quantitative assessments under '*Extant Permissions*' Table 2.2 presents a summary of the floorspace which breaks the information down by both retail category and by totals for the County and its key settlements the GDA Strategy.

[2] Further information on the floorspace survey is provided in Working Paper 4 of the GDA Strategy

Table 2.2
Composition of Net Retail Floorspace 2001 (m^2)

Centre	Convenience	Comparison	Retail W/housing	Total Trading Retail Floorspace	Vacant	Total
Ashbourne	2,074	982	-	3,056	-	3,056
Athboy	795	1,125	-	1,920	516	2,436
Bettystown	2,450	450	-	2,900	310	3,210
Duleek	1,127	420	-	1,547	480	2,027
Dunboyne	690	885	-	1,575	258	1,833
Dunshaughlin	784	1,454	600	2,838	166	3,004
Kells	1,811	3,410	-	5,221	276	5,497
Laytown	585	40	-	625	-	625
Navan	8,018	18,040	5,193	31,251	1,110	32,361
Oldcastle	1,727	2,238	1,100	5,065	650	5,715
Ratoath	191	624	-	815	410	1,225
Slane	600	513	-	1,113	435	1,548
Trim	3,026	4,957	-	7,983	270	8,253
Total	**23,878**	**35,138**	**6,893**	**65,909**	**4,881**	**70,790**

Source: GDA Strategy, November 2001

2.10 The table illustrates that there were some **70,790m²** of retail floorspace in Meath at 2001. This comprised of the order of 33.7% convenience, 49.6% comparison and 9.7% retail warehousing. Retail warehousing floorspace is very low when set against the fact that some 15% of comparison expenditure is on the sector of the retail market. Some 6.9% of total floorspace was vacant which is relatively low level and an important positive indicator of the overall health of the County's centres and retail sector. Of the total, nearly 46% is located in Navan with significantly lower proportions in other key settlements. This rises to 47% when only trading floorspace is examined – that is the total excluding vacant floorspace. Navan's floorspace accounts for 33.6% of total convenience, 51.3% of total comparison and 75% of the total retail warehousing floorspace in the County. Total floorspace and trading floorspace in other main centres is as follows: Trim (11.6% (12.1%)), Kells (7.7%(7.9%)) and Oldcastle (8.0%(7.7%)). At the time of the floorspace survey (Autumn/Winter 2000) Ashbourne had only 4.3% of the County's floorspace and 4.6% of its trading floorspace. With the implementation of extant planning permissions since the survey, Ashbourne's floorspace has significantly increased to a total of 9,487m^2 making it currently the second largest retail centre in the County. Other centres with extant permissions are Navan and Dunshaughlin increasing the net floorspace of both by 2,296m^2 and 1,356m^2 respectively.

2.11 From more detailed analysis of the baseline information from the GDA Strategy floorspace survey, we are able to provide the following facts and analysis on what this information means in terms of the County's profile and performance against the remainder of the GDA particularly the two other Hinterland Area counties of Kildare and Wicklow which are larger and smaller in population than Meath respectively. Given the higher concentrations of population in the Metropolitan Area counties, then it adds little value to any analysis for Meath to be compared with these counties.

2.12 There is currently 1.025m m^2 of trading floorspace (excluding vacancies) in the seven counties that make up the GDA. Of the total, 7.0% is located in Meath which is a higher proportion than Kildare 4.3% and Wicklow 6.4% but less than the Metropolitan Area counties as would be expected. Looking at the different categories of floorspace, of the GDA floorspace, Meath has 7.3%, 7.5% and 5.2% of trading convenience, comparison and bulky goods/retail warehousing floorspace respectively. In terms of convenience floorspace, at 2000 this was more than Kildare (6.3%) but less than Wicklow (8.2%) which is interesting given that Meath is smaller than the former and larger than the latter. The County is performing better than either Kildare (4.1%) or Wicklow (5.1%) with some 7.5% of GDA comparison floorspace (excluding bulky goods/retail warehousing). Its good performance is further highlighted when it is noted that South Dublin has only an 8.2% share. The figures largely reflect the strength of Navan. The County has 5.2% of the GDA bulky goods floorspace/retail warehousing floorspace, which is more than Kildare (1.8%) and less than Wicklow (6.5%).

2.13 At May 2001, which was the cut off point for baseline information for the GDA Strategy, there was an extant planning permission for a town centre scheme in Ashbourne (5,600m^2 gross retail floorspace). This information has been updated during the preparation of the Strategy with information provided by Council Officials. Additional extants (gross) – that is full permissions that can commence development – are for a 2,787m^2 superstore in Ashbourne, 1,695m^2 of comparison floorspace in Dunshaughlin and in Navan a 1,760m^2 extension to Tesco's town centre supermarket and a 1,520m^2 new supermarket. We understand that there are other proposals in the pipeline, which we review in our assessment of retail potential in Section 5.

2.14 Taking account of all extant permissions and assuming that they are/have been implemented, the total current net retail floorspace in the County is estimated at **80,873m^2** of this convenience increases to 34.7%, comparison to of the order of 50.7% and retail warehousing decreases to 8.5% of the total. This further emphasises the low representation of this sector of the market in the County.

SHOPPING PATTERNS

2.15 As has been highlighted in Section 1, as part of the GDA Strategy comprehensive household and street interview surveys were carried out by **Lansdowne Market Research** with the survey results mapped by **GAMMA**. The objective of the surveys was to identify current shopping patterns in the GDA. The surveys play an important role in the capacity assessment by informing the estimates of **market share** (the proportion of retail expenditure by persons living in Meath spent and retained in the County) and **trade draw** (the proportion of turnover in retail outlets in Meath attributable to persons living outside the County).

2.16 A total of **267** street interview surveys were carried out in Navan, conducted between August and October 2000. The interviews were undertaken at different locations within the town centre and on different days and times of the week. This was to ensure that a representative cross-section of shoppers and visitors was 'captured' by the surveys. There were also some **448** households in Meath surveyed by telephone interview. The surveys were undertaken between September 2000 and February 2001 on both weekdays and at weekends. Of particular importance to this Strategy, is that in addition to key centres in the GDA there was also a shopper survey undertaken in Drogheda Town Centre. This was agreed as part of the GDA Strategy baseline as it was perceived that Drogheda had an important influence on the shopping patterns of residents in the north of the GDA. The total number interviewed was **253**. The key findings from the surveys that were specific to Meath included:

- As is the case with other main town centres in the GDA, Navan has a relatively high market share of retail expenditure in that it attracts a large proportion of people living in Meath, particularly from the north and west of the County. However it has a more limited penetration across the GDA due to the proximity of the Blanchardstown Centre, Dublin City and Drogheda.
- Most centres outside Dublin City Centre draw some 75% of their spend from their Local Authority Areas. The exception is Drogheda which has a slightly more dispersed trade draw with 36% of total spend derived from outside of Louth. This reflects the town's location close to the border between Meath and Louth
- From the street interviews in Navan, 91% were from Meath revealing that although Navan functions as important regional 'capital' for the Local Authority Area, it generally serves a more local hinterland and has a more limited catchment area. Of those interviewed in Blanchardstown Shopping Centre 13% were from Meath and of those interviewed in Drogheda 9% were from Meath. In the remaining centres with the exception of Dun Laoghaire Town Centre, between 1-3% were from Meath.
- Navan has 46% market share of available food spend in Meath. Drogheda's is less at 41.7% in respect of its share of its county's spend largely due to the counterbalance of Dundalk in Louth. Both centres emerge as the main top up shopping locations in their respective counties. The Louth County Retail Strategy states that '*the lack of quality convenience shopping in Drogheda results in significant leakage to Dundalk and Navan*'. As figures are not referred to in the Louth County Retail Strategy, it is interesting to note that the GDA surveys for Drogheda only identify 0.7% and 2% leakage to Navan for main food and top up shopping respectively.
- Residents of the County do their clothing and footwear shopping in Navan (22%), Dublin City Centre (29%) and Blanchardstown (22%) with only 4% being lost to Drogheda.
- Navan generates a high proportion of trips by car (79%) and is in fact the highest percentage of all the GDA centres based on the shopper surveys. This is because it is located in a county with a widely dispersed (rural) population and a limited bus network/service where the car represents the most

convenient choice of travel for many people. Only 3% used the bus, which was low but not the lowest in the GDA. Some 16% walked to the town centre, which was low in comparison to the majority of other centres – Drogheda by contrast had a 43% walk in trade, which was nearly on par with those that came by car (47%). From the Navan survey, it is evident that people are travelling further for both their main food and top up shopping. This is important in terms of ensuring that the competitiveness of Navan is sustained as road and other communications improve. It however serves to highlight that there is a need to improve convenience floorspace around the County's centres to help reduce the need for people to travel to meet these needs.

- Navan is the most important destination for large 'bulky' household shopping (36%) with much lesser levels being lost to other centres. However, it should be noted that the survey was undertaken well before the opening of Lakepoint Retail Park at Mullingar, which can be anticipated to have had a considerable effect on shopping patterns. This could be in the form of diverting expenditure that is currently retained in the County or that which is already lost to other centres and specifically Blanchardstown. The quantification of these effects is not possible without new surveys and highlights the need for baseline information to be up dated at regular intervals to ensure that the best information is available.

2.17 In the capacity assessment that follows, the quantitative result of the surveys in terms of the retention and leakage of convenience and comparison expenditure are provided.

3. BROAD ASSESSMENT OF ADDITIONAL FLOORSPACE

3.1 One of the key requirements of the RPG is that retail strategies should provide a broad assessment of the additional retail floorspace required in counties over the lifetime of their strategies. The foundations of the assessment for the County Retail Strategy are laid down by the GDA Strategy. This section reviews and updates the floorspace capacity assessment for Meath that was summarised in the GDA Strategy and also produced in the Meath County Report included as Annex 2 to the GDA Strategy. It is important to highlight that the dual objectives of the exercise are to:

i Update the baseline information at the County level in the light of new published and public information, specifically in respect of population and extant planning permissions; and

ii Relate any amendments/revisions to the baseline information and assessments in the GDA Strategy to assure linkage between the two strategies and hence enable ease of identification of how and why the County Retail Strategy differs from the regional retail strategy.

3.2 The approach adopted recognises that the information collected, collated and analysed in the preparation of the GDA Strategy was current at the point of survey and collation. The 'freeze date' for the GDA Strategy baseline information was May 2001. Whilst it is the best and most comprehensive database, it represents the baseline position at one point in time. It has been noted that this is recognised in the GDA Strategy where a commitment has been made to review, monitor and update the strategy's baseline in Autumn 2003 following the up date of the SPG for the GDA in Spring 2003. In respect of the latter, we understand that this is about to commence.

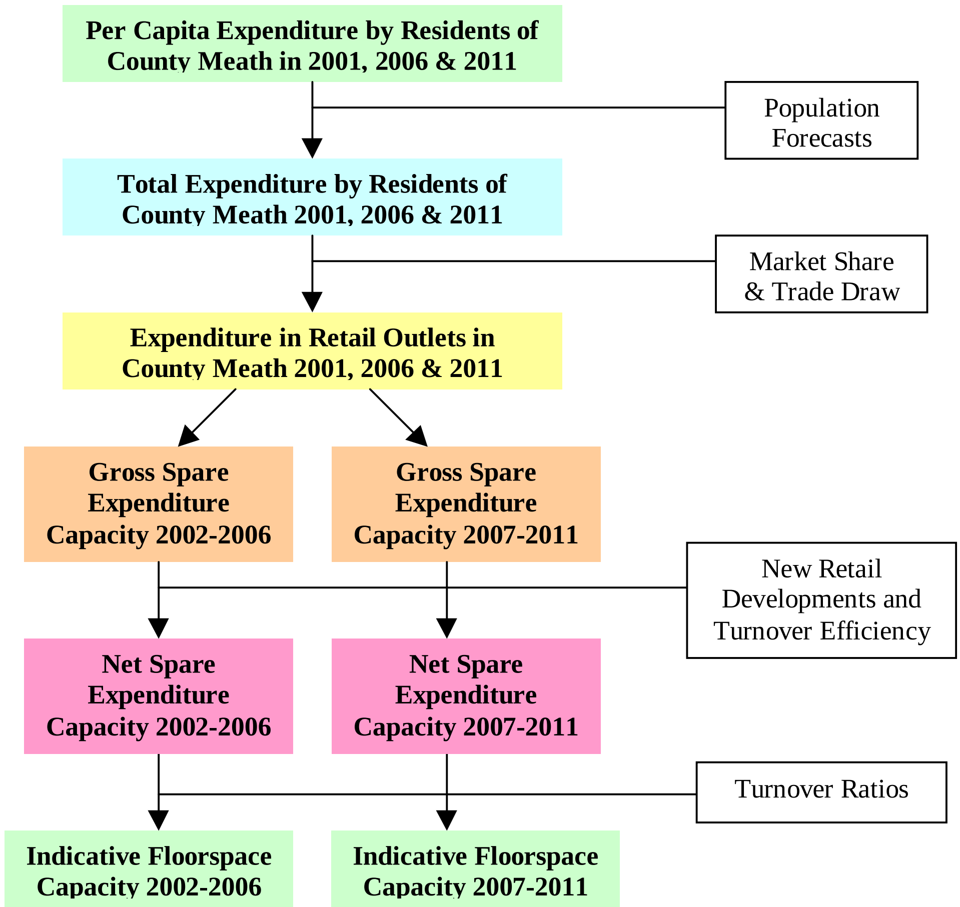
PRINCIPLES & OBJECTIVES

3.3 The capacity assessment is the mechanism used to estimate the amount of additional expenditure that will occur in the County over the period of the GDA Strategy (to 2011) and the type and amount of additional floorspace that will be required in order to accommodate this expenditure. At the same time, allowances must be made for any:

- New retail outlets that are planned to come on-line as identified by extant planning permissions
- Increases in sales in existing stores due to improvements in turnover efficiency
- Expenditure in alternative forms of retailing – this includes e-retailing, mail order sales and market stalls. It excludes wholesale retail and car sales outlets, as laid down by the RPG.

3.4 Figure 3.1 provides an overview of the process used in undertaking the capacity assessment.

Figure 3.1
The Capacity Assessment Methodology



3.5 The key inputs and outputs are derivation of the following:

- **Step 1:** Population and Expenditure Estimates
- **Step 2:** Turnover Estimates
- **Step 3:** Turnover Ratios
- **Step 4:** Gross Additional Expenditure Potential
- **Step 5:** Future Sources of Retail Sales
- **Step 6:** Capacity Potential.

POPULATION AND EXPENDITURE ESTIMATES

3.6 In order to calculate the total amount of retail expenditure on convenience and comparison goods by the resident population of the County to 2011, we multiply the estimated per capita levels of expenditure for the GDA by the forecasts for the population. As has been highlighted in Section 2, the population baseline and forecasts used in the assessment are derived from the 2001 County Housing Strategy which differ from those set out in the SPG and hence the outputs differ from that in the GDA Strategy. It has been acknowledged that the Housing Strategy estimated the 2001 population to be in excess of the SPG figures and that they are also more in line with the preliminary results of the 2002 Census of Population. The review of the SPG forecasts and subsequently that of the GDA Strategy will enable the resolution of the differences. In advance of this it is appropriate that the best and most up to date baseline is used. Given this context, the resulting expenditure estimates are outlined in Table 3.1 below.

Table 3.1
Expenditure by the Resident Population of Meath on Retail Goods sold in Retail Outlets (1999 prices, €m)

Period	Per Capita Expenditure		Population	Total Expenditure	
	Conv (€)	Comp (€)		Conv (€m)	Comp (€m)
2001	2,357	2,392	130,000	306.4	311.0
2006 High	2,609	3,333	161,000	420.1	536.6
2006 Low	2,553	3,077		411.0	495.4
2011 High	2,819	4,482	180,000	507.4	806.8
2011 Low	2,719	3,878		489.4	698.0

3.7 In the analysis of retail expenditure, we are only concerned with expenditure that occurs within retail outlets i.e. expenditure related to retail floorspace solely. As a result, the per capita expenditure figures above have been adjusted to factor out expenditure that does not occur within retail outlets e.g. via the Internet.

TURNOVER ESTIMATES

3.8 The GDA Strategy makes use of the household and shopper surveys in estimating the extent of expenditure on goods in retail outlets in the County by the residents of Meath (**market share**) and by people living outside of Meath (**trade draw**). This enables the estimation of the total amount of turnover by retail outlets located in Meath or, put another way, the total amount of expenditure on goods sold in the County.

3.9 It is estimated that approximately 93% of convenience expenditure by the resident population is spent in retail outlets located in the County. It retains the highest proportion of comparison spend (58%) of any of the GDA counties outside of Dublin City. This is largely due to the importance and strength of Navan and its relative distance from Dublin and the M50 shopping centres compared with other main towns/centres in the GDA.

3.10 Persons living outside the County account for approximately 10% of convenience turnover and 14% of comparison turnover of retail outlets in Meath. No significant change in shopping patterns is anticipated up to 2011 and therefore the market share and trade draw estimates are assumed to remain constant over this period. It is accepted that new retail developments within and outside of the County will have an influence on patterns. However, this approach reflects the baseline position in the GDA and assumes that all counties will be seeking to secure new retail development that at least maintains current patterns. Whilst it is unlikely that this will be the case, it is the starting point for counties such as Kildare, Meath and Wicklow to redress expenditure outflow and capture a greater retention of spend. This is acknowledged in the GDA Strategy.

3.11 To calculate turnover, the first step is to subtract the amount spent by residents in retail outlets located outside the County from the total amount of retail expenditure by residents of Meath. This gives the spend by residents in retail outlets located inside the County. In the case of convenience expenditure, this accounts for 93% of total spend in retail outlets in Meath. This is a high level of expenditure retention. The next step is to add the additional 10% of total expenditure due to persons living outside the County, which gives the total turnover of retail outlets located in Meath. This is the process used in calculating the figures presented in Table 3.2.

Table 3.2 Projected Turnover from Retail Outlets Located in the County (1999 prices, €m)						
Period		**Convenience**			**Comparison**	
		Low	**High**		**Low**	**High**
2001						
Resident Expenditure		306.4			311.0	
Less Expenditure Outflow	*7*	21.4		*42*	130.6	
Spend by Resident on Outlets in County		285.0			180.4	
Add Imported Expenditure	*10*	31.7		*14*	29.4	
Spend in Retail Outlets in Meath		**316.7**			**209.8**	
2006						
Resident Expenditure		411.0	420.1		495.4	536.6
Less Expenditure Outflow	*7*	28.8	29.4	*42*	208.1	225.4
Spend by Resident on Outlets in County		382.2	390.6		287.3	311.2
Add Imported Expenditure	*10*	42.5	43.4	*14*	46.8	50.7
Spend in Retail Outlets in Meath		**424.7**	**434.0**		**334.1**	**361.9**
2011						
Resident Expenditure		489.4	507.4		698.0	806.8
Less Expenditure Outflow	*7*	34.3	35.5	*42*	293.2	338.9
Spend by Resident on Outlets in County		455.1	471.9		404.8	467.9
Add Imported Expenditure	*10*	50.6	52.4	*14*	65.9	76.2
Spend in Retail Outlets in Meath		**505.7**	**524.3**		**470.7**	**544.1**

TURNOVER RATIOS

3.12 Our turnover figures for 2001 set out in Table 3.2 are an estimate of the amount of expenditure that is being sustained by the estimated amount of floorspace in the County. For example, in 2001 Meath had 23,878m^2 of convenience floorspace that was generating turnover of €316.7m and 42,031m^2 of comparison floorspace that was generating €209.8m. Looking at the indicative turnover ratios (turnover divided by floorspace), trading conditions in the convenience sector would be considered to be quite healthy (€13,263 per m^2) and possibly point to some degree of over-trading, while comparison turnover ratios would be close to average (€4,992 per m^2).

GROSS ADDITIONAL EXPENDITURE POTENTIAL

3.13 Estimates of the growth in spare expenditure capacity that will occur in Meath over the period of the Strategy to 2011 are derived from the turnover estimates for 2001, 2006 and 2011. These estimates are provided in Table 3.3.

Table 3.3 **Gross Spare Expenditure Capacity in Meath (1999 prices, €m)**				
Period	**Convenience**		**Comparison**	
	Low	**High**	**Low**	**High**
2002-2006	108.0	117.3	124.3	152.1
2007-2011	81.0	90.3	136.6	182.2

FUTURE SOURCES OF RETAIL SALES

3.14 The spare expenditure figures estimated for Meath up to 2011 are gross estimates and need to be adjusted to take account of expenditure that may occur via new retail developments that are due to come on stream post 2001 and through increases in turnover efficiency (we already accounted for the possibility of growth in Internet retailing).

3.15 In considering **new retail outlets** that are planned for development post 2001, we have regard only to those developments with a net floorspace of 500m^2 for convenience retailing and 1,000m^2 for comparison retailing. This is consistent with the GDA Strategy. The information was provided by Council Officers and is set out in Table 3.4. This new floorspace is anticipated to accommodate €53.9m of convenience and €33.3m of comparison expenditure over the period to 2006. Note should be made that the baseline deadline was set at June 2002. However, account has been taken of information that has come forth since that date to ensure that the baseline is as up to date as possible.

Table 3.4 **Extant Planning Permissions in Meath as at June 2002**					
Extant Permissions	**Gross m^2**	**Net/Gross Ratio**	**Net m^2**	**Turnover €/m^2**	**Turnover €m**
Convenience					
Ashbourne Town Centre	2,787	70%	1,951	12,697	24.8
Navan SC	1,760		1,232		15.6
Bailis Athlumney Navan	1,520		1,064		13.5
Total Convenience	**6,067**		**4,247**		**53.9**
Comparison					
Ashbourne Town Centre	5,600	80%	4,480	5,714	25.6
Main Street Dunshaughlin	1,695		1,356		7.7
Total Comparison	**7,295**		**5,836**		**33.3**

3.16 The assumptions regarding the impact of **turnover efficiency growth** on additional expenditure potential are based on those made in the GDA Strategy. Turnover efficiency growth of 1% per annum is anticipated to accommodate additional comparison expenditure of €10.7m between 2002 and 2006 and €11.2m between 2007 and 2011. An allowance must also be made for turnover efficiency growth that will occur from the new comparison developments detailed in Table 3.4. This is anticipated to accommodate additional comparison expenditure of €1.7m between 2007 and 2011.

CAPACITY POTENTIAL

3.17 The expenditure accounted for by the new retail developments and turnover efficiency growth is subtracted from the estimates of gross additional expenditure potential in Table 3.3. The results are our estimates of net additional expenditure capacity growth, as detailed in Table 3.5 below.

Table 3.5
Net Expenditure Capacity Growth in Meath (1999 prices, €m)

Period	**Convenience**		**Comparison**	
	Low	**High**	**Low**	**High**
2002-2006	54.1	63.4	80.3	108.1
2007-2011	81.0	90.3	123.7	169.3

3.18 The final part of the capacity assessment is to determine the amount of floorspace that is required to accommodate this anticipated increase in expenditure over the period of the Strategy. This is achieved by applying turnover ratios derived in the GDA Strategy to the expenditure figures. For the convenience sector, a turnover ratio of €12,697 is used, while a ratio of €5,714 is used for the comparison sector. Applying these turnover ratios to the net expenditure capacity growth we arrive at estimates of the net floorspace potential available in the County in Table 3.6 below.

Table 3.6
Indicative Net Floorspace Potential in Meath (m^2)

Period	**Convenience**		**Comparison**	
	Low	**High**	**Low**	**High**
2002-2006	4,300	5,000	14,100	18,900
2007-2011	6,400	7,100	21,600	29,600
Total	**10,700**	**12,100**	**35,700**	**48,500**

3.19 The capacity assessment indicates that there is significant potential for both new convenience and comparison floorspace on top of that which already benefits from full planning permission, much of which has already been implemented and is now trading. Excluding the extants/recently developed floorspace, to put the additional potential in context, based on the high scenarios, there is sufficient capacity for the equivalent of 1.5 and 2.7 times the current convenience and comparison floorspace in Navan respectively for the whole County. The present day total convenience and comparison floorspace in Meath is 23,878m^2 and 35,138m^2 respectively – the high scenario indicates there is capacity for this to increase by 12,100m^2 (convenience) and 48,500m^2 (comparison) and clearly illustrates the immense potential for the period to 2011.

4. THE RETAIL HIERARCHY

4.1 The County Retail Hierarchy is a key component of the County Retail Strategy and the future pattern of retailing in the County. This is consistent with the RPG and the GDA Strategy. The foundation of the County Retail Hierarchy is the GDA retail hierarchy. However, as has been identified in Section 1, the RPG require from county retail strategies:

> *'Confirmation of the retail hierarchy, the role of centres and the size of the main town centres'*

4.2 It is important therefore that to meet the RPG requirements the framework for the County Retail Hierarchy should be examined particularly in view of what has been set down in the GDA Strategy in respect of the importance of the retail hierarchy. This has been highlighted in Section 1 and is:

> *'The distribution of new floorspace should be linked to the existing and future retail hierarchy for the GDA, and should be appropriate in scale and character to the hierarchical role of the centre'*

4.3 Our examination of the County Retail Hierarchy comprises review and consideration of the following:

i The GDA retail hierarchy;

ii The County Development Plan Urban Settlement Structure;

iii Le Cheile – the County Development Board's Integrated Strategy for Meath to 2012;

iv Comparison of the GDA and County settlement structure set against other factors and influences;

v The roles and functions of different centres in the hierarchy; and

vi The role and importance of the retail hierarchy.

GDA RETAIL HIERARCHY

4.4 The GDA Strategy sets out the GDA retail hierarchy. The retail hierarchy distinguishes between centres in the Metropolitan Area and the Hinterland Area of the GDA. This is founded on consideration of the following:

- The land use and transportation planning framework set out in the SPG – this is a particularly important determinant of the shape of not only the hierarchy but the GDA Strategy as a whole.

- Existing statutory development plan zonings/settlement structure – these are noted as a fundamental influence on the GDA Strategy.
- Shopping patterns from the household and shopper surveys – these have identified the strength and draw of specific centres.
- The dynamics of the retail sector.

Table 4.1
GDA Retail Hierarchy

	METROPOLITAN AREA	HINTERLAND AREA
LEVEL 1	**Metropolitan Centre**	
	Dublin City Centre	
LEVEL 2	**Major Town Centres**	**County Town Centres**
	Fingal: Swords, Blanchardstown *South Dublin*: Lucan/Clondalkin - Liffey Valley, Tallaght *Dun Laoghaire-Rathdown*: Dundrum, Dun Laoghaire *Wicklow*: Bray *Kildare*: Leixlip, Maynooth or Celbridge	***Meath*: Navan** *Kildare*: Naas/Newbridge/Kilcullen *Wicklow*: Wicklow Town
LEVEL 3	**Town and/or District Centres**	**Sub-County Town Centres**
	Including, but not confined to *Fingal*: Malahide/ Portmarnock *Dublin City:* Finglas, Northside, Artane, Omni, Donaghmede, Kilbarrick, Phibsboro, Ballyfermot, Ballymun Crumlin, Sundrive, Rathmines Merrion, Ayrfield, Docklands *South Dublin*: Balgaddy, Clondalkin, Lucan, Kilnamanagh, Rathfarnham *Dun Laoghaire-Rathdown*: Nutgrove, Stillorgan, Blackrock, Dalkey, Cornelscourt, Cherrywood *Wicklow*: Greystones *Kildare*: Leixlip, Maynooth or Celbridge (subject to choice of Major Town Centre), Kilcock	*Fingal*: Balbriggan *Kildare*: Athy, Kildare/ Monasterevin ***Meath*: Ashbourne, Kells** and **Trim** *Wicklow*: Arklow
LEVEL 4	**Neighbourhood Centres**	**Local Centres – Small Towns and Villages**
	Examples include: *Dublin City*: Prussia St., Sandymount, Fairview, Clontarf etc. *Fingal*: Castleknock, Corduff Roselawn SC *Dun Laoghaire-Rathdown*: Ballinteer SC, Sandyford SC *South Dublin*: Fortunestown, Killinarden, Deansrath, Bawnogues, Neilstown, Knocklyon	Examples include: *Wicklow*: Rathnew, Newtownmountkennedy Blessington, Baltinglass, Carnew, Rathdrum, Ashford, Aughrim, Avoca, Dunlavin, Kilcoole, Roundwood, Shillelagh Tinahely, *Kildare*: Johnstown, Prosperous, Kill, Ballymore Eustace, Rathangan, Castledermot, Clane, Sallins, *Fingal*: Skerries, Lusk/Rush, Donabate, Portrane, Balrothery, ***Meath*: Athboy, Ballivor, Clonee, Duleek, Dunboyne, Dunshaughlin, Enfield, Nobber, Oldcastle, Ratoath, Slane, Summerhill**

Table 4.1 (Continued) GDA Retail Hierarchy		
LEVEL 5	Corner Shops	smaller villages/ crossroads - rural shops (post offices, creameries, public houses, petrol filling stations etc.)
[1] The identification of Town and/or District Centres as indicated reflects the different functions and potential of centres within this level of the hierarchy. The designation of Town and/or District Centres is a matter for individual Planning Authorities to determine in their retail strategies and development plan variations. With the consolidation and expansion of the Metropolitan Area, the potential exists for further district level retail facilities to be developed in association with planned residential areas. Also existing Neighbourhood Centres may be extended/upgraded to become District Centres where need/potential arises. Existing standalone villages/settlements such as Rathcoole, Newcastle, Saggart etc. may also in the longer term be absorbed by the Metropolitan Area and become locations for District Centres.		

4.5 Table 4.1 sets out the GDA retail hierarchy. It identifies the different main centres in Meath and highlights where they sit in the hierarchy. In respect of Meath, it is important to highlight that it does not include centres outside of the Dublin and Mid East Regions where environs of centres are within the GDA. This specifically refers to Drogheda which is designated as a Level 1 Tier 3 centre in the national retail hierarchy which is above that of Navan and the level just below the country's Tier 2 provincial cities. Whilst Drogheda has not been designated as a gateway or hub under the NSS, it is a key strategic centre and expanding centre within the north east. This importance and potential requires to be recognised within the Meath County Retail Strategy given that substantial expansion of the town's environs is likely to take place within the County's boundaries. Within the GDA, a similar position prevails with Kilcock where the town centre is within a neighbouring county but substantial residential expansion has or will take place within the administrative boundaries of Meath. This also requires to be taken due account of within the County Retail Strategy.

COUNTY DEVELOPMENT PLAN URBAN SETTLEMENT STRUCTURE

4.6 The County Development Plan sets down the strategic framework for growth in Meath. It is important to highlight that the Development Plan was the subject of a judicial review in respect of its compliance with the SPG for the GDA. The judgement of the review was published on 2 September 2002. The importance of the conclusions of the review are that whilst the Plan was not found to be in full compliance with the SPG, the County Council did have '*due regard'* to the guidelines and therefore the legality of the Plan and the thrust of its policies are endorsed.

4.7 A key issue underpinning the differences between the SPG and the Plan is that the SPG set out in the 'Strategy for the Hinterland Area' within which Meath sits:

> *'…the objective of achieving over a period of time, a number of towns (or adjacent sets of towns), each complete with a high level of employment activities, higher order shopping and the full range of facilities. Ideally such towns should be self sufficient with little or no commuting to the Metropolitan Area (of the GDA). However, it is recognised that this is an unachievable target in the timescale covered by the Guidelines. Nevertheless the longer*

term objective should be to achieve self sufficient towns, and in the meantime to establish the conditions in these towns to allow for that. It is, therefore, proposed that future development in the Hinterland Area be strongly directed into the 'development centres' comprising of:

- *Primary centres that is Drogheda, Navan, Balbriggan, Naas-Newbridge-Kilcullen and Wicklow. Apart from Navan each of these is on an existing transportation corridor.*
- *Secondary centres at Athy, Arklow and Kildare-Monastrevin, all on existing or potential transportation corridors…it would be necessary to accommodate local growth in those parts of the Hinterland Area outside of the proposed 'development centres.*

However development outside of the designated centres should be strictly limited to meeting local need.'

4.8 Whilst Navan remains the Primary Development Centre, the Plan also defines 'Core Development Objectives' that identify other centres and areas where new development should be located. This is where it was considered to be at variance to the SPG. The Plan however responded to the development pressures facing the County and to assure that local need was met. These development pressures are evidenced in the significant increase in the County's population since 1996 and the County Development Plan provides the framework for this to be achieved in a sustainable manner at appropriate locations in the County. The Council's objectives and 'Core Development Objectives' were recognised as sound in the conclusions of the judicial review which stated:

> *'Taken as a whole the plan comprises a coherent statement of the planning objectives and strategies envisaged for Meath in the six years to 2007 and the methods of implementation which will be adopted to achieve them.'*

4.9 The strategic approach adopted by the Council in the County Development Plan has an important influence on the shape of the County Retail Strategy in view of the framework that it provides for future growth and development. The Plan identifies three prime development corridors in the County:

i The Navan-Trim-Kells Corridor is focused on the core of the County. The objective of the corridor is to balance expanding residential and employment areas at an appropriate scale to each centre within the triangle. The growth of the corridor will be complemented by enhanced links between each of the centres and to the Metropolitan Area. It is an objective of this corridor to develop Navan as a regional shopping node;

ii The East Meath Corridor focuses on the N1/M1 and part of the emerging Dublin-Belfast economic corridor. This corridor benefits from existing transport infrastructure and will prosper from enhanced transport linkages to Dublin and Belfast; and

iii The South Meath Fringe Corridor includes Ashbourne, Ratoath, Dunshaughlin, Dunboyne/Clonee, Enfield and potentially Kilcock (Environs).

It is an objective of this corridor to consider the land use needs of town centre areas and uses in consideration of development proposals in these centres. An additional objective of the corridor is to enhance connectivity between the different centres along the corridor.

4.10 The County Urban Settlement Structure outlines a settlement structure/hierarchy for the County together with population targets over the period of the Plan. These have been distributed across five electoral areas and urban development roles have been assigned out for each of the centres. In addition, Bettystown/Laytown has been identified in the subsequent East Meath Development Plan (2000) as *'the main commercial and retail areas within the Plan* Area'. In consultation with Officers, the importance of this cluster has been specifically highlighted and as such it has been agreed that Bettystown/Laytown should be designated as a Major Service Centre within the County Urban Settlement Structure. Noting this, the settlement structure for the County is summarised in Table 4.2 below.

Table 4.2
Hierarchy of Urban Development Roles

Designation	Objective	Centre
County Growth Centre	To perform the role promoted for it in the SPG as it develops into a small city.	Navan
Major Urban Centres	Where a wide range of commercial, industrial and commercial functions would be delivered with a significant residential increase/role.	Ashbourne, Drogheda Environs, Kells and Trim
Major Service Centres	Will act as sub regional centres with primarily a residential role but with also a strong commercial and industrial presence.	Athboy Ballivor, Bettystown/Laytown, Clonee, Duleek, Dunboyne, Dunshaughlin, Enfield, Nobber, Oldcastle, Slane and Summerhill
Local Centres	Are intended to act as nodes for distinctive quality driven residential development and essential local commercial and community services.	Baile Gibb, Bellewstown, Carlanstown, Clonard, Crossakiel, Donore, Drumconrarth, Kentstown, Kildalkey, Kilmwood, Kilmessan, Longwood, Moynalty, Rathcairn, Rathmoloyn and Ratoath.

LE CHEILE – AN INTEGRATED STRATEGY FOR MEATH TO 2012

4.11 The County Development Board Integrated Strategy was published in January 2002. The framework for the strategy is guided by its Mission Statement and objectives derived from a number of recent national level studies. The Mission Statement is:

'To promote the sustainable development of County Meath through an integrated and socially inclusive approach that recognises the economic, social and cultural potential of the population, and the limits and opportunities provided by the county's environmental and other resources.'

4.12 The framework to achieve the strategy's objectives comprises the four following components:

i *'**A spatial framework** for development in Meath, that takes account of the County Development Plan, the GDA Strategic Planning Guidelines, the investments under the National Development Plan and the emerging proposals for the National Spatial Strategy;*

ii ***Four sectoral strategies** to address issues related to social and economic infrastructure; the productive sectors; social and cultural facilities and services, and education and human resources;*

iii ***Mechanisms to ensure that cross-cutting themes are adequately addressed.** The themes include social inclusion; balanced sustainable urban and rural development; equality; enhancement of the quality of life; improved capacity to adapt to on-going changes, community development and enhanced citizen participation;*

iv ***CDB actions to assist implementation of the strategy.** These include actions to secure additional resources, preparation of responses to opportunities and threats, dissemination of information on policies and strategies at EU and national level, collation and analysis of data. This section also includes proposals to ensure co-ordination of the Meath strategy with those prepared by other CDBs in the Greater Dublin Area, and also with the strategies for other counties that are contiguous to Meath.'*

4.13 The strategy is holistic in its objectives and outputs. It embraces the Urban Settlement Structure that is defined in the County Development Plan and summarised above. Particular emphasis is given to the importance of the Navan-Trim-Kells Corridor although that of the other two corridors (East Meath and South Meath Fringe) is also well recognised. In respect of the Navan-Trim-Kells Corridor, the strategy states as Objective 3.3.2.1:

> *'Coordinated provision of infrastructure (economic and social/cultural) to enable the Navan-Trim-Kells (NTK) corridor to become the primary development area for the county with Navan as its centre'*

4.14 Under this objective, the strategy identifies the development of Navan as a regional shopping centre as an action for the short to medium term. Around the remainder of the County, the strategy does not identify any specific actions for any other centre in respect of its retailing role over the period to 2012. It does however identify the need to upgrade basic town/village infrastructure, appearance and maintenance and this has been taken due account of in the preparation of the County Retail Strategy and the definition of the County Retail Hierarchy.

COMPARISON OF THE GDA AND THE COUNTY URBAN SETTLEMENT STRUCTURE

4.15 Both the County Development Plan and the County Development Board's Integrated Strategy adopt the Urban Settlement Structure as the framework for the County's towns and villages to develop. It is important to recognise that a settlement structure has wider objectives and a different purpose than a retail hierarchy. It is however an important influence in the determination of a retail hierarchy and was in fact a key foundation for where the County's centres were placed in the GDA hierarchy. There are relatively minor differences between the GDA hierarchy and the County Urban Settlement Structure. However, it is important to highlight what these are to provide the clarity required in translating the former at a County level.

4.16 The hierarchy set out in the GDA Strategy is not only based on the current level of population and existing retail provision but also on the potential for future population and retail growth. The key differences to note are that the GDA hierarchy has five levels while the Urban Settlement Structure has four different settlement levels. These differences can be seen when Tables 4.1 and 4.2 are compared. It can be seen that the GDA hierarchy has five levels with Dublin City Centre being the only centre in Level 1. Apart from this, the key difference is the nomenclature used e.g. County Town Centre as opposed to County Growth Centre in respect of Navan plus the County Urban Settlement Structure lists the Local Centres whereas the GDA hierarchy notes what they comprise but does not list centres. In addition, during the preparation of the Strategy, the other following differences with the GDA hierarchy have emerged and should be noted:

- As has been highlighted above, the East Meath Development Plan 2000 identifies Bettystown and Laytown as centres to which retail and commercial growth should be directed within the East Meath Corridor. This is not reflected in the GDA hierarchy. Following a review of these centres' population and role, it was agreed that both centres would be included as Level 4 – Local Centres.
- Ratoath is categorised as a Local Centre in the County Urban Settlement Strategy which would be Level 5 in the GDA Strategy whereas the strategy places Ratoath as a Level 4 Local Centre in the GDA hierarchy. It is agreed that the latter is appropriate in respect of Ratoath's place in the County Retail Hierarchy.
- Nobber and Summerhill are categorised in the County Urban Settlement Structure as Level 3 Major Service Centres and as a consequence were incorporated as Level 4 Local Centres in the GDA hierarchy. They were not however identified as key centres to be incorporated in the health checks. Following review of the initial Draft Strategy, Council Officers requested that Nobber be included in the retail settlement hierarchy as Tier 2 Level 4. Summerhill is designated as Level 5 Small Villages in the GDA and County Retail Hierarchies.

- Following review of the initial Draft Strategy, Council Officers also requested that the environs of both Drogheda and Kilcock be incorporated in the assessment of retail potential.

4.17 The four levels of the County Urban Settlement Structure are equivalent to Levels 2 to Level 5 centres in the GDA hierarchy. All of Meath's centres are within the Hinterland Area of the GDA. The GDA hierarchy does not distinguish between different types of centre in Levels 4 or 5, as this is the role of the Local Planning Authority. We examine the centres and their level in the GDA hierarchy in the paragraphs below to put the designations into the County context.

Level 2 Centres

4.18 **Navan** is classified as a **Level 2 County Town Centre** in the GDA hierarchy and is the **County Growth Centre** in the County Urban Settlement Structure. It is the only Level 2 centre in the County. As has been noted, the only Level 1 centre in the GDA hierarchy is Dublin City Centre. In terms of the GDA hierarchy, in the Hinterland Area, Navan ranks alongside Naas/Newbridge/Kilcullen and Wicklow Town which indicates its importance in the GDA as a County Town Centre. The GDA and County designations recognise that Navan and its environs have the largest population and floorspace in the County. The settlement has over 47% of the County's total trading floorspace. Navan is predominately a comparison centre with some 58% of its total trading floorspace being devoted to comparison goods. This is consistent with it being designated as one of the higher order centres in the GDA as it offers a good choice and range of higher order goods. Navan has in fact just over 51.3% of the County's total comparison floorspace and therefore this marks it out above the other centres in the County. Extant permissions slightly reduce this as they are for convenience floorspace but they do not change the County Town's dominance of the comparison retail sector in Meath.

4.19 Part of the environs of one of the two main centres in neighbouring Louth – Drogheda – are within Meath's county boundary. Drogheda in fact ranks above Navan as a Level 1 Tier 3 centre in the national retail hierarchy. The importance and influence of Drogheda on the shopping patterns of the north of the GDA was recognised in the preparation of the GDA Strategy. It is an expanding large centre and will witness considerable residential development/expansion in the Drogheda environs over the period of the County Retail Strategy and beyond. This expanding population will require to be served by retail floorspace and other local services. The national designation reflects Drogheda as a whole but specifically the town centre. The environs as such, as is common around the country, are not specifically recognised within retail hierarchies. However, given the importance of the Drogheda environs, they are noted within the County Retail Hierarchy under the Level 3 designated centres.

Level 3 Centres

4.20 **Ashbourne**, **Kells** and **Trim** are all **Level 3 Sub-County Town Centres** in the GDA hierarchy and **Major Urban Centres** in the County Urban Settlement Structure. They are recognised as centres of comparable importance to Balbriggan, Athy, Kildare/Monasterevin and Arklow in the GDA hierarchy. In addition, it is important to recognise that, in neighbouring Kildare, Kilcock is also a centre at this level within the GDA hierarchy and the anticipated expansion of this centre and its environs have implications for those parts of the County and the requirement for additional retail floorspace. As with Drogheda above, Kilcock environs are thus noted under the Level 3 designated centres in the County Retail Hierarchy.

4.21 **Ashbourne** has the largest population after Navan in the County but at the time of the 2000 floorspace surveys had the lowest total trading retail floorspace of the three Level 3 centres. With the implementation of the extant permissions, as has been highlighted in Section 2, Ashbourne has become the second largest retail centre in Meath. The new retail floorspace has changed the balance of retailing in the town from 68% of floorspace being convenience at the time of the GDA floorspace surveys to now over 57% of floorspace being comparison. **Kells,** together with its environs, was the fourth largest centre in 1996 in the County. It had the third largest total trading retail floorspace at the time of the GDA surveys, with 65% comparison and the 35% convenience. **Trim**, together with its environs, had the third largest population in the County in 1996. This population is envisaged to further increase reflected through additional residential zoning in the Trim Development Plan 2002. At the time of the GDA floorspace survey, Trim had considerably more retail floorspace than either Kells or Ashbourne but as noted this has changed in respect of the latter. Convenience floorspace accounts for 38% of its trading floorspace while comparison accounts for 62%.

Level 4 Centres

4.22 The **Major Service Centre** designation in the County Urban Settlement Structure is equivalent to **Level 4 Local Centre - Small Towns & Villages** in the GDA hierarchy. Review of the characteristics of the Level 4 centres shows that they do not all function at the same level whether that be by comparison of population levels or that of floorspace quantum and composition. Given the importance of setting a hierarchy that reflects the role and importance of centres then designation of all the above centres as equal centres in the hierarchy does not achieve this. Whilst it would be inconsistent with the GDA hierarchy to re-designate centres in different levels of the hierarchy, it would be consistent with the RPG to introduce a two tier approach to Level 4. The GDA hierarchy provides the scope for a tiered approach by not differentiating between Small Towns and Villages and leaves differentiation to individual Planning Authorities within their retail strategies and development plan variations.

4.23 Taking account of population (existing and future), floorspace quantum and composition and geographical location, **Tier 1 Level 4 Small Town Centres** emerge as:

- Athboy;
- Bettystown;
- Duleek;
- Dunboyne;
- Dunshaughlin;
- Oldcastle; and;
- Ratoath.

4.24 The remaining centres would fall into the category of **Tier 2 Level 4 Village Centres**. These are:

- Ballivor
- Clonee
- Enfield
- Laytown
- Nobber
- Slane.

Level 5 Centres

4.25 The **Local Centre** designation in the County Urban Settlement Structure is the equivalent of **Level 5** in the GDA hierarchy. Although these centres are identified in the Urban Settlement Structure they are not in the GDA hierarchy, even by example as was the approach adopted for Level 4 centres. The centres are Baile Gibb, Bellewstown, Carlanstown, Clonard, Crossakiel, Donore, Drumconrath, Kentstown, Kilmessan, Longwood, Moynalty, Rathcairn, Rathmoloyn and Summerhill. On the whole, these have very limited levels of retail and services floorspace/representation although some, such as Slane, perform other important roles in the County Urban Settlement Structure/Retail Hierarchy. In the case of Slane, it is its tourism role and national profile as an event destination.

ROLES & FUNCTIONS

4.26 The above analysis of the County Retail Hierarchy introduces that centres at different levels in the hierarchy have different roles and functions. These are summarised in the GDA Strategy. In the paragraphs that follow, these different roles and functions of centres at different levels in the GDA Hierarchy are set out.

Level 2 – Major Town Centres and County Town Centres

4.27 The Level 2 centres are the most important centres beyond Dublin City Centre. The GDA Strategy states:

> *'They will tend to serve catchment areas well beyond their immediate locality, they should have potential for significant comparison floorspace and some already have, including higher order shopping and offer a wide range of non-retail services.'*

4.28 Navan is the primary growth centre for Meath as stated in the SPG and is designated as **Level 2 County Town Centre** in the GDA hierarchy. This is equivalent to a Major Town Centre in the Metropolitan Area which highlights the importance of Navan in the GDA hierarchy. The Major Town Centres are Blanchardstown, Liffey Valley, Dundrum, Dun Laoghaire, Bray and the group of Leixlip, Maynooth or Cellbridge. The Level 2 designation of Navan reflects the quantum and quality of retail floorspace offered in the town together with other services provided such as office space, cinemas/other commercial leisure, cultural and business services. This is consistent with the objectives of the 2001 Meath County Development Plan. Navan at present is by far the strongest of the County Town Centres in the GDA hierarchy and given the market interest in new floorspace this is set to continue.

Level 3 – Town and/or District Centres & Sub-County Towns

4.29 At Level 3 in the GDA Hierarchy, Ashbourne, Kells and Trim are designated as **Sub-County Town Centres** in the Hinterland Area of the GDA. The GDA Strategy states that Sub County Town Centres perform a similar role to **Town and/or District Centres** in the GDA Metropolitan Area which is that:

> *'**Town** and/or **District Centres** are widely distributed throughout the Metropolitan Area. They are smaller than the Major Town Centres and will usually be anchored by convenience shopping, offer lower order comparison retailing and have a more limited service role. Typically they will serve catchments within a 10 to 15 minutes drive time of the centre, the size of catchment being determined by the density of the population. Density characteristics will therefore influence the size of centre.'*

and

*'The **Sub County Centres** perform an equivalent role in the Hinterland Area.'*

4.30 In respect of Ashbourne, Kells and Trim, the designation reflects the range, quality and quantum of retail floorspace plus the diversity of town centre uses offered. Kells and Trim have been identified because they perform a wide range of commercial, industrial and community functions in the north and south of the County respectively. Both towns are also major visitor destinations. Ashbourne has been identified due to its strategic location on the N2, within close proximity of the Metropolitan Area. As has been highlighted, the environs of both Drogheda and Kilcock are noted within this level of the County Retail Hierarchy as both could require district centre level of provision to meet the retail and local service needs of their expanding populations.

Level 4 – Neighbourhood Centres and Local Centres

4.31 Level 4 centres in Hinterland Area are termed **Local Centres – Small Towns and Villages** in the GDA hierarchy. The GDA Strategy defines that these centres perform similar roles to the Neighbourhood Centres as follows:

> *'**Neighbourhood Centres** will be strongly represented throughout the Metropolitan Area, typically comprising a parade of convenience stores, the occasional lower order comparison outlet and limited local services. They will primarily serve a walk-in population and will have limited parking.'*

and

> *'**Small Towns** and **Village Centres** perform an equivalent role within the Hinterland Area.'*

4.32 As we have highlighted, the GDA Hierarchy provided examples of centres around the different counties that would come under these designations. It was not intended that only centres listed in the GDA retail hierarchy should have this designation. As has been noted, following the review with Council Officers, it was agreed that Bettystown/Laytown warranted inclusion as centres at this level in the hierarchy.

4.33 The review of the County Retail Hierarchy differentiates between what centres function as Small Towns and those that are more appropriately designated as Village Centres. Given the rural nature of the County and the spatial distribution of centres and population, then there is reliance on the private car hence Small Towns and Village Centres serve more than a walk-in population. The Small Towns have a more important role therefore in meeting shopping needs than the Metropolitan Area's Neighbourhood Centres, particularly in respect of convenience shopping. This has to be recognised in the County Retail Strategy in terms of the key centres at this level of the hierarchy – Athboy, Bettystown, Duleek, Dunboyne, Dunshaughlin Oldcastle and Ratoath – fulfilling their role and function in the retail hierarchy and the need to develop these centres as Small Town Centres which is consistent with the County Urban Settlement Structure. The tier below at this level of the hierarchy are the centres that, whilst still important in their catchment areas, perform a more restricted role than the Small Town Centres in the County's Retail Hierarchy. These are the Tier 2 Local Centres and Village Centres of Ballivor, Clonee, Enfield, Laytown, Nobber and Slane.

Level 5 – Corner Shops and Smaller Villages/Crossroads – Rural Shops

4.34 The final level in the hierarchy, Level 5 embraces **Smaller Villages/Crossroads – Rural Shops**. It is suggested that the centres identified are categorised as examples to ensure that other centres of this level in the County are not excluded. The Smaller Villages that are included in this level of the hierarchy are Baile Gibb, Bellewstown, Carlanstown, Clonard, Crossakiel, Donore, Drumconrath, Kentstown, Kilmessan, Longwood, Moynalty, Rathcairn, Rathmoloyn and Summerhill.

ROLE & IMPORTANCE OF THE RETAIL HIERARCHY

4.35 As with the GDA Strategy, the County Retail Strategy requires to deal with retail issues of a strategic nature. The hierarchy set out above is clear and provides the guidance necessary for the distribution of new floorspace. As such in terms of distribution of major new retail floorspace, its primary focus is on the County Town Centre – Navan – and the Sub-County Town Centres - Ashbourne, Kells and Trim, noting the importance of the Drogheda and Kilcock environs within this level of the County's settlement development/importance. Importantly, the GDA Strategy states that the distribution of new floorspace across the retail hierarchy should be appropriate in scale and character to the hierarchical role of the centre. Table 4.3, from the GDA Strategy (Table 5.3), provides guidance on the type of shopping that is appropriate to different levels of the hierarchy. As with the GDA Strategy, this is not intended to be prescriptive and our emphasis is on the word ***guidance***.

Table 4.3
GDA Hierarchy – Appropriate Shopping Provision

	High Order Comparison	Middle Order Comparison	Low Order Comparison	Superstore	Supermarket
Metropolitan Centre	✔	✔	✔	✔	✔
Major Town Centre (M)	✔	✔	✔	✔	✔
County Town Centre (H)		✔	✔	✔	✔
District/Sub-County Town Centre (M/H)			✔	✔	✔
Neighbourhood Centre/Local Retail Centres (M/H)					✔

M = Metropolitan Area; H = Hinterland Area

5. RETAIL DEVELOPMENT POTENTIAL

5.1 The previous sections of the report have set out the policy and quantitative foundations for the Strategy. This section reviews and addresses the influencing factors at a settlement level to determine the potential of the main centres in the County to accommodate additional retail floorspace over the lifespan of both the County Development Plan and the Strategy. The factors that are considered are:

i Issues and opportunities;

ii Definition of the core retail areas within the main centres; and

iii The sequential approach.

ISSUES AND OPPORTUNITIES

5.2 The assessment of the issues and opportunities has been informed by:

- The health checks provided in the Technical Appendix.
- Site and core retail area appraisals undertaken by the study team.
- Consultations and meetings with Council Officers.
- Submissions received in response to the invitation for submissions on the Strategy published in local newspapers.

5.3 At the outset of the preparation of the Strategy, Council Officers identified sixteen key centres in the County where health checks should be undertaken. These centres to differing degrees were where the additional new floorspace within the County should be distributed over the timescale of the County Retail Strategy, taking due account of the GDA and County Retail Hierarchies. In addition to the health checks, each of these centres were reviewed in respect of their Development Plan policies and objectives and land use zonings, the preliminary results of the 2002 Census of Population where it has been possible and consultations were held with local agents in respect of retail potential and market interest. These surveys, reviews and consultations provided the foundation for the assessment of retail potential at a settlement level.

5.4 Following review of the initial Draft Strategy, Council Officers requested that Nobber and the environs of both Drogheda and Kilcock be incorporated in the assessment of retail potential. Nobber is included to reflect that it is identified as a Level 4 centre in the GDA hierarchy and a Major Service Centre in the County Development Plan Urban Settlement and the environs of Drogheda and Kilcock in view of the immense residential expansion that is occurring in the parts of the environs that are within Meath's county boundaries. It should be however be acknowledged that none of these settlements have had health checks or site visits undertaken and the review of potential is founded on published plans and reports and consultations with Officers.

5.5 The assessment of the retail potential of the main centres in the County is provided in the paragraphs below in the following alphabetical sequence:

i Ashbourne;

ii Athboy;

iii Ballivor;

iv Bettystown;

v Clonee;

vi Drogheda Environs;

vii Duleek;

viii Dunboyne

ix Dunshaughlin;

x Enfield;

xi Kells;

xii Kilcock Environs;

xiii Laytown;

xiv Navan;

xv Nobber;

xvi Oldcastle;

xvii Ratoath;

xviii Slane; and

xix Trim.

Ashbourne

5.6 Ashbourne, with Kells and Trim, is classified as a Level 3 Sub-County Town Centre in the GDA retail hierarchy. Its attributes and potential confirm this designation within the County Retail Hierarchy. Ashbourne however has very different characteristics to both Kells and Trim and this requires to be recognised within the policy framework set by the County Retail Strategy. Its importance, and the strategic role it plays as the main centre in the South Meath Fringe Corridor, is recognised at the County level through its designation as a Major Urban Centre in the County Urban Settlement Structure. As such, Ashbourne assumes an important role in the development of the Dunshaughlin Development Area. The town had a population of 5,000 in 1996 and is planned to increase to 15,000 persons by 2011. From the preliminary results of the 2002 Census of Population, Ashbourne's population is estimated to have increased by nearly 16% to some 7,277 based on the equivalent DEDs and thus it is well on the way to achieving its population target which has implications for the Retail Strategy.

5.7 At the time of the GDA Strategy baseline floorspace surveys, whilst Ashbourne was the second largest settlement in population terms in Meath, it was the fifth largest retail centre in the County. However, there has been major market interest in the town in recent years, which is being evidenced by development on the ground. The current extant planning permissions will increase the town's retail floorspace from 3,056m^2 to 9,487m^2 through the development of a new shopping centre – Ashbourne Town Centre. This development will greatly improve the quantum, quality and range of the town's retail offer and attraction and it will as a result become the second largest retail centre in the County. It will reduce the need to travel for a greater range of retail goods and therefore help reduce leakage of spend from the south of the County. Importantly, in terms of enhancing the diversity of the town centre, the development incorporates a supermarket, cinema/bowling alley, guesthouse, offices, small retail units and apartments. We understand that there remains a healthy interest in further new retail floorspace and given that the town's population is rapidly expanding then the most appropriate locations for development require to be identified.

5.8 The County Development Plan includes land use zoning objectives to expand the town centre between the rear of the properties on Fredrick Street, along its western side, and the Broadmeadow River. The proposed distributor roads in the County Development Plan will open up additional land for commercial and residential development within areas zoned in the Plan. The potential locations are reviewed below:

- **Ashbourne Town Centre:** there is further capacity to expand the retail and other town centre floorspace at the shopping centre. This would further consolidate retailing within the town centre. This potential is however likely to be constrained due to the alignment of road proposals in the County

Development Plan. It is important that the merits and potential of expansion of the shopping centre and the proposed road alignments are reviewed. Expansion of the shopping centre could take place before 2006 although it is likely that this will await the centre fully establishing itself prior to further development coming forward.

- **Dardis & Dunn Site:** the former grain merchants, is located opposite the Ashbourne Shopping Centre and adjacent to the Ashbourne Town Centre development. Its zoning is for major town centre activities and there are proposals for a mixed use development including a large convenience store, apartments and offices complex. The site is well located for the further expansion and consolidation of the town centre. It is a large and deteriorating complex of buildings that detract from the vitality of the town centre. As with any proposals for further development along the main street, traffic and congestion is likely to be an issue but these would be relieved by the road proposals for the bypass and distributor roads. This is a site, where provided that there are no landownership issues/barriers and traffic matters can be resolved, could be developed or at least be underway in the period to 2006.

5.9 In addition to the town centre, the Council has adopted the Killegland Action Plan. The thrust of the Plan is that the needs of the area will be primarily met by provision in Ashbourne Town Centre. This retail needs, particularly convenience, of this and other expanding residential areas require to be fully considered in the Strategy.

5.10 The town's location on the N2 results in large volumes of traffic passing through the centre. As a consequence, it is congested at regular intervals throughout the day. This will be alleviated with the proposed distributor roads around the town and the construction of the Ashbourne Town Bypass as part of the N2 realignment. The Plan indicates that the bypass will be completed by 2005.

5.11 Ashbourne's proximity to the Metropolitan Area centres has meant that local people have looked to these centres rather than others in the County to meet their retail needs. Its location on the N2 has meant easy access to Dublin City Centre and the major shopping centres around the M50 for higher and middle order comparison shopping. Closer to home is the expanding centre of Swords which has witnessed major expansion and improvement of its retail offer across all categories of floorspace. This is set to continue as Swords grows and expands its town centre. This is an objective of the Fingal County Retail Strategy reflecting Swords' importance as a Level 2 Major Town Centre in the GDA retail hierarchy. Whilst the higher order Major Town Centre, plus the City Centre and centres around the M50, attract expenditure from the town and its catchment, recent developments and proposals in the pipeline illustrate the strengths and attributes of Ashbourne as an important centre not only within the County but in the GDA retail hierarchy. The emerging proposals should be welcomed in terms of the contribution that they would make to the enhancement of the town's retail offer and profile. Ashbourne is an expanding town that is absorbing the residential pressures of the Metropolitan Area. For it to sustain it's attractiveness as a retail centre then a long term view must be taken to ensure it functions as more than a commuter town.

5.12 In addition to the convenience and comparison floorspace proposals, it should also be identified as a potential additional location to Navan in the County for retail warehousing in order that the needs of this area of Meath are met and local people do not need to travel to other centres and locations for this type of shopping. This is a variation to the guidance provided in the GDA Strategy which recommends that *'any future retail warehousing should be concentrated in Navan where there is potential for retail park development in the longer term.'* It reflects the outcome of the more detailed analysis that has been possible at the County level in the preparation of the County Retail Strategy and is consistent with the role of the GDA Strategy which states in Paragraph 2 of its Executive Summary:

> *'The Strategy will not however be an end in itself. Its primary purpose is to inform the statutory planning process and in particular, to ensure that future Development Plans make adequate provision for retail development. To assist this, the Strategy is required to provide indicative advice on the scope for new development and how the associated floorspace might be distributed.'*

Athboy

5.13 Athboy is located in the western part of the County, some 19 kilometres from Navan, within the Kells Development Area. It is designated as a Major Service Centre in the County Urban Settlement Structure and lies within the Navan-Kells-Trim Corridor. The town had a population of 1,172 in 1996 and has the potential to increase to 3,000 by 2011. Based on the preliminary results of the 2002 Census, which indicate that Athboy has a current population of 1,857, the town is on course to achieve this potential. Within the GDA hierarchy, Athboy is designated as a Level 4 Local Centre and the review of the County Retail Hierarchy identifies it as a Tier 1 Level 4 Small Town Centre.

5.14 It is an attractive, vibrant centre with a number of independent retail outlets along both sides of the wide Main Street. Comparison floorspace accounts for 59% of the total floorspace in the town and is dominated by a few operators. This compact centre supports a number of quality women's and men's fashion outlets, with the former including bridal wear. Three small symbol group convenience stores are located along Main Street. These stores primarily serve the daily needs of the local people. The County Development Plan identifies a strip of land to the rear of properties fronting onto the northern side of Main Street for town centre uses. Development of the area will require the construction of a distributor road, which will open these lands and may in the longer term lead to the creation of an additional street parallel to Main Street. Realisation of this is highly dependent on development interest and land assembly. It is unlikely that, given the size of the town and its projected population growth, Athboy could sustain any significant level of new retail floorspace. Its relative proximity to Navan erodes its potential further. There are no extant planning consents, proposals in the pipeline or active market interest. It is important that convenience shopping continues to be concentrated within the heart of the centre. The retail potential of the town lies in its important quality fashion offer. Further expansion and promotion of this should be encouraged in parallel to ensuring that the supporting visitor (tourism) infrastructure (bars/restaurants/hotels) and environment sustain the quality and attraction of the town.

Ballivor

5.15 Ballivor is located close to the County boundary with Westmeath, 13 kilometres from Trim and some 20 plus kilometres from Mullingar. It had a population of 343 persons in 1996 and this is set to rise to 1,000 by 2011. From the preliminary results of the 2002 Census, it is derived that the DED within which Ballivor is located experienced over a 50% increase in population between 1996 and 2002 which indicates that the planned population of the centre is en route to being achieved by 2011. Ballivor is designated as a Major Service Centre within the Trim Development Area in the County Urban Settlement Structure and as a Level 4 Local Centre in the GDA hierarchy. It is a limited centre in terms of functions and diversity and within the County Retail Hierarchy is identified as a Tier 2 Level 4 Village Centre.

5.16 The centre is characterised by a wide street running along an east – west axis. Two roads leading to Kildalkey and Kinnegad intersect the street from the north and south respectively. Everyday needs are met predominantly by symbol group stores (Mace (attached to the petrol filling station), Centra and XL Stop & Shop). Main shopping needs are met in larger centres with main food shopping being largely undertaken in Trim and Mullingar, particularly the latter given the better range and quality of offer. There is limited scope for any real expansion of retail floorspace in the village and to a degree this is reflected in the lack of market interest.

Bettystown

5.17 Bettystown forms part of the Laytown-Bettystown-Mornington cluster, which has been identified as a strategic growth centre in the East Meath Development Plan 2000. The town is within the catchment of the East Meath Corridor. It is located on the east coast, south of Drogheda and close to the N1 and benefits from the Dublin-Belfast rail services that stop at Laytown. Review of the GDA retail hierarchy against other factors places Bettystown as a Tier 1 Level 4 Small Town Centre in the County Retail Hierarchy. At 1996, the combined population of the cluster was nearly 3,700 and the target is 11,500 by 2011. This size of centre in a County, GDA and overall country context is not a small town, accepting that is part of a cluster of centres. Its position and designation within the County Retail Hierarchy will require to be monitored and reviewed over the timescale of the Retail Strategy to ensure that it has the appropriate designation within the County and GDA retail hierarchies.

5.18 The town is the largest retail centre in the cluster but, even with Laytown, for the existing population the *'centre'* is under provided for when compared with other towns of a similar size. It is a poor quality town centre that requires investment in the public realm and the redevelopment of sites. To date, a new Londis convenience supermarket has opened at the southern edge of the town centre. This has associated car parking and accounts for 65% of the total net convenience floorspace in the town. It is thus an important boost to the town's retail offer. A key asset is the town's coastal location and attraction which could be enhanced to the benefit of local people and visitors alike.

5.19 Bettystown has witnessed considerable residential development over recent years due to its accessibility to both Dublin and Drogheda by road and rail. The Bettystown Action Plan indicates that residential development is being encouraged and includes a specific objective to provide a railway station west of the town to further facilitate the its development. In view of its continuing population expansion, it is clear that there will require to be considerable enhancement of retail floorspace in the town, and the cluster it forms a key part of, over the timescale of the County Retail Strategy. The Action Plan has identified town/local centre activities west of the existing town centre to allow it to make gradual transition towards tourism and commercial leisure related uses thus maximising its coastal location. In addition, a masterplan/vision has been prepared in close consultation with local people, which will further serve to enhance the environment and attraction of the town. However, currently there is no evidence of market interest in further retail development. The zonings to accommodate the scale required appear to be in place and whilst the market is likely to respond to residential growth it may require to be directed to the town by marketing and promotion. This is particularly important given the town's close proximity to Drogheda, which is a Tier 1 Level 3 centre in the national retail hierarchy, and Louth County Council's objective of promoting and strengthening the larger town's retail offer.

Clonee

5.20 Clonee is located adjacent to the Meath – Dublin County boundary just 16 kilometres from Dublin City Centre and adjacent to the N3 National Primary Route. Close by is the GDA Major Town Centre of Blanchardstown in neighbouring Fingal which has a major influence on the scope and potential of Clonee as a retail centre even as its population increases. Located in the South Meath Fringe Corridor, Clonee is designated a Major Service Centre within the Dunshaughlin Development Area in the County Urban Settlement Structure. It is a Level 4 Local Centre in the GDA hierarchy and, based on population, retail floorspace and diversity of functions/services, is designated as a Tier 2 Level 4 Village Centre within the County Retail Hierarchy.

5.21 There are few retail outlets in the village, which can to a degree be attributed to Clonee's proximity to Blanchardstown and its regional level retail offer and attraction. However, there has been recent small scale retail development as part of small mixed use schemes. Population size and potential must be acknowledged as limitations on any substantial growth of the centre's retail offer although population estimates appear modest given Clonee's strategic location and potential. It had a population of less than 200 persons in 1996, which is set to rise to 1,325 by 2011. The increase, while major set against the starting baseline, is small when considered with other centres in around the County and its close proximity to the Metropolitan Area. The preliminary results of the 2002 Census are not available to confirm whether Clonee is moving towards meeting its target.

5.22 Potential and needs could be met by infill and redevelopment opportunities along the main street. A potential new focal point for the village could be created around the road network but, unless there is a greater growth in the local population, it is unlikely that this will materialise over the timescale of the Retail Strategy. This noted, the County Plan has zoned an extensive area north of the dual carriageway for employment generating uses. South of the N3 dual carriageway, the Plan has made provision for residential, town centre and amenity uses. It has also zoned additional lands for town centre uses to the north of Main Street. Inherent traffic issues are addressed with a proposed distributor road that will alleviate congestion and facilitate access to residential areas south of the village. The Clonee Draft Framework Plan 2001 includes an urban design analysis of the village. In this, an alternative relief road has been indicated to link the northern junction onto the N3 with the residential areas to the south.

Drogheda Environs

5.23 Drogheda is one of the two principal centres in neighbouring County Louth across the north eastern boundary of the County some 26 kilometres from Navan and 48 kilometres from Dublin. Part of the town's environs sit within Meath and as such require to be taken account of in the County Retail Strategy. It is located in a strategic position on the Dublin to Belfast economic corridor, supported by railway line and motorway links. Drogheda has seen more growth in recent years than its counterpart Dundalk due to its proximity to Dublin and the pressure for housing.

5.24 The County Plan stresses that the environs area within the Meath jurisdiction will be addressed in the context of Drogheda as a whole rather than the needs of the environs area in isolation. The County Council endorses the development of Drogheda as a major development centre. It is recognised as a Major Urban Centre and the environs are within the Slane Development Area in the County Urban Settlement Structure. The importance of Drogheda as a key centre is acknowledged in its designation as a Level 1 Tier 3 centre in the national retail hierarchy. As an expanding town and centre the retail needs of its growing environs need to be taken into account in the

County Retail Strategy. The environs had a population of less than 800 persons in 1996 which is set to significantly rise to 10,000 by 2011, this is a major increase when set against the starting baseline.

5.25 The County Plan recognises that given the strategic asset of the M1 corridor then there is scope for an alternative regional shopping and commercial centre in the environs area which could have detrimental effects on the existing town centre. The County Plan supports the development of the existing town centre for town centre uses through the promotion of only local convenience type retail uses in the environs area. This is translated in the Louth County Retail Strategy to mean that local and/or neighbourhood shopping needs in local residential areas are accommodated to an extent which is justified by the size of the neighbourhood catchment population and through the imposition of floorspace 'cap' measures. Given the substantial increase in population and the emerging new major residential areas, this Strategy requires to consider and resolve whether neighbourhood centre levels of provision can meet needs in a sustainable way. Having regard to the scale of residential development in the south Drogheda Environs area for example, including its wider rural/hinterland catchment, lands at Colpe Cross are considered to be such as could reasonably accommodate a retail development of neighbourhood/small district centre scale. The scale and nature of this type of development would be subject to the findings of a Retail Impact Study and Traffic Impact Study.

Duleek

5.26 Duleek is located in the eastern part of the County between the N1 and N2 on the old railway line between Drogheda and Navan. It is a Major Service Centre within the Slane Development Area in the County Urban Settlement Structure and is designated a Level 4 Local Centre in the GDA Hierarchy. Based on a review of population, floorspace and the diversity of existing uses, Duleek is identified as a Tier 1 Level 4 Small Town Centre in the County Retail Hierarchy.

5.27 In 1996, Duleek had a population of 1,731 and by 2011 this is set to rise to 4,000. It is well on the way to exceeding the 2011 target based on recent trends. This is evidenced by the preliminary results of the 2002 Census which indicate that after years of little growth, Duleek's population expanded by 20.5% to 2,934 between 1996 – 2002. It has a compact, attractive and historic town centre which suffers from congestion at peak times. The majority of retail activity is confined to the north side of the main street. It primarily meets daily rather than main shopping needs with these being predominantly met in Drogheda, Navan and Dublin. Its proximity to Drogheda means that most of the town's middle order shopping needs will be met there. This trend is likely to be reinforced as Drogheda's retail offer continues to improve commensurate with its status as a Tier 1 Level 3 centre in the national retail hierarchy. However, given that Duleek's population is set to double by 2011 then to better meet the needs of the current and future population then further convenience floorspace will be required. At present, there is a lack of market interest in developing new retail floorspace which could be as a result of its proximity to Drogheda. The mix of town centre renewal opportunities combined with the other zoned lands will be sufficient to meet the quantum of floorspace that is likely to be required over the timescale of the Retail Strategy. These include the site identified in the County Development Plan for an integrated mixed use commercial and residential development on an edge of centre site located between the main street and the Paramaddon River. Tourism is also identified as a potential sector to build on with land identified on Drogheda Road for this purpose. However, the Council may have to take a more proactive role in promoting the scope and potential of the town if these opportunities are to be realised.

Dunboyne

5.28 Dunboyne is situated just 19 kilometres from Dublin City Centre adjacent to the N3 National Primary Route that links Dublin and Cavan. It is located in the South Meath Fringe Corridor and is designated as a Major Service Centre in the Dunshaughlin Development Area in the County Urban Settlement Structure. The town is designated a Level 4 Local Centre in the GDA retail hierarchy. It has a limited retail offer but is set to be a key centre in the County with its population to grow from 3,080 in 1996 to some 10,000 by 2011. Based on the preliminary results of the 2002 Census and the information available on the DEDs covering the town, Dunboyne currently has a population of 7,755 and well on course to exceed the 2011 target. It is thus clear that Dunboyne is a growing town and on this basis it is identified as a Tier 1 Level 4 Small Town Centre in the County Retail Hierarchy. As with Bettystown, the scale of growth and increasing importance of the town requires to be monitored and reviewed to ensure that the status and designation of Dunboyne is at the appropriate level the County and GDA retail hierarchies in order that retail potential is not inhibited.

5.29 There are a number of infill sites around the green that offer some scope for redevelopment which could provide the potential for strengthening the town centre and its urban fabric. It suffers congestion from its location at the crossroads of routes between Maynooth, Summerhill, Clonee and Dunshaughlin. This brings high volumes of heavy traffic, particularly HGVs, which reduce the amenity of the town centre. Whilst Dunboyne’s retail offer is limited, its importance in its catchment area is better reflected by the diversity of its services and town centre offer. However, its potential is eroded by the town’s easy access to the Major Town Centre of Blanchardstown in neighbouring Fingal. The County Development Plan addresses the issue in land zonings that provide for an integrated mixed use development area east of the former railway line. This has been taken forward by the Council in a brief for this urban extension being put out to tender. Additionally, a bypass of the town centre is identified which will assist in alleviating traffic congestion. The timescale for this objective has not been identified. Traffic issues could undermine the potential of the quantum of retail floorspace needed being delivered at least in the period to 2006.

5.30 Despite its location and potential, to date there has only been limited market interest in new retail floorspace in Dunboyne. It is clear that there is a need for enhancement of the town's retail offer but this may only be achievable at a smaller scale than is desirable due to the proximity of Blanchardstown. The key fact is that the zonings and potential sites are in place. The Council may have to consider being more proactive in promoting this potential. The brief for the town centre expansion is an important first step in the process. In addition to the town centre, it is important that the more local needs of Dunboyne's expanding residential areas are met with a network of neighbourhood and district centres anchored by supermarkets and superstores as appropriate.

Dunshaughlin

5.31 Dunshaughlin is located in the South Meath Fringe Corridor almost halfway between Navan and the M50. It is designated as a Major Service Centre in the County Urban Settlement Structure within the Dunshaughlin Development Area. The centre is classified as a Level 4 Local Centre in the GDA hierarchy. As with the Bettystown cluster and Dunboyne, Dunshaughlin is identified as one of the key growth centres at this level in the County Urban Settlement Structure and GDA hierarchy. This is reflected in the fact that from its 1996 population of 2,139, it is set to grow to a town of 10,000 by 2011 which is a large sized centre in the County, GDA and national contexts. The town is well on course to achieve this based on the preliminary results of the 2002 Census, which indicate Dunshaughlin has a population of 4,935. From the review of Dunshaughlin's current characteristics, it is designated as a Tier 1 Level 4 Small Town Centre. This designation and its appropriateness require to be monitored and reviewed over the timescale of the County Retail Strategy.

5.32 The town sits on the N3 National Primary Route and suffers from the congestion that this brings. Dunshaughlin Town Centre is characterised by a number of small independent shops offering a selection of comparison and convenience goods with on street parking lining Main Street and the Circular Road Retail Parade. While it offers a range of goods and services, the primary convenience outlet is a small Super Valu west of the main thoroughfare on the Circular Road Retail Parade. Comparison floorspace is some 51% of the net total floorspace in the town with bulky goods accounting for a further 21% of the total. These statistics indicate a low representation of convenience floorspace for a town of this size and level in the County Retail Hierarchy.

5.33 The County Development Plan highlights the potential Navan to Dublin rail link passing along the northern boundary of the town but at present there is no programmed commitment to reinstating this key rail link. Additionally, there are road proposals that will enhance Dunshaughlin's attraction and accessibility as a place for living, working and leisure, including shopping. The Plan attributes the growth of the town to its close proximity to Dublin. The rapid pace of residential development in

Dunshaughlin has not been balanced with investment in commercial floorspace and community services. If it is to develop its role beyond that of a commuter town then this will require to be addressed. The Plan highlights that although there is a suitable land within the central area its ownership is fragmented thus hindering the speed of its development. Three main sites have been identified in the Plan for town centre uses:

i **North East Town Centre Site:** this is an edge of centre site which includes Madden's and the adjacent land. It has the potential to be extended to the rear of the street. The site is currently vacant and is zoned for town centre uses. Its potential will require to be market tested and may need the Council to play the role of enabler in terms of site assembly. The issues imply that this will not be a site that will be developed until post 2006;

ii **South East Town Centre Site:** this will be created with the relocation of Garda Station, Fire Station and Eircom. An objective of the Plan is to reserve this area for civic uses. It may be appropriate to include a range of retail outlets at this location to assist in realising this objective; and

iii **Behind Main Street:** this is a suite of sites located to the rear of the frontage buildings on the western side of Main Street which are proposed for town centre uses. The attraction of the location should benefit from its proximity to the established Super Valu.

5.34 In contrast to many other centres in the County, there is market interest in development in the Dunshaughlin Town Centre. Set against existing provision, the current extant permission would provide an additional 1,356m^2(net) of mixed retail floorspace which will almost double the amount of floorspace in the town. In view of the projected size of the town, there will require to be additional enhancement of retail floorspace and in particular convenience floorspace, given that middle and higher order comparison needs will continue to be met in the higher level centres of Navan, Dublin City Centre and Blanchardstown. For enhancement to be achieved land assembly issues will require to be addressed.

Enfield

5.35 Enfield is located on the western edge of the South Meath Fringe Corridor close to the County Kildare boundary, some 42 kilometres from Dublin City Centre. It is located within the Trim Development Area. Enfield is designated a Major Service Centre in the County Urban Settlement Structure and a Level 4 Local Centre in the GDA hierarchy. At 1996, the centre had a population of 566 and it is set to grow to some 2,000 people in the County Development Plan by 2011. Founded on the preliminary results of the 2002 Census, the population is already at nearly its 2011 target and given Enfield's strategic location and potential then it is clear that this will be exceeded. In the review of the County's centres, Enfield is designated as a Tier 2 Level 4 Village Centre.

5.36 The limited number of retail outlets are located along the main street. A cluster of shops at the eastern end of the village appears to represent the hub in terms of retail activity, gravitating around Dixon's Supermarket and a petrol filling station. In terms of accessibility, Enfield is well positioned to take advantage of its proximity to Dublin City Centre, Mullingar and the M50 shopping centres, specifically Liffey Valley. Previously, Enfield was a highly congested centre but the opening of the village bypass/outer relief road in 2002 has reduced through traffic travelling between Dublin and both Galway (N6) and Sligo (N4). While a good deal of heavy traffic has been diverted, considerable levels still continue to pass through the centre due to the directness of the route. The accessibility and attraction of Enfield will be further enhanced when the rail line and station are reopened. This will provide a limited commuter service to Dublin.

5.37 The County Development Plan promotes that Enfield should continue to consolidate development with a particular focus on amenity and tourism potential, associated with the Royal Canal, and on opportunities for rail-based development linked to the commuter rail line. It is recognised that potential population growth will require a degree of urban expansion in the village. Given its strategic location, it is envisaged that Enfield will become an important centre in the County in the longer term. Even with its strategic and access benefits, at present there is a lack of market interest in retail development in and around the village. Existing retail outlets largely meet daily convenience needs. Main food and higher order shopping needs are met predominantly in larger centres, specifically Mullingar and Liffey Valley. Noting this, two areas of development potential have been identified:

- **East of Main Street:** this site is located to the rear of Dixon's Supermarket and the petrol filling station. It would facilitate the expansion of the existing supermarket. This could be achieved in the period to 2006 if market interest materialises.

- **West of Main Street:** this site is located on the southern side of the street. There are no existing structures on this site and thus it could be brought forward with relative ease.

Both sites are zoned for town centre uses and both may be accessed from the Main Street. Due to the bypass/relief road, traffic is not likely to be an issue.

Kells

5.38 Kells is located within the Navan-Trim-Kells Corridor and is designated as a Major Urban Centre in the County Urban Settlement Structure. It is a Level 3 Sub-County Town Centre in the GDA hierarchy and this is confirmed in the County Retail Hierarchy.

5.39 It is located 16 kilometres from Navan on the junction of the N3 Cavan to Dublin National Primary Route. Kells is an attractive historic town enriched by buildings and structures from the Monastic, Anglo-Norman and Georgian periods. As a consequence, it has a number of listed buildings and archaeological sites which together will constrain the potential for development of particular areas close to the town centre. The fragmented ownerships that prevail could also constrain potential being achieved. The town sits at the junction of a number of Cross County routes including Oldcastle – Slane, Athboy – Moynalty and Carlanstown – Mullingar. This brings a considerable volume of traffic travelling through Kells Town Centre which detract from the amenity of the heritage and urban fabric of the town. Local traffic management issues further exacerbate the congestion. This will be alleviated by the construction of the proposed N3 bypass, which is identified to the west of the town in the Kells Development Plan 2001. Additionally, the Plan makes provision for a link road where the Mullingar road (N52) and the proposed N3 corridor intersect.

5.40 Kells has a range of retail, business and commercial floorspace. The primary convenience outlet is a Super Value store located in the Kells Shopping Centre on the Cavan Road. Outlets selling convenience goods account for 35% of total net floorspace whilst 62% is comparison. This reflects the quality and attraction of the centre but, as a Sub-County Town Centre, it should have a greater and better convenience offer. To put this in context, other Sub-County Town Centres in the GDA include Arklow and Balbriggan which are both witnessing considerable market interest and proposals to significantly enhance their retail offer and these proposals are well advanced

5.41 The Kells Development Plan 2001 encourages the sustainable development of the town as a major commercial, employment, social and tourist centre in the northern part of the County. However, currently the range and nature of retail provision does not meet the main shopping requirements of local people and the town's catchment area. As such local people must travel to meet these needs with key destinations being Navan and Mullingar as well as Dublin City Centre and the M50 centres for higher order comparison shopping. There is the potential for this to be redressed through the redevelopment and renewal opportunities along the main shopping streets in the town centre. These sites have been identified in the 2000 Town Renewal Scheme as approved by the DoELG and are:

- **Bective/Farrell Street Site:** this edge of centre site to the south of the town centre provides the scope for expansion of the town centre. It has the potential to enable the creation of a new street with a shopping centre and associated parking anchored by a supermarket/superstore. The site's accessibility would be enhanced by the proposed network of distributor roads from the Cookstown Road, the Navan Road and Bective Street. Whilst the site has had tax incentive designation since 2000 market interest has not materialised.

- **Cannon/Suffolk Street**: this edge of centre site is similar to the Bective/Farrell Street site. It is located to the south west of the town centre bounded by the backlands from Bective Street and Cannon Street. The area is zoned for residential and amenity uses. It could be accessed from Bective Street or Cannon Street with pedestrian linkages created through Bective Street and Suffolk Street to the town centre. Again, there has to date been no market interest in progressing the opportunity.

5.42 For Kells to sustain its role and importance as a Sub-County Town Centre then there will require to be a considerable strengthening of the town's retail offer, particularly in respect of main food shopping although there is a need also to improve its comparison floorspace. It will require realising the opportunities within the town centre through land acquisition and site assembly. The alternative is that if needs are to be met better locally and the town's offer is to be strengthened then edge of and out of centre opportunities across all sectors of the retail market may need to be looked to. The priority must in the first instance be the consolidation and enhancement of the town centre. Finally, there is also a need to better harness Kells' heritage and tourism offer to the benefit of the town and its attraction.

Kilcock Environs

5.43 Kilcock is located 30 kilometres from Dublin abutting the western boundary of Meath in County Kildare. It is a rapidly developing major centre within the Metropolitan Area as identified in the SPG. The environs of Kilcock within Meath are located in the Dunshaughlin Development Area of the County and thus, as with the Drogheda Environs, they have to be taken into account in the County Retail Strategy. The County Plan has not given any designation to the Kilcock Environs in the County Urban Settlement Structure. The County Plan however envisages that the population will grow to 5,000 by 2011. Within the Kildare County Development Plan 1999, Kilcock is designated as a Primary Growth Centre in its hierarchical settlement pattern with a potential population of 4,600 to be achieved by 2006. Within the GDA retail hierarchy, Kilcock is designated as a Level 3 Town and/or District Centre in the Metropolitan Area. The Kildare County Retail Strategy is currently in preparation and this will require to be taken account of.

5.44 The town is bypassed on its northern side by the M4 motorway which links Dublin to Sligo and Galway. Kilcock benefits from the Royal Canal and the Dublin to Galway/Sligo railway line which passes through its centre. The majority of development in Kilcock has occurred on its southern side between the town centre and the M4 in Kildare driven by demand for housing for people commuting to Dublin. Development in the environs area is confined to ribbon development along the Moyglare Road. Apart from this, the area within the Meath County boundary is under agricultural use. As there is high level of under utilised space within the existing town centre the County Plan does not propose town centre use in the environs area. It endorses Kildare County Council's Kilcock Development Plan 2001, which has the objective of focussing town centre uses in its traditional core. Development of Kilcock Environs is subject to the Kilcock Local Area Plan.

Laytown

5.45 Laytown forms part of the Laytown-Bettystown-Mornington cluster and is within the catchment of the East Meath Corridor. It is located on the east coast, south of Drogheda, close to the N1 and has the benefit of direct access to Dublin-Belfast rail services. Review of the GDA retail hierarchy against other factors place Laytown as a Tier 1 Level 4 Small Town Centre in the County Retail Hierarchy but only as it is part of the sub regional cluster of towns dominated by Bettystown. In its own right within the County Retail Hierarchy, Laytown is more appropriately a Tier 2 Level 4 Village Centre. The strategic characteristics and potential of the cluster have been highlighted under the examination of the potential of Bettystown. Below we focus on those that are specific to Laytown.

5.46 The centre has developed in two small clusters of shops and other services along the main street. It is a poor and small retail centre with the majority of shopping needs being currently met in Drogheda. The East Meath Development Plan has identified a development boundary around Laytown within which the centre may grow. There are no specific zonings that would provide for the enhancement of the town centre. In addition, there is a no market interest in new retail floorspace in the town. The combination of these facts indicates that the retail heart and strength of the cluster should be Bettystown with Laytown playing a supporting role.

Navan

5.47 Navan is the most important retail centre in the County. It is a Level 2 Tier 3 centre in the national retail hierarchy and a Level 2 Hinterland Area County Town Centre in the GDA hierarchy. In respect of the former, only Dublin City Centre and the regional capitals of Cork, Galway, Limerick and Waterford are in the upper two tiers of this hierarchy. Within Tier 3 of the national hierarchy, it is designated at a level below a number of competing towns in neighbouring counties. These are Drogheda, Dundalk and Mullingar. In the national hierarchy, accepting that there are some anomalies, it is on the same level as Arklow, Athy, Naas and Swords. Within the GDA hierarchy, it is one of the Hinterland Area equivalents to the Level 2 Major Town Centres within the Metropolitan Area. These include the following North Dublin competitors of Blanchardstown, Liffey Valley and Swords. In the Hinterland Area, the other Level 2 County Town Centres are Naas/Newbridge/Kilcullen and Wicklow Town.

5.48 Navan is located in Navan-Kells-Trim Corridor and is designated as a Regional Centre in the County Development Plan Urban Settlement Structure. This importance is further endorsed in the County Development Board's Integrated Strategy. The County Development Plan envisages that the population of Navan will grow from 11,706 in 1996 to 60,000 persons by 2011. The Draft Navan Integrated Development Framework Plan (the Draft Framework Plan) adjusts this to the year 2016. At present the population of Navan and Environs is estimated to be 22,000 and thus the adjustment based on recent trends presents a more realisable timescale. The increase in population from 1996 is significant with the town growing from a market town to one of the larger settlements in the GDA largely due to the inflow of population from the Metropolitan Area. Navan already dominates the retail patterns of the County due to the quantum and quality of its offer. What is not fully recognised in the town is an appreciation of the town's strengths and assets, its heritage importance and role in the County's development. This is acknowledged in the Draft Framework Plan and should be captured and promoted in any strategy related to the town and its offer.

5.49 Whilst there are a series of growth centres around the County that are maturing in terms of size and potential, as a Primary Development Centre in the SPG Navan will require a significant level of new retail and other commercial floorspace if it is to achieve its role and potential as a major centre within the GDA. In addition, this is needed if it is to effectively compete with the main centres in neighbouring counties and the continuing growth and importance of out of town centres around the M50, particularly given the improvement of road and rail communications. Navan to date has sustained its role and importance, largely due to its relative distance from Dublin City Centre and the relatively poor transportation networks that have prevailed. As such, it has higher levels of expenditure retention than other centres closer to the national capital and the increasing circle of shopping centres that surround it.

5.50 With the preparation of county retail strategies across the country, and those in neighbouring counties being of particular importance, the facts, issues and potential are now known and a more competitive retail environment is emerging. In addition, there are the implications of the impact of the NSS on the towns such as Navan, which were not designated as new gateways or hubs although its importance is recognised in its designations as a County Town and Primary Development Centre. This could affect the town's competitiveness and in the longer term result in changes to the national retail hierarchy. The message is that the County Retail Strategy requires to fully address these issues and ensure that Navan sustains and enhances its role and position in the national and GDA retail hierarchies.

5.51 Additionally, it is important that the framework and policies emerging in the County Retail Strategy for Navan should be consistent with the proposals that are emerging from the Draft Framework Plan. This is to ensure that there is clarity and a consistency of advice and policy emerging from these two key studies given the role that they will play in the future development of the town into a regional capital. The Draft Framework Plan and its recommendations have therefore been reviewed in the preparation of this Strategy. Importantly, in respect of the Retail Strategy and our evaluation of the retail potential of Navan, the principles set down in the Draft

Framework Plan are overall in accord with those we have identified for meeting the town's potential although there are some details where we would seek variation. We highlight these and other factors in our identification of retail potential in the paragraphs that follow.

5.52 The above provides the context and framework for assessing and setting out the potential of Navan in the national and GDA retail hierarchies and indicates what is required to enhance the town's role and importance as it grows into a centre of some 60,000. Additionally, we highlight some other key facts and considerations which influence our assessment of retail potential below:

i Swords have nearly 55,000m^2 of retail floorspace, considerable market interest and a population that is of the order of 25% larger than that of Navan. It is a strong and attractive Major Town Centre in the GDA and is set to expand further over the timescale of the Fingal County Retail Strategy. The current size of Swords and the quantum and quality of its floorspace provide markers in respect of the additional floorspace that should be located in Navan as it grows to its target 60,000 population by 2016. It confirms that there should be a significant expansion of floorspace in the County Town over the period of the County Retail Strategy to 2011. This is consistent with the guidance set down in the GDA Retail Planning Strategy;

ii Mullingar has a population of some 23,000 based on the preliminary results of the 2002 Census and is thus comparable in size to Navan. At present, it has over 10,000m^2 more retail floorspace than Navan and provides in the Lakepoint Retail Park more retail warehousing space than the whole of Meath. This gap requires to be redressed in the County Retail Strategy if Navan is to sustain its and the County's competitiveness particularly given that Mullingar is identified as a *'new gateway'* in the NSS as part of the designated gateway triangle with Athlone and Tullamore. This should result in Mullingar growing in size and economic attraction, which could have implications for Navan and the County. However, Navan is evidenced to be a strong and growing centre and as such based on current trends is likely to keep pace with Mullingar particularly if the right development plan and retail policies are in place and implemented. Additionally and of importance to the competitiveness of Navan is the recently published Westmeath County Retail Strategy. Given the NSS designation and the forecast growth of Mullingar, the strategy is conservative in its objectives and places great weight on retail development being located within the town centre although no sites are readily available to achieve this objective in the timescale of the retail strategy. For the Mullingar to sustain its importance and enhance its higher order high street comparison floorspace, in accordance with its role in the national retail hierarchy, the strategy does not provide the guidance or direction. It also does not provide the policy framework for main food shopping needs to be met with limitations on the development of convenience floorspace and district centres in the period to 2008(the timescale of the Development Plan). Noting this, the Meath County Retail Strategy requires to ensure that it has the policy framework in place to enable Navan to overtake Mullingar in its retail profile and quantum; and

iii The Louth County Retail Strategy promotes the strengthening of Drogheda as one of the principle shopping centres in the county. It is important that Navan continues to be a strong centre in order that any improvement of Drogheda is counterbalanced and there continues to be a high retention of spend within Meath, particularly in respect of centres in the County that are close to Drogheda.

5.53 Navan's strong position in Meath's retail profile is illustrated by the fact that the town and environs account for approximately 34% of the convenience, 51% of the comparison and 75% of the retail warehousing net total floorspace in the County. It has a relatively compact town centre with the main shopping areas within and around Kennedy Road, Ludlow Street, Market Square, the Navan Shopping Centre, Railway Street, Trimgate Street and Watergate Street. The town centre provides a wide variety of higher/middle comparison and convenience goods in a range of retail outlet sizes. As befits a county town, there is a good range and diversity of other town centre functions and activities. It is a busy and vibrant centre but, as highlighted in the Draft Framework Plan, there is scope for improvement in terms of the range, quality and quantum of retail floorspace and other town centre activities plus the general environment of the centre. This is particularly true if the town is to significantly grow its offer, importance and attraction. The scope of this and what it means requires to relate to the broad assessment of the requirement for additional floorspace in the County in Section 3 and the guidance provided in the GDA Strategy. The broad assessment identifies the significant potential for new floorspace in the County over the period of the County Retail Strategy. The GDA Strategy states the following in respect of how this should be distributed and is of great importance to the approach that should be adopted to new retail development in Navan, noting that the first statement has already been reappraised in respect of the potential of Ashbourne:

'It is recommended that any future retail warehousing should be concentrated at Navan where there is potential for retail park development in the longer term.'

and

'The other comparison retailing should be concentrated on Navan, with probably an allowance of not much more than 30% of the indicative potential allocated to other centres. The relevant centres are Kells, Trim and Ashbourne (where consent for some development already exists), all of which are designated Sub-County Retail Centres in the Hinterland Area.'

5.54 In accord with its role as a major centre within the GDA hierarchy, Navan should continue to be predominantly a comparison shopping based centre although convenience floorspace will remain important in the overall role and attraction of the town. To ensure it and the County's competitiveness is sustained then, consistent with the GDA Strategy, Navan should be the focus for the majority of Meath's new comparison floorspace. Given the issues associated with the delivery of town centre retail schemes and retail floorspace as a whole then at the County level the guidance provided by the GDA Strategy is well acknowledged but there is a need to adopt a more flexible than prescriptive approach. This is wholly consistent with the guidance provided by the GDA Strategy which as has been noted highlights that *'the Strategy is required to provide indicative advice on the scope for new development and how the associated floorspace might be distributed.*

5.55 As such, based on the analysis and review of the County's centres and potential then whilst the majority of the additional comparison floorspace should be located in and around Navan, the potential 'cap' of only allowing 30% of comparison floorspace in the remainder of the County's centres is considered to be too high and this is reflected in the distribution of new floorspace in the County Retail Strategy.

5.56 At present, Navan has a relatively limited range of brand name national and international comparison multiples and this is the market that it should seek to attract if it is to stem the flow of this expenditure from the town and County to other centres. These operators will require prime pitch locations at the heart of the town centre. The potential is there for this to be achieved by greater intensification of development within the town centre through the redevelopment of the central surface car parking areas that dominate the heart of the centre. Currently, these detract from the ambience and environment of the town centre and, as acknowledged in the Draft Framework Plan, provide a more suburban than urban character to the town centre. It is an opportunity that few centres of the size and importance of Navan have and should be harnessed. This will ensure that retail and other town centre activities are retained within the town centre rather than be dissipated to more peripheral areas which could result in displacement of the prime shopping focus and impact on the vitality and attraction of the existing core retail area. Achieving consolidation and intensification of retail development and other town centre uses within this area should be a priority over the period of the Retail Strategy to 2011. It is acknowledged that this has road and transportation issues and these will require to be addressed in parallel to any consideration of proposals for additional floorspace within the town centre. They should not be allowed to constrain major town centre development as this will effectively result in Navan failing to achieve its potential or sustain its competitiveness. It will however require creative approaches to resolving the issues.

5.57 Shopping is only one of the attractions of a town or city centre. The above addresses the retail component of the equation. In Navan, this must be pursued in conjunction with a significantly enhanced public realm that establishes a sense of place, which embraces and celebrates the strong history and heritage of the town. This is consistent with the analysis and recommendations of the Draft Framework Plan. It requires an urban framework plan that focuses on spaces, buildings, linkages, design and interpretation of the town's heritage through sculpture and other forms of public art. Additionally, whilst Navan is an established centre for eating, meeting and greeting, this could be greatly enhanced as part of the overall experience of the centre.

This should be within the town centre but also there is scope and potential for a new quarter to be created along the riverside that provides the mechanism for the town centre and the town as a whole to better link with this asset that has played a key part over time in the town's development.

5.58 The Retail Strategy must be forward looking in respect of the development of Navan into a city and regional capital over the period to 2016. Decisions today must therefore not compromise what will be required to sustain and expand the town centre over the years that follow. From our work on other retail strategies around the country, the town and city centres are too small for their expanding populations and the retail needs and potential that require to be met. As a consequence, edge of centre but primarily out of centre locations are having to be looked to as central area sites are assembled with all the complexities and issues that this brings. Navan, in contrast to these centres, has potential for expansion of the town centre on sites and areas adjacent or close to the existing centre. Our site appraisals indicate the same range of locations as those identified in the Draft Framework Plan, namely Fairgreen, the GAA ground and associated lands and around the proposed new station. To sustain the strength of the town centre it is important that town centre development/expansion, as far as is practicable, moves sequentially across this area and that all proposals ensure a continuum and real linkage. Being forward looking does not always meet current day needs and development pressures. As such, we would advise against pursuing the development of these strategically important sites and areas for mixed use development that would towards the end of the Strategy's timescale and the years beyond reduce the potential for the sequential growth of the town centre.

5.59 The retail expansion and development of Navan requires not only to address the town centre but also its expanding residential areas and other retail sectors. Firstly, we address the former. Consistent with the Draft Framework Plan, we would endorse the need to ensure that retail and other community needs are met around the town centre in areas of existing and expanding residential development. At present, there is relatively limited provision in neighbourhood shopping around the town. The main locations are Beechmont Shopping Centre to the south, Blackcastle in the north and on the Ratholdren Road. The strategic framework set out in the Draft Framework Plan of three sectors defined by the Blackwater and Boyne rivers is also appropriate to the spatial distribution of retail floorspace. This should comprise a mix of neighbourhood and district centres that are predominantly convenience floorspace with supporting community services. The scale of development should be linked to population size and potential in each sector. For a settlement of its size and importance, Navan requires to have better convenience offer in its suburbs. This will not compromise the attraction and strength of the town centre as well illustrated by reference to other centres at the same level in the national retail hierarchy and the principle that Navan Town Centre should be predominantly a comparison shopping destination. Based on the retail floorspace capacity assessment, there is scope for a larger format convenience floorspace in each of the three sectors of the town's suburbs as the anchor for a range of local services and other convenience floorspace.

5.60 It has been highlighted that whilst Navan has some 75% of the County's retail warehousing/bulky goods floorspace, the Lakepoint Retail Park on the edge of Mullingar provides more retail warehousing floorspace in this one location than is available in Meath as a whole. Based on the GDA Strategy floorspace baseline, there is under 7,000m^2(net) of retail warehousing floorspace in the County with of the order of 5,200m^2 in and around the County Town Centre. At the County level this is 9.7% of total net retail floorspace. With reference to the GDA Strategy, this states:

> *'The existing level of retail warehousing provision consumes around 15% of comparison expenditure. This represents a reasonable planning target, specifically for bulky goods retail warehousing. The existing distribution* (in the GDA) *is however not evenly spread with a few major concentrations. In determining the future retail capacity of any area, regard should be had to the degree of local under-provision and proximity/accessibility to an existing or planned concentration of retail warehousing. The greater the local deficiency and the less the accessibility, the stronger the argument for local enhancement.'*

5.61 From the above, it is clear that the County is under-provided for in terms of retail warehousing floorspace, particularly against that available in neighbouring counties. People in the County therefore have to travel to meet the majority of these needs and this brings the potential of further leakage of expenditure through the propensity for linked shopping trips. It is important that this is addressed through the framework provided by the County Retail Strategy with Navan being the key location for any new retail warehousing floorspace, acknowledging that Ashbourne has also been identified as a strategic location in the County for a quantum of retail warehousing to redress leakage in the south of the County. Based on existing comparison and retail warehousing floorspace in the County plus the potential for additional comparison floorspace, then provision of retail warehousing floorspace should at least double over the period of the Retail Strategy. This has to be put into the context of critical mass, what would be attractive to the market and the significant potential for additional comparison floorspace in the County. As such, retail warehousing developments that are within the caps set by the RPG would be appropriate in Navan and Ashbourne, with Navan being the location for the higher end of the threshold. This however should not be taken to preclude retail warehousing development in the two other Sub-County Towns of Kells and Trim.

5.62 Finally, it is important to highlight that there is market interest in the development of new floorspace and the improvement and expansion of existing retail floorspace in Navan. This should awaken interest in the town as a location for larger scale development. It is however important that the Council influences and directs this in order that its objectives are achieved. This will require the Council to take a more proactive role in marketing its vision of Navan and its potential.

Nobber

5.63 Nobber is located in the north of the County 20 kilometres north of Navan and 12 kilometres from Kingscourt, County Cavan on the River Dee. It is designated as a Major Service Centre within the Kells Development Area in the County Urban Settlement Structure. The town has a population of 242 in 1996 which represented a decline since 1991. However, Nobber's population is envisaged to grow to 600 by 2011. The preliminary results of the 2002 Census do not provide population estimates for the centre and thus the evidence is not there to confirm or otherwise whether Nobber is on course to achieving its target. It is designated a Level 4 Local Centre in the GDA hierarchy. Nobber is a limited centre in terms of functions and diversity and within the County Retail Hierarchy is identified as a Tier 2 Level 4 Village Centre.

5.64 The centre is characterised by a wide street running along the R162 Regional Road with a north-east – south-west axis, parallel and east of the freight Navan to Kingscourt rail line. A train station west of the village centre originally served the area. Two local roads intersect the street from the north west. The former rail line forms the western development boundary of the village. Day-to-day needs are met predominantly by local shops in the village centre together with community and recreation facilities. Main shopping needs are met in larger centres with main food shopping being largely undertaken in Kells (16 kilometres) and Mullingar (61 kilometres), particularly the latter given the better range and quality of offer. There is limited scope for any real expansion of retail floorspace in Nobber. Additionally, there is a lack of current market interest in new retail investment and development. There is however potential for expansion of the retail floorspace within the centre of the village which would serve to cater for the needs of the existing and future population.

Oldcastle

5.65 Oldcastle located in the north west of the County close to the Cavan border approximately 11 kilometres from Virginia and Ballyjamesduff. It is designated as a Major Service Centre with a sub regional role within the Kells Development Area in the County Urban Settlement Structure. The town had a population of 826 in 1996. The DED within which Oldcastle is located experienced low levels of growth over the period 1996 to 2002 according to the preliminary results of the 2002 Census, particularly relative to other centres in the County. However, based on the 2002 Census results, it has almost achieved its 2011 target (2,000) now and thus there may be a requirement for this to be revised. Oldcastle is designated as a Level 4 Local Centre in the GDA hierarchy. At the County level, it is defined as a Tier 1 Level 4 Small Town Centre. Although it has a much smaller population than other towns at this level in the hierarchy, Oldcastle provides a wealth of goods and services to its surrounding largely rural catchment. Its importance as a retail centre in the County is confirmed by the fact that Oldcastle is the fourth largest retail centre in Meath (when the new floorspace in Ashbourne is included) and only one of three centres with retail warehousing floorspace. Its specific importance is recognised in the GDA Strategy.

5.66 The town's heritage, capacity for growth and potential for tourism are identified in the County Development Plan as important assets that are contributing to its growth. Whilst an attractive centre, it would greatly benefit from renewal and redevelopment of key sites and buildings which currently detract from its overall ambience. In terms of convenience floorspace, Oldcastle primarily caters for top-up shopping with main food shopping carried out in larger centres, including Navan and Mullingar. The Plan identifies lands west of Cavan Street and in the north east quadrant of the town centre as locations that are suitable for retail and other commercial development. There are no proposals emerging for either of these sites. Additionally, there are no current extant planning permissions for retail development. Traffic is an issue, albeit to a lesser degree than many of the other centres in the County. It is proposed that this is relieved in the town centre through construction of distributor roads linking Castle Street to Oliver Plunkett Street and Chapel Street.

5.67 For a town of its population size, Oldcastle is performing well in terms of the range and quantum of retail floorspace. It is not envisaged that over the timescale of the Strategy, at least in the early years, that there will be any development of major new floorspace although market interest should be encouraged. Oldcastle's important role in its catchment area needs to be sustained and improved over the timescale of the Strategy particularly in respect of convenience floorspace and there are land and buildings identified that should meet any development interest. The priority in the first instance is to achieve consolidation and improvement of the town centre through the regeneration of sites identified in the Town Renewal Scheme, particularly along Cloughan Street. As recognised in the County Development Plan, steps require to be taken to encourage the maximisation of Oldcastle's tourism potential.

Ratoath

5.68 Ratoath is located in the south eastern corner of the County approximately 30 kilometres north of Dublin City Centre midway between Dunshaughlin and Ashbourne. It is within the South Meath Fringe Corridor. The County Urban Settlement Structure designates Ratoath as Local Service Centre within the Dunshaughlin Development Area. The Plan however promotes a significant fourfold increase in population to 4,500 by 2011. Ratoath and the areas immediate to its boundaries at 2002 had a population of 5,585 – it has therefore significantly exceeded forecasts and targets. This has been taken account of in Ratoath's designation as a Level 4 Local Centre in the GDA hierarchy and within the County Retail Hierarchy a Tier 1 Level 4 Small Town Centre.

5.69 It comprises a compact linear town centre around which residential estates have grown, driven by demand from Dublin and its relative proximity to the City. The attraction of Ratoath will be further enhanced with the re-opening of the Navan to Dublin railway line and improvements to the N2. For its current size, it is poorly served by convenience floorspace and additionally the floorspace survey identified that some 33% of its retail floorspace was vacant which is a significantly high level particularly in a small centre. Local people have to travel to meet the majority of their shopping needs with Ashbourne being the main centre, particularly for main food shopping. This trend will be reinforced with the completion of the Ashbourne Town Centre shopping centre.

5.70 Positively, a courtyard style shopping mall – The Village Centre – has been recently developed comprising comparison shopping and a restaurant/cafe. In addition, at the eastern end of the town centre a new development is currently being constructed for office/retail based uses. Given the significant increase in population that is set to happen over the period of the Retail Strategy, there is a need to greatly enhance the Ratoath's convenience floorspace. This should be directed to infill sites and buildings along Main Street in order that the vacancy levels in the town centre are addressed. There will be pressure for retail development within the expanding and new residential areas. It is preferable, in the interests of growing and improving the town centre, that this should be aimed at meeting only local neighbourhood needs. However, if interest is not harnessed in the town centre due to constraints such as land ownership and assembly then such locations should be looked to meet the wider needs of the town.

Slane

5.71 Slane is located in the northern part of the County on the northern banks of the River Boyne. It sits halfway between Navan and Drogheda on the N51 which links the two higher order centres. Slane is designated a Major Service Centre within the Slane Development Area in the County Urban Settlement Structure. As with Ratoath, it is one of the smallest retail centres in Meath and experiences high levels of vacancy at some 28% of total floorspace. It is a small settlement, which is set to grow in the County Development Plan to 2,500 by 2011. Based on the preliminary results of the 2002 Census, the DEDs that can be taken to comprise Slane indicate that the population has risen to just over half of its 2011 target but relative to other centres in the County growth is low. These characteristics result in Slane being designated a Level 4 Local Centre in the GDA hierarchy and a Tier 2 Level 4 Village Centre in the County Retail Hierarchy.

5.72 It is a popular and attractive village primarily known for Slane Castle, its heritage and international concerts and events. Slane as a destination also benefits from proximity to the internationally recognised Newgrange Tomb and Visitor Centre. It is understood that its popularity as a visitor destination is eroded by the high levels of congestion that it experiences from its location on the N2 and its intersection with the cross county N51. The village has a limited retail offer with other key uses being a mix of dwellings, public houses, restaurants, cafes and a number of tourist/craft related shops. It is steeped in heritage and the quality of the streetscape and a great number of the buildings will demand a sensitive approach to integrating new retail investment within the village. This is recognised in the identification of lands for the expansion of the village centre to the rear of the existing street frontage. Additional lands are identified on the former information kiosk/car parking area and to the south of the village. However, this latter location is highly visible approaching the village along the N2 and any proposals will require to take due account of this sensitive environmental setting.

5.73 For all its attraction, there are no extant planning permissions for retail development in Slane at present. Its limited offer results in people having to travel to both Navan and Drogheda for the majority of their shopping needs. This is unlikely to change over the period of the Retail Strategy. Any interest is likely to be small scale although there is scope for increased tourism related development. This will be market driven but could be encouraged by public – private sector initiatives and marketing.

Trim

5.74 Trim is located within the Navan-Trim-Kells Corridor and is designated as a Major Urban Centre in the County Urban Settlement Structure. It is a Level 3 Sub-County Town Centre in the GDA hierarchy and this is confirmed in the County Retail Hierarchy. The town is located just over 6 kilometres from Navan on intersection of the Dublin to Athboy and the Kinnegad to Navan regional routes.

5.75 Whilst tourism is a large part of the town's economy, it is a strength and asset that is not maximised. It boasts the remains of the largest Anglo-Norman castle (Trim Castle) in the country, ruins of various abbeys and a host of other medieval remains. This noted, Trim is the third largest town in Meath and the County's third largest retail centre. It was the second largest retail centre until the new developments in Ashbourne Town Centre. Over the period to 2011, the County Development Plan sets that the town's population should more than double to 15,000. The preliminary results of the Census indicate that the target is almost halfway to being achieved with growth strongest outside of the town itself. Expansion of retail and commercial floorspace is identified as a priority within the Plan, specifically in respect of higher order shopping.

5.76 It is an attractive and vibrant centre which does not appear to suffer from the levels of congestion of many of the other towns and villages in the County. Trim has a pleasant environment and ambience. At present, some 60% of the town's floorspace is comparison with a number of outlets specialising in quality clothing. This adds further to the attraction of Trim as a place to visit and shop. For a centre of its size and importance, it has a limited convenience offer. However, the town's proximity to Navan is likely to have overshadowed its attraction for investment in larger scale convenience and high street comparison floorspace. In addition, it has relatively easy access to the Major Town Centres of Blanchardstown and Liffey Valley. As Trim grows in size over the period of the Retail Strategy, it should become more self sufficient with a greatly enhanced convenience offer. This is consistent with the objectives of the Trim Development Plan 2002 which aims to facilitate the expansion of the commercial and business sector of the town to support its growing residential base.

5.77 To achieve an increase in retail floorspace and other town centre activities/functions will require expansion of the town centre. This is recognised in the Trim Development Plan which proposes to create an expanded town centre to the west of the existing core area. It will require securing land and buildings through land acquisition and site assembly and this is being progressed by the Town Council. This will create the opportunities required to enhance Trim's retail offer and meet the needs of local people in a more sustainable way over the period of the Retail Strategy. In addition to the town centre, given the substantial growth of the town that is set to take place in the timescale of the Strategy then it is important that the convenience needs of its expanding residential areas are met locally. To further enhance Trim's role as a Sub-County Town, there should be scope for retail warehousing development.

5.78 In addition to greatly increasing the town's convenience floorspace, there is a need to enhance Trim's tourism offer and attraction. The priority should be within the town centre on land and buildings identified within the Town Renewal Scheme. This will be market driven but there is a need for the market to be made aware of the attraction and potential.

CORE RETAIL AREAS

5.79 All of the centres reviewed above were examined on the ground in respect of defining their Core Retail Areas. The definition of Core Retail Areas is a considerable move from the broad town centre uses zonings that have characterised development plans on the whole to date. It is thus important to clarify what Core Retail Areas are and why they have emerged as an instrument of policy and a requirement of the RPG. We address these under the following headings:

i What characteristics define Core Retail Areas?

ii Why is it important to define them?; and

iii How is this applied at the County settlement level?

Characteristics that define Core Retail Areas

5.80 The Core Retail Area of a centre is normally defined as the area including and immediate to the 'prime pitch'. This is the area that achieves the highest rentals, best yields, is highest in demand from retailer/operators/developers and investors, is overwhelmingly retail floorspace and has the highest footfall of shoppers. Outside of this area, there may be other important retail areas or freestanding shopping centres. In respect of the former, retail floorspace would be only one of the town centre uses. The mix of uses normally would be commercial, leisure service related or residential and such areas are termed secondary and tertiary retail areas of larger centres. The latter will only normally be a feature of larger centres. In fact, it is important to highlight that some smaller centres may not have what can be defined as a Core Retail Area as the centre may be fragmented and the retail market more locally driven.

Why is it important to define Core Retail Areas?

5.81 The RPG set down the Sequential Approach to the determination of retail applications. This essentially recognises the importance of sustaining the retail importance, vitality and viability of town centres. The emphasis in the RPG, and taken forward in the GDA Strategy, is on town centres, their redevelopment and expansion. Proposals for major retail schemes are required to take due cognisance of this as follows:

- In the first instance, the priority should be in locating new retail development within town centres. A site's inability to accommodate a pro-forma type development shall not be seen as lack of availability of a town centre site.
- If town centre locations are not readily available within a reasonable and realistic timescale then edge of centre sites should be looked to. In the RPG, these are defined as sites that are within 300 – 400 metres of the **Core Retail Area**.
- Only after the options for town centre and edge of centre are exhausted should out of centre locations and sites be considered.

Therefore, in order to be able to undertake the Sequential Approach, as required by the RPG, then the starting point is the definition of the Core Retail Area of main centres.

Application at a Settlement Level

5.82 The focus is on **main centres** as this is where large scale new retail development will be located, through the control applied by respecting the retail hierarchy. Additionally, from the health checks, and reflecting our comments above, it is clear that it is not always necessary or appropriate for Core Retail Areas to be defined for smaller centres in the hierarchy. The main centres are taken to be those that are at the highest levels in the GDA retail hierarchy, namely Level 2 and 3 centres. In respect of the County's main centres, there is recognition that there will require to be expansion of the town centres over the timescale of the Retail Strategy. To ensure that guidance is provided to the market as to what are the appropriate areas for expansion then these areas are identified with the Core Retail Areas in the final section of the Strategy.

SEQUENTIAL TEST

5.83 The principles of the Sequential Approach are summarised above. As part of the preparation of the Strategy, we reviewed the retail development potential of each centre against its criteria. Below, we detail the findings of our analysis for the different levels of the GDA hierarchy set out in Section 4 but only in respect of ***land availability*** and ***potential***.

Level 2 – County Town Centre

5.84 Navan is a Level 2 County Town Centre in the GDA hierarchy. In the early years of the Strategy, there is scope and potential for additional retail floorspace to be located in and around the core retail area. Taking a longer term view, and one that goes to and beyond 2011 – the timescale of the County Retail Strategy, it has to be recognised that Navan is set to become an even more major town in both the GDA retail hierarchy and national settlement hierarchy. Importantly, this is being driven by market demand and not national designations under the NSS. The existing town centre will be too small to accommodate the quantum and quality of retail floorspace that is needed to support what will be in essence a small city in the national context. It is important that the Retail Strategy and consequently the variations to the relevant development plans are forward looking. Land requires to be identified for an expansion of the town centre. Noting that it will be approaching the current size of the smallest of the regional capitals – Waterford, then it should also be recognised that large edge of centre and out of centre locations are sustainable without an impact on the health and vitality of major town/city centres providing that the town centre/city centre's offer and overall product is good and attractive to shoppers and visitors. Locations to accommodate edge of centre and out of centre shopping therefore require to be identified at this stage in the development of Navan's retail profile.

Level 3 –Sub-County Town Centres

5.85 Ashbourne, Kells and Trim are the County's Level 3 Town and Sub-County Towns. To date Ashbourne is the only one of the three, which has benefited from substantial town centre development. In the period of the Strategy, there are opportunities in all three town centres that will play an important role in enhancing their retail offer and importance. They are expanding towns and in the interests of proper planning there will be a need to meet convenience needs in their growing and new residential areas and this is consistent with the RPG. In respect of the heritage towns - Kells and Trim, the 'historical' character, and street and land pattern, may be such as would not allow for easy accommodation of certain retail developments (by reason of their scale or other) and consideration of this unique locational factor will be taken into account in the context of 'site selection' regarding the application of the sequential test. In addition given the characteristics of Ashbourne town centre, it would not be desirable to locate retail warehousing within the town centre and in accordance with the guidelines edge of centre and out of centre locations will required to be looked at here as well.

Tier 1 Level 4 – Small Town Centres

5.86 As a general rule, Small Town Centres in the County Retail Hierarchy are not centres where new large scale retail development is envisaged within the County although this requires to be balanced against the envisaged size that each of these centres will grow to over the timescale of the Strategy. Noting this, review of the scope and potential of all of the Tier 1 Level 4 centres indicates that needs and potential will on the whole be able to be met within the heart of each of the centres – Athboy, Bettystown, Duleek, Dunboyne, Dunshaughlin, Oldcastle and Ratoath. However, as all of the centres are set to grow over the period to 2011 then this position requires to be monitored.

Tier 2 Level 4 – Village Centres

5.87 Our review of all of the Tier 2 Level 4 centres in the County Retail Hierarchy indicates that all potential needs can be met within the village centres and thus will be in accord with the requirements of the sequential approach.

6. STRATEGIC RESPONSE – THE COUNTY RETAIL STRATEGY

6.1 Every Retail strategy must be clear as to its purpose and what it is intended to achieve. To ensure this, we have adopted a logical step by step framework which is summarised in Figure 6.1 below.

Figure 6.1
Framework for Strategy/Policy Formulation

AIMS

↓

STRATEGIC POLICY FRAMEWORK

↓

SPECIFIC POLICIES & PROPOSALS

AIMS

6.2 The principles underpinning the County Retail Strategy are set down by the GDA Strategy. In addition, it is important that the principles relate back to the objectives of both the **County Development Plan's Urban Settlement Structure** and those of **Le Cheile –** the County Development Board's Integrated Strategy – and that the Strategy is in compliance with these objectives. The framework for the County's Urban Settlement Structure objectives is set out in Table 4.2. It is inherent to the spatial framework for Meath as defined in the Integrated Strategy. The Urban Settlement Structure has been a key influence on the refinement of the GDA retail hierarchy so that it better reflects the characteristics of the County's centres. The Strategy is therefore complaint with the objectives of the County Development Plan and the Integrated Strategy.

6.3 Within this context, the aims of the County Retail Strategy set the framework for the Strategy's strategic policies and specific policies and proposals. They thus provide a clear definition of the purpose of the Strategy and what it is intended to achieve across the County over the periods firstly to 2006 and then to 2011. As such, they are:

- **Objective 1:** To sustain and improve the retail profile and competitiveness of County Meath within the retail economy of the GDA and beyond.

- **Objective 2:** To address leakage of retail expenditure from the County by providing the means to strengthen the range and quality of its retail offer.

- **Objective 3:** To ensure an equitable, efficient and sustainable spatial distribution of main centres across the County.

- **Objective 4:** To confirm a hierarchy which assists in defining the County's settlement structure and objectives and provides clear guidance on where major new retail floorspace would be acceptable.

- **Objective 5:** To ensure that the retail needs of the County's residents are met as fully as possible within Meath, taking due cognisance of the GDA Strategy hierarchy.

- **Objective 6:** To encourage and facilitate the preservation and enhancement of the retail role of both individual villages and village/settlement clusters around the County.

- **Objective 7:** To encourage and facilitate the re-use and regeneration of derelict land and buildings for retail uses, with due cognisance to the Sequential Approach.

- **Objective 8:** To promote and sustain the importance of retailing in the County's tourism economy.

- **Objective 9:** To encourage and facilitate innovation and diversification in the County's retail profile and offer.

- **Objective 10:** To provide the criteria for the assessment of retail development proposals.

STRATEGIC POLICY FRAMEWORK

6.4 To achieve the Strategy's objectives requires due cognisance to be taken of the strategic policy framework that underpins specific policies and proposals. This framework is set by:

i The retail hierarchy;

ii The core retail areas;

iii The sequential approach;

iv The spatial distribution of new retail development; and

v Consideration of need.

Retail Hierarchy

6.5 Following the review of the County Development Plan's Urban Settlement Structure and the GDA hierarchy set out in Section 4, it is recommended that the Retail Hierarchy in Table 6.1 is adopted. This slightly modifies the GDA hierarchy through introducing a differentiation between the Level 4 Small Towns and Village Centres and identifying the Drogheda and Kilcock environs given their roles within the County. Additionally, the recommended County Retail Hierarchy designates Ratoath as a Level 4 Tier 1 Town Centre as opposed to a Level 5 Local Centre which is the choice left to the Planning Authority by the GDA Strategy. The decision to adopt this approach reflects that Ratoath has the emerging characteristics of a Town Centre rather that a Local Centre. This is consistent with the approach adopted to the County Urban Settlement Structure.

Table 6.1
Meath County Retail Planning Hierarchy

LEVEL 2	**County Town Centres**
	Navan
LEVEL 3	**Sub-County Town Centres***
	Ashbourne, Kells and Trim (noting Drogheda and Kilcock Environs)*
LEVEL 4	**Local Centres – Small Towns and Villages**
	Tier 1 Small Town Centres: Athboy, Bettystown, Duleek, Dunboyne, Dunshaughlin, Ratoath and Oldcastle ***Tier 2 Village Centres*** Ballivor, Clonee, Enfield, Laytown, Nobber and Slane
LEVEL 5	Smaller Village Centres/Crossroads

Note – definitions are set out in Section 4.
* Drogheda is a Level 1 Tier 3 centre in the national retail hierarchy and Kilcock is a Level 3 centre in the GDA hierarchy. These designations are specific to the town centres and their roles but their environs will also be areas for retail development. Both are noted within the County Retail Hierarchy as parts of their environs are within the County's boundaries.

Core Retail Areas

6.6 The Core Retail Areas and identification of potential for expansion for each of the main centres in the County are illustrated in Figures 6.2 to 6.5. Below, we broadly summarise the definitions at a settlement level:

i **Ashbourne** – includes the majority of lands zoned to accommodate town centre uses on the east and west side of Fredrick Street stretching from the Ashbourne Shopping Centre southwards and incorporating the New Ashbourne Town Centre;

ii **Kells** – includes the area zoned for town centre uses surrounding Castle Street, Market Street, John Street, Cross Street, New Market Street, Church Street and Farrell Street. The Kells Shopping Centre located on the north west of Kells town centre on the south side of the Cavan Road is also identified as part of the core retail area. The core area also includes the area indicated for town centre expansion to the west of Farrell Street and Bective Street;

iii **Navan** – Includes the town centre bounded by the N3 to the east and north east (including St Ultan's Tce.), Abbey Road to the north, properties to the west of Railway Street and Circular Road to the south;

iv **Trim** – Includes the area reserved for town centre uses surrounding Market Street, Emmet Street and Castle Street (north and south of the Boyne). It also includes the area indicated for town centre expansion west of the existing town centre.

Sequential Approach

6.7 In meeting the aims of the Strategy, policies and proposals in respect of the location of retail development must be in accordance with the principles set by the sequential approach in the RPG. The sequential approach in summary defines that:

- The preferred location for new retail development, where practicable and viable, is within a town centre (or village centre).

- Where it is not possible to provide the form and scale of development that is required on a site within a town centre then consideration can be given to a site on the edge of the town centre so as to encourage the possibility of one journey serving several purposes. An edge of centre site is taken to be one that is unlikely to be more than 300 - 400 metres from the edge of the prime shopping area, and less in smaller settlements. The distance considered to be convenient will however vary according to local circumstances.

- Only after having assessed the size, availability, accessibility and feasibility of developing sites and premises, firstly within a town centre and secondly on the edge of a town centre, should alternative out of centre sites be considered where it can be demonstrated that there are no town centre or edge of centre sites which are suitable, viable and available.

6.8 In formulating specific policies and proposals, it is recognised that in general retail warehouses do not fit easily in to town centres given their size requirements and the need for good car parking facilities and ease of servicing. As such, in some instances it may be possible to locate retail warehouse groups on the edge of town centres.

Spatial Distribution of New Retail Development

6.9 The County Retail Strategy, in accordance with the RPG, provides the strategic policy framework for the spatial distribution for new retail development. The emphasis is on strategic guidance on the location and scale of major retail development. The Strategy does not seek to inhibit small scale retail development in centres around the County, particularly in smaller centres. It should be taken to be implicit in the aims of the Strategy that such developments should be encouraged and facilitated to enhance the sustainability, vitality and viability of smaller centres, including smaller main centres in the Retail Hierarchy. The hierarchy sets the framework for the spatial distribution of the quantum of convenience and comparison floorspace. The following provides guidance on how the Retail Strategy defines the distribution of strategic and non-strategic retail floorspace within the Retail Hierarchy. This guidance is also provided in the GDA Strategy:

- **Level 1:** major convenience and comparison
- **Level 2:** major convenience and comparison
- **Level 3:** predominantly additional convenience but not excluding comparison
- **Level 4:** convenience and tourism related comparison.

6.10 Additionally, the Strategy recognises the need to ensure that local needs, primarily convenience shopping and local services, are met in an equitable, efficient and sustainable way in major existing or new residential areas in and around main settlements through the designation of locations for District or Neighbourhood Centres in development plans.

Need

6.11 The County Retail Hierarchy recognises the need to have a good spatial distribution of centres and floorspace. This is particularly true in respect of convenience floorspace and the aim of reducing the need to travel to meet these shopping needs. The designation of Navan as one of the Level 2 County Town Centres in the GDA also responds to this with regards to higher order comparison floorspace.

6.12 In order to sustain and improve the County's competitive position, then the Strategy must provide the policies and proposals that facilitate this. At present, retention and attraction of convenience expenditure is on par with the majority of other counties outside of Dublin City in the GDA. There are relatively low levels of convenience expenditure inflow and outflow which is what should characterise convenience shopping patterns. In contrast, the County is experiencing relatively high levels of comparison expenditure leakage although this is below that of the majority of the other counties within the GDA with only Wicklow faring better. This can be attributed largely to the relative distance of Navan from the City Centre and the major shopping centres around the M50. It also explains why the County is attracting higher levels of comparison expenditure than the other Hinterland Area counties within the GDA. However, this must be appreciated in the light of the fact that over the period since the baseline for the GDA Strategy was complied there have been new and emerging developments that could provide further alternatives to the County's main centres and specifically we would highlight The Pavilion Shopping Centre in Swords and Lakepoint Retail Park at Mullingar. Counterbalancing this to a degree is the fact that there has also been the opening of Ashbourne Town Centre, which will also have had an impact on shopping patterns. This reflects that retailing is a competitive and dynamic industry, particularly but not exclusively in the GDA. Expenditure will continue to leak to Dublin City Centre, Blanchardstown, Liffey Valley and Swords, both The Pavilion Shopping Centre and the town's retail warehousing parks. Additionally, there is likely to be enhanced leakage to Mullingar due to the attraction of the Lakepoint Retail Park and the deficiencies in the quality and quantum of the County's retail warehousing floorspace.

6.13 Quantitatively, at the County level, need is identified in broad assessment of the requirement for additional retail floorspace over the timescale of the County Retail Strategy. The assessment indicates that in this period there is the need to enhance existing provision by the order of 1.5 and 2.7 times of existing retail floorspace for convenience and comparison floorspace respectively. Additionally, it is recognised that delivery of the quantum of floorspace is not the baseline but the quality if the County is to sustain its role and competitiveness. As part of this, analysis and evaluation indicates that there is a specific requirement to address this in respect of meeting needs in expanding residential areas and the deficiencies in the County's retail warehousing offer.

SPECIFIC POLICIES AND PROPOSALS

6.14 The specific policies and proposals of the County Retail Strategy are designed to facilitate achievement of the aims of the Strategy. They are formulated to ensure:

- Existing or emerging issues in the County's retail profile and that of its centres have the policy framework to be addressed

- The County has the policy framework to ensure strategic and local convenience and comparison shopping needs are met and the competitiveness of the County's main centres is enhanced

- The expenditure capacity potential for additional floorspace is harnessed over the timescale of the Strategy (Table 3.6).

6.15 The policies and proposals are grouped under the following three categories:

i. Strategic Policies:	Relate to the spatial distribution of centres, specific centres, their role in the hierarchy and the strategic aims of the strategy;
ii. General Policies:	Set principles that should be applied across the hierarchy; and
iii. Framework for the Assessment of Retail Developments:	Sets out the assessment criteria that will be used in the appraisal of future retail proposals.

Strategic Policies

6.16 Table 6.2 identifies the strategic policies that underpin the Strategy.

Table 6.2 Summary of Strategic Policies	
Policy Reference	**Policy**
Policy RS1: County Town Centre – Navan	*It is the policy of the Council to promote and encourage major enhancement and expansion of retail floorspace and town centre functions in Navan to sustain its competitiveness and importance as a County Town Centre in the GDA*
Policy RS2: Sub-County Town Centre – Ashbourne	*It is the policy of the Council to promote and encourage continued enhancement and expansion of retail floorspace and other commercial development in Ashbourne to encourage its development as a self-sustaining key centre in the south of the County*
Policy RS3: Sub-County Town Centre – Kells and Trim	*It is the policy of the Council to promote and encourage major enhancement and expansion of town centre functions to sustain the competitiveness and importance of Trim and Kells as Sub-County Town Centres and also to ensure that their unique heritage becomes integral to the offer and attraction of both towns*
Policy RS4: Drogheda and Kilcock Environs	*It is the policy of the Council to work with Louth and Kildare County Councils and Drogheda Borough Council to ensure that the retail needs of the populations in the expanding environs of Drogheda and Kilcock that are located within County Meath are met in a way that is efficient, equitable and sustainable*
Policy RS5: Small Town Centres – Tier 1 Level 4	*It is the policy of the Council to facilitate and encourage the provision of shops and services that consolidate the strength of Tier 1 Level 4 Small Town Centres to meet the needs of the existing and expanding population*
Policy RS6: VillageCentres – Tier 2 Level 4	*It is the policy of the Council to facilitate the local provision of shops and services in Tier 2 Level 4 Village Centres to meet the needs of existing and expanding populations*

Policy RS1: County Town Centre - Navan

It is the policy of the Council to promote and encourage major enhancement and expansion of retail floorspace and town centre functions in Navan to sustain its competitiveness and importance as a County Town Centre in the GDA

6.17 **Justification:** Navan’s importance and role as a retail centre is recognised at the national and regional levels in its designation as a Tier 3 centre in the national retail hierarchy and one of the major centres below Dublin City Centre in the GDA retail hierarchy. This importance is translated at the County level with its designation as a Regional Centre in the County Urban Settlement Structure. In the regional and County contexts, Navan’s role is broader than a key focus for retail activity and investment. It is a Primary Growth Centre which is set to expand significantly over the period to 2016. Within the GDA Retail Strategy, Navan’s role and importance is confirmed as it is identified as the centre in the County where the majority of additional retail floorspace should be located in the period to 2011 – the timescale of both the GDA and County Retail Strategies.

6.18 Navan is currently the only major retail centre within Meath, as illustrated by the fact that nearly 50% of the County's retail floorspace is located within and around the town centre. The strength and importance of Navan within the County is fundamental to the competiveness of Meath regionally and against neighbouring counties outside of the GDA. It is also consistent with the thrust of the recommendations of the Draft Framework Plan for Navan which promotes that the town should be increasingly more self-sustaining. The importance of this is given further weight with the NSS designation of comparable centres in the national retail hierarchy as gateways and hubs with priority for decentralisation of Government departments and National Development Plan (NDP) resources/investment. To date, Navan and the County have been performing strongly against these competitors given that Meath has had the highest population growth rate of all counties in the State. Based on current trends, this is set to continue accepting that these national level priorities have been set.

6.19 The County Retail Strategy requires to provide the policy framework to sustain and enhance the role and competiveness of Navan at the national and regional levels. To achieve this, consistent with the GDA Strategy, over the timescale of the County Retail Strategy, Navan should be the focus of the majority of large scale retail development in the County. To ensure that scope is afforded to strengthening the role and importance of the County's other main centres, specifically the Sub-County Town Centres in respect of their comparison offer, then a lesser quantum than the 70% of the indicative floorspace potential that was identified in the GDA Strategy has been adopted in the Retail Strategy. This refinement is wholly consistent with the guidance provided by the GDA Strategy. Scope and potential will be determined by the capacity and retail impact assessments for individual proposals reflecting that catchment areas for individual schemes differ from administrative boundaries.

6.20 In the first instance, the objective must be to achieve consolidation/enhancement of retail floorspace within the town centre and specifically in respect of comparison floorspace that meets the needs of national and international multiples. In parallel, the town centre environment requires to be considerably improved, local convenience needs require to be better met within the three sectors of the town's suburbs as identified in the Draft Framework Plan and the town and County's retail warehousing offer should be significantly enhanced. There is scope for three medium – large sized supermarkets in the three spatial sectors respectively and a modern retail warehousing park of up to 15,000m^2(net) over the period to 2011. The retail potential of the town should be forward looking and thus it is important that the opportunities for future expansion are protected to enable the sequential development from the town centre of additional retail floorspace and other town centre activities over the timescale of the Strategy and beyond.

6.21 **Actions:** to achieve the quantum and quality that befits Navan's place in the national and GDA retail hierarchies, expansion and enhancement of the town's retail offer requires to be considered at the strategic level and be in accord with the principles set down by the Draft Framework Plan for the town. This noted, for Navan to sustain and improve its competitiveness in the national and regional retail hierarchies then the following actions are required:

- Preparation of a vision/masterplan for the town centre that sits in the context of the wider potential expansion areas(s) that should form the next phases of development of the town centre. This should provide a context/brief with appropriate visual interpretation, which can be used as a prospectus that can be taken to the market. The prospectus should include details in respect of roads and infrastructure programmes and timescales. It will require to be supported with other contextual details. These should include a land/buildings inventory, market assessment and the baseline that underpins the County Retail Strategy. Depending on the County and Town Councils' land ownerships, the range of delivery mechanisms can be specified which may include joint ventures or Public Private Partnerships.

- Ensuring that lands adjacent to and extending from the town centre are protected from development that would compromise longer term town centre expansion proposals being realised.

- Dialogue being established with stakeholders within the town centre in order that the vision and potential is understood and there is a partnership approach to maximising the town's potential.

- Identification of sites and locations for a large scale retail warehouse park.

- Identification of locations within the three designated Draft Framework Plan 'sectors' as locations for major convenience retail floorspace.

- Investigation of the feasibility and deliverability of the potential of the riverside area as a cultural quarter for the town.

- Commissioning of a heritage/tourism interpretation strategy that harnesses the asset and highlights the issues in the deliverability of the product.

Policy RS2: Sub-County Town Centre – Ashbourne

It is the policy of the Council to promote and encourage continued enhancement and expansion of retail floorspace and other commercial development in Ashbourne to encourage its development as a self-sustaining key centre in the south of the County

6.22 **Justification:** Ashbourne is a Level 3 Sub-County Town in the GDA and emerging as the second largest settlement and retail centre in the County. This is recognised in its designation as a Major Urban Centre in the County Development Plan Urban Settlement Structure and the designation as a Sub-County Town being confirmed in the County Retail Hierarchy. Below Navan, with Kells and Trim, it is one of the three main centres in Meath. Whilst it lacks the heritage, environment and attraction of the other two Sub-County Centres, it sits closest to the GDA Metropolitan Area and as such experiences considerable development pressures. This is set to continue and further commercial/employment floorspace needs to be encouraged to ensure that Ashbourne develops from an expanding residential commuter settlement for the City into a more self sustaining community. To achieve this will require new convenience, comparison and retail warehousing floorspace and enhancement of the range of town centre services, particularly commercial leisure. This requires to be set in a very much enhanced townscape. Reflecting its importance in the south of the County and the need to stem the outflow of expenditure to the Metropolitan Area, Ashbourne is identified as the key centre after Navan where there should be a quantum of additional retail floorspace over the timescale of the Retail Strategy. As such, there is scope for an additional superstore/large supermarket and the town's comparison floorspace to increase by the order of 10,000m^2(net) of which a proportion should be retail warehousing in order that more of this category of retail expenditure is retained in the south of the County. In addition, the convenience needs of the town's expanding residential areas should be met locally in Neighbourhood and District Centres, as appropriate. To provide the road capacity for this scale of development in the town centre and residential areas, the traffic congestion issues that prevail in the town will require to be addressed through the implementation of the Ashbourne Bypass and the series of proposed distributor roads and improvements to public transport provision.

6.23 The needs of Ashbourne's expanding residential areas will require to be given due consideration in meeting convenience needs locally. These should not be of a scale that would threaten the development and enhancement of the town centre and be consistent with other Council policies such as those set out in the Killegland Action Plan.

6.24 **Actions:** to enhance the attraction and sustainability of Ashbourne as the main centre in the south of the County, the following actions are required:

- An urban design framework study is required that will enhance the character of the town centre and create places and spaces of quality and attraction.

- The scope for expansion of Ashbourne Town Centre Shopping Centre should be examined, with particular attention to redressing the constraints of the current alignment of adjacent road proposals.

- There should be discussions and liaison with the owners of the Dardis & Dunn site on the future proposals and potential of the site as an appropriate location for further extension of the town centre.

- Locations need to be identified within major new residential areas for Neighbourhood and District Centres to enable convenience needs to be better met locally and thus reduce the need to travel to the town centre for the majority of shopping needs.

- Edge of and out of centre sites should be identified and evaluated as potential locations for the town's retail warehousing park.

Policy RS3: Sub-County Town Centres – Kells and Trim

It is the policy of the Council to promote and encourage major enhancement and expansion of town centre functions to sustain the competitiveness and importance of Trim and Kells as Sub-County Town Centres and also to ensure that their unique heritage becomes integral to the offer and attraction of both towns

6.25 **Justification:** Kells and Trim are Level 3 Sub-County Town Centres in the GDA retail hierarchy. Their importance in the County is recognised in their designations as Major Urban Centres in the County Development Plan Urban Settlement Structure and as such they are set to significantly grow in population over the period to 2011. The regional and County importance of both towns is reinforced in their designation as Sub-County Town Centres within the County Retail Hierarchy. Based on the GDA Strategy floorspace surveys and developments since that date, Kells and Trim are the fifth and third largest retail centres in Meath respectively. They are predominantly comparison centres with a good number of quality outlets that add to their attraction. However, comparison with centres of equivalent size and importance in other counties reveals that there is an under provision of retail floorspace and in particular main food shop floorspace. The two towns are thus under-performing for their level in the GDA against other centres at the same level in the hierarchy. They should be more self-sustaining centres with local people only needing to travel to meet their higher order shopping needs. This objective will become more fundamental as Kells and Trim grow in population.

6.26 Additional convenience floorspace is required if Kells and Trim are to play an enhanced sub regional/county role in the shopping patterns of the County. Both need larger format supermarket floorspace that better serves main food shopping needs. It is envisaged that over the timescale of the Strategy, further expansion of comparison floorspace will be linked to any supermarket development or through re-use of existing lands and buildings. The priority must be to secure new convenience floorspace within Kells and Trim town centres to enable consolidation and improvement of the range and offer of the two town centres. This need is recognised in the Kells and Trim Development Plans and sites have been identified for this purpose in their respective development plans. The process of land assembly is in place to ensure that the opportunities and potential are delivered in the early years of the Strategy and the supporting road and other infrastructure requirements have been identified in the respective development plans. Additionally whilst the priority is the town centre, it is acknowledged that the needs of both towns' expanding residential areas plus the potential for delivering retail warehousing floorspace cannot be met in either town centre. Development plan zonings will require to respond to these needs if the role and profile of Kells and Trim as Sub-County Centres are to achieve the objectives of the County Retail Strategy.

6.27 Both Kells and Trim are nationally and internationally recognised centres of heritage importance. They are also attractive towns to visit and have a quality range of supporting tourism infrastructure serving both visitors and local people. There is a need to better harness the asset to the benefit of the town centres and their attraction through sensitive and appropriate interpretation and marketing. This will increase their tourism attraction and stimulate further investment in their fabric and offer.

6.28 **Actions:** over the period of the County Retail Strategy, it is important that Kells and Trim develop further their role and importance as Sub-County Centres in the shopping patterns of their catchment areas. This will require the following actions:

- Both Town Councils need to continue progress with regards to land acquisition and site assembly in order that the opportunities for town centre development are secured.

- The County and Town Councils need to look at the emerging needs of existing and expanding residential areas specifically with regards to convenience shopping and ensure that the correct land use zonings are in place.

- Locations require to be identified and promoted for retail warehousing floorspace.

- Progress should be pursued as a priority on all road proposals required to untap the potential and attraction of sites within Kells and Trim town centres.

- There needs to be examination of the mechanisms that could assist the delivery of key town centre sites. This should include marketing strategies, the potential of Public Private Partnerships which is that which has been adopted in other centres and direct market testing of developers and operators.

- The preparation of heritage and interpretation strategies that embrace signage, linkages and interpretation.

Policy RS4: Drogheda and Kilcock Environs

It is the policy of the Council to work with Louth and Kildare County Councils and Drogheda and Kilcock Town Councils to ensure that the retail needs of the populations in the expanding environs of Drogheda and Kilcock that are located within County Meath are met in a way that is efficient, equitable and sustainable

6.29 **Justification:** both Drogheda and Kilcock are important retail centres within the national and GDA hierarchies respectively. The retail planning of these centres and their environs is determined by their respective County and Town Councils plus Meath County Council for the parts of the two environs that are within the County's boundaries. To achieve an integrated approach, it is thus important that the policies and proposals for the environs that are within Meath are compatible with those of the adjacent Local Planning Authorities. This is particularly important given that the environs of each are areas which are or will significantly expand in population over the timescale of the Meath County Retail Strategy. It is important that in particular the convenience and other basic service needs of these new or emerging communities are met locally. Additionally, where the retail needs and potential of either Drogheda or Kilcock cannot be met within town centre or edge of centre locations then, consistent with the RPG, the environs should be looked at to assist in meeting these needs.

6.30 **Actions:** to achieve an integrated and sustainable approach to retail planning in County Meath, Drogheda and Kilcock environs requires the following actions:

- Identification of existing and growing residential areas and determination of the level of provision that is appropriate to the area and location within a town and environs context. For example the development of a neighbourhood / small district centre at Colpe Cross in south Drogheda would be appropriate to meet the needs of the population there.

- Ensuring that the appropriate land use zonings are in place to accommodate retail floorspace and other community needs.

- To liaise with neighbouring councils within the towns and their environs in respect of other retail potential within the Meath environs of either town.

Policy RS5: Small Town Centres – Tier 1 Level 4 Centres

It is the policy of the Council to facilitate and encourage the provision of shops and services that consolidate the strength of Tier 1 Level 4 Small Town Centres to meet the needs of the existing and expanding population

6.31 **Justification:** Meath is predominantly a rural county with local needs being met to differing degrees through a dispersed network of local centres. The GDA Strategy identified these local centres to be Level 4 in the Hinterland Area hierarchy and differentiated between **Small Town** and **Village Centres**. Respecting the importance of defining a hierarchy that best reflects the characteristics of different counties and their centres, the GDA Strategy was explicit in leaving the designation of centres within the different levels of the hierarchy to Local Planning Authorities. In the preparation of the County Retail Strategy, some fourteen centres were identified as being within this level of the GDA hierarchy. Each of these centres was reviewed against a set of factors. These included population size, amount and diversity of retail floorspace, level in the County Urban Settlement Structure, the objectives of the

County Development Board Integrated Strategy and geographical location. From this review a two tier Level 4 emerged with Tier 1 being designated as Small Town Centres and Tier 2 being Village Centres.

6.32 Within the County the Level 4 Tier 1 Small Town Centres are **Athboy, Bettystown, Duleek, Dunboyne, Dunshaughlin, Oldcastle** and **Ratoath.** With the exception of Bettystown, all of the centres are Major Service Centres within the County Development Plan Urban Settlement Structure. In terms of retail floorspace, they had greater amounts than the other Tier 4 centres in the County and quantitatively they form the next level under the County's main centres in respect of quantum of provision. All are identified in the County Development Plan as centres where there will be significant increases in population relative to baseline populations and this has been largely confirmed in the preliminary results of the 2002 Census of Population. However, over the period of the Retail Strategy, differentiations within this sub tier of the County Retail Hierarchy will emerge. Bettystown, Dunboyne and Dunshaughlin will become sizeable towns in the national and County contexts with populations of 10,000 and more. It will be important that the hierarchy is adjusted to reflect this and this position should be monitored. The growth and needs of these expanded towns will require to be addressed and planned particularly in respect of convenience floorspace to ensure that these are appropriately responded to in respect of the distribution of additional retail floorspace. This is equally true of all centres within this sub tier of the hierarchy and below is summarised the prospects and potential of each:

i **Athboy:** set against other centres at this level in the County Retail Hierarchy is not identified as a strategic growth centre. Over the period to 2011. population is projected to increase to some 3,000. In the timescale of the Retail Strategy, given its relative proximity to Navan and projected population increase, then it is unlikely that it will attract or sustain any significant level of new retail floorspace. It is important that convenience shopping continues to be focused within the town centre and encouragement is given to further enhancing and developing the town's profile quality fashion offer;

ii **Bettystown:** plays a strategic role in the County Urban Settlement Structure in view of its proximity to Drogheda and its location in the north east of the County. It is projected that the town's population will increase to 11,500 by 2011 and thus will grow to a centre of increasingly comparable size to both Kells and Trim. Based on existing provision and the needs of the growing population, over the timescale of the Strategy there is a need to considerably enhance convenience retail floorspace in the town with the introduction of a medium to large sized supermarket that will greater meet the main food shopping requirements of local people within the Bettystown-Laytown-Mornington cluster. Additionally, there is a need to harness the asset and potential of its coastal location through encouraging investment in supporting tourism infrastructure and enhancing the general environment of the town;

iii **Duleek:** whilst the town is not identified as a strategic growth centre in the County, it is a Major Urban Centre in the County Urban Settlement Structure and its population should increase to some 4,000 by 2011. This will require enhancement of the town's convenience floorspace but this unlikely to be large scale in view of its proximity to the higher order centre of Drogheda;

iv **Dunboyne:** is identified as a strategic growth centre in the County with its population set to increase to some 10,000 by 2011. The preliminary results of the 2002 Census indicate that this is likely to be surpassed given the current population levels that prevail. This is predominantly due to its proximity and good accessibility to the GDA Metropolitan Area. For its current size, Dunboyne has a limited retail offer and this requires to be addressed prior to any consideration of meeting the needs of the future population. This has been acknowledged through the County Council setting a brief for the urban extension of the centre. Traffic issues are however a constraint to achieving this prior to 2006. It will therefore be a longer term project and in the interim there is a requirement to address the needs of expanding residential areas with a strategic network of Neighbourhood and District Centres anchored by convenience stores;

v **Dunshaughlin:** is the third of the strategic growth centres at this level in the County Retail Hierarchy. By 2011, the town's population is projected to increase to 10,000 which as has been noted is large in a national and County context. This represents a doubling of present day levels and is largely fuelled by its location on the N3 National Primary Route which provides relative ease of access to Dublin City, the employment areas around the M50 and Navan. The attraction of the town will be further enhanced with the reinstatement of the Navan – Dublin rail link. For its population size and potential, Dunshaughlin has a limited retail offer, particularly in respect of convenience floorspace. This requires to be redressed in the early years of the Strategy through an increase in the quantum and quality of the offer if the town is to become a more self sustaining centre. Sites have been identified to achieve this and there is market interest in helping make it happen. It is important that the Council works in conjunction with developer/operator interests to assist delivery of this;

vi **Oldcastle:** is a small centre in the context of the other centres at this level in the County Retail Hierarchy and is not identified as one of Meath's strategic growth centres although its population is set to expand to 2000 by 2011. It is however performing at this level in respect of the quantum and range of retail floorspace. Whilst it is one of the larger retail centres in Meath, it is not one where it is envisaged there will be any large scale additional floorspace at least in the early years of the Retail Strategy although market interest should be encouraged. The town provides a wealth of goods and services to its surrounding rural catchment area and it is important that over the timescale of the Strategy and beyond that this is sustained and improved particularly in respect of convenience floorspace; and

vii **Ratoath:** is the smallest retail centre at this level in the County Retail Hierarchy and is designated as a Local Service Centre in the County Urban

Settlement Structure. It is however set to witness a fourfold increase in population to 4,500 by 2011. This significant increase in the population will require enhancement of convenience floorspace over the period of the Retail Strategy. There is a need to greatly enhance the Ratoath's convenience floorspace. The priority should be achieving this within the town centre in order that the high vacancy levels that prevail are addressed. There will be pressure for retail development within the expanding and new residential areas and it is preferable, in the interests of growing and improving the town centre, that this should be aimed at meeting only local neighbourhood needs.

6.33 **Actions:** for the needs and potential of the Tier 1 Level 4 Small Town Centres to be met then there requires to be a series of actions. These are:

- There needs to be greater awareness in the market, specifically the convenience sector of the significant size and potential of the majority of the County's small town centres. This will be achieved by the County Retail Strategy but a more proactive approach by the Council through dialogue with operators may reap benefits earlier.

- Locations need to be identified for Neighbourhood and District Centres in expanding new residential areas.

Policy RS6: Village Centres – Tier 2 Level 4 Centres

It is the policy of the Council to facilitate the local provision of shops and services in Tier 2 Level 4 Village Centres to meet the needs of existing and expanding populations

6.34 **Justification:** village centres play an important part in rural community life in the County and around the remainder of the country. In general, they serve smaller catchment areas and have a more limited range and quality of retail floorspace than Small Town Centres. The designated Tier 2 Level 4 Village Centres in the County Retail Hierarchy are **Ballivor, Clonee, Duleek, Enfield, Nobber, Laytown** and **Slane.** With the exception of Laytown, all of these centres are designated as Major Service Centres in the County Development Plan Urban Settlement Structure. The retail offer within each of the centres is limited and as such the majority of retail needs are met in higher order centres in the County Retail Hierarchy. All of these centres would therefore benefit from an enhancement of their retail floorspace and specifically convenience floorspace in order that the daily needs of the villages and their catchments are better met. It is envisaged that in all of the centres, except Enfield, there is unlikely to be any sizeable addition to the retail offer of the Tier 2 Level 4 Village Centres. It is recognised that Enfield will become an important centre in the County in the long term. As such, it is a centre with the greatest potential to grow over the timescale of the Retail Strategy and this will require larger format convenience floorspace.

6.35 **Actions:** the following actions are required:

- The Council should positively respond to and encourage applications for small retail developments in designated Village Centres.
- There is a need to enhance the market awareness of the potential of Enfield and monitor the growth of the village and its level in the hierarchy.
- The improvement of Village Centres cannot be achieved by the Council alone and there is a need for a partnership approach between the Council, local businesses and the community.

General Policies

6.36 Table 6.3 presents the general policies of the County Retail Strategy.

Table 6.3 Summary of General Policies	
Policy Reference	**Policy**
Policy RS7: Corner Shops and Smaller Villages/Crossroads	*It is the policy of the Council to retain, encourage and facilitate the retail role of corner shops and small villages around the County*
Policy RS8: Enhancement of Towns and Villages	*It is the policy of the Council to encourage and facilitate the enhancement and environmental improvement of the County's towns and villages*
Policy RS9: New District and Neighbourhood Centres	*It is the policy of the Council to encourage and facilitate the development of new District and Neighbourhood Centres to meet the needs of new and growing centres of population*
Policy RS10: Re-Use and Regeneration of Derelict Land and Buildings	*It is the policy of the Council to encourage and facilitate the re-use and regeneration of derelict land and buildings*
Policy RS911: Retailing in Tourism and Leisure	*It is the policy of the Council to encourage and facilitate the development of retailing within the tourism and leisure sectors*
Policy RS12: Innovation in the County's Retail Offer	*It is the policy of the Council to encourage and facilitate innovation in the County's retail offer and attraction*

RS7: Corner Shops and Smaller Villages/Crossroads

It is the policy of the Council to retain, encourage and facilitate the retail role of corner shops and small villages around the County

6.37 **Justification:** consistent with the RPG and GDA Strategy, as Meath is a rural county then meeting needs locally is an important policy in the County Retail Strategy. Small Village Centres and local freestanding stores are an integral component of the life in the country serving needs wider than shopping. It is a sustainable objective to encourage and facilitate preservation of retail and other services in small communities.

Policy RS8: Enhancement of Towns and Villages

It is the policy of the Council to encourage and facilitate the enhancement and environmental improvement of the County's towns and villages.

6.38 **Justification:** the environment of the County's centres is equally important to its retail offer in attracting trade and achieving vitality and viability. This is recognised by the Council and other bodies' investment in the fabric and public realm of many of the County's centres in recent years. Urban renewal and environmental improvement is a continuous requirement if the attraction of the County's centres is to be maintained and mechanisms require to be put in place to ensure that performance is monitored. Enhancement can also be achieved through ensuring quality of design in all new retail development and this should be a key criteria in the assessment proposals.

Policy RS9: New District and Neighbourhood Centres

It is the policy of the Council to encourage and facilitate the development of new District and Neighbourhood Centres to meet the needs of new and growing centres of population

6.39 **Justification:** the significant growth of population that has occurred in the County has been facilitated through the construction of a number of large new housing developments which tend to be on the fringe/environs of existing towns and villages. In some cases, the existing floorspace in these towns/villages can no longer meet the needs of the increased local population. As a result, provision should be made for new district or neighbourhood centres where large-scale residential developments are planned to take place and the existing retail provision will not be sufficient to cater for the larger population. This is consistent with advice in the RPG and the GDA Strategy. These centres will predominantly comprise convenience floorspace and will be anchored by supermarkets or superstores, subject to the assessment criteria set down by the Strategy being met.

Policy RS10: Re-Use and Regeneration of Derelict Land and Buildings

It is the policy of the Council to encourage and facilitate the re-use and regeneration of derelict land and buildings in both main and smaller centres

6.40 **Justification:** re-use and regeneration of derelict/obsolete land and buildings is a sustainable objective. In the context of the County, it is additionally important, as it will help achieve preservation of the character and quality of centres, particularly in terms of vernacular/historical architecture, scale, height, density and massing. The potential for the re-use and regeneration of derelict buildings and brownfield sites in town centres and in edge of centre locations should be considered in the formulation of development proposals. Only when suitable, available and viable land and buildings cannot be found should alternative new build options be permitted.

Policy RS11: Retailing in Tourism and Leisure

It is the policy of the Council to encourage and facilitate the development of retailing within the tourism and leisure sectors.

6.41 **Justification:** in a large number of towns and centres in the County tourism related retailing is a key economic driver in respect of the vitality, viability and sustainability of other retail floorspace and services. It may not have matured in other centres and the Strategy does not seek to inhibit this, rather it seeks to encourage such developments and initiatives. As such, it is thus important tourism related retail developments and initiatives that will contribute to the health and wealth of the County's towns are allowed, subject to meeting the tests of the sequential approach and the Council's assessment criteria for retail developments.

Policy RS12: Innovation in the County's Retail Offer

It is the policy of the Council to encourage and facilitate innovation in the County's retail offer and attraction

6.42 **Justification:** this policy is consistent with the guidance in the RPG. The retail industry and market has been proven to be one of the most dynamic and competitive economic sectors across Europe. As the country's retail market matures, lessons from Europe indicate that this will further increase at a county and centre level. Encouraging and facilitating innovation, be that in trading format, location or product, will assist the County both sustain and increase its competitiveness and attraction.

FRAMEWORK FOR THE ASSESSMENT OF RETAIL DEVELOPMENTS

6.43 All applications for retail developments must comply with the floorspace caps (unless of strategic importance to the county) set out in paragraphs 50 and 80 – 83 of the Retail Planning, Guidelines for Planning Authorities (2000) unless otherwise amended by Government, by way of revised guidelines or directive. Paragraph 50 refers to large convenience stores where a floorspace cap of 3,500 sq. m in the GDA is imposed, paragraphs 80-83 refers to non-food retail parks. Consistent with the GDA Strategy, all significant retail development should be assessed against a range of criteria. What is significant will vary around the County. As a general rule, it is recommended to be 1,000m^2 (gross) of convenience development and 2,000m^2 (gross) of comparison development. The criteria to be considered in the assessment of significant applications will include:

i. Testing the proposal against the sequential approach and that other options have been considered;

ii. Testing the proposal against the 'health checks' criteria as set out in the Retail Planning, Guidelines for Planning Authorities (2000).

iii. The impact on town and village centres, including cumulative impact;

iv. The baseline information and capacity/impact assessment is fit for purpose and transparent;

v. There is demonstrable need for development;

vi. The relationship of the application to any development plan allocation;

vii. Its contribution to town/village/centre improvement;

viii. Its contribution to site and/or area regeneration;

ix. The quality of access by all modes of transport and by foot and bicycle;

x. Its role in improving the competitiveness of the County and sub-areas of the County;

xi. Its role in sustaining rural communities;

xii. The extent to which it is relevant to consider the imposition of restrictions on the range of goods permitted for sale; and

xiii. Any other development plan allocations.

6.44 If the retail proposal, whether significant or not, accords with development plan policies and proposals in all material respects it should expect to meet with approval. In accordance with the RPG, in such instances, it should not be necessary for the applicant to provide additional supporting background studies. However, the onus is on an applicant to demonstrate convincingly that the proposal does comply closely with the development plan. Where there is doubt on any aspect of a planning application local authorities should require a detailed justification related to the matter that is questionable.

MONITORING

6.45 In order to assure that the GDA Strategy remains up-to-date and relevant, it has been agreed that a review of the Regional Retail Planning Strategy takes place in Autumn 2003. This will follow the SPG review programmed for Spring 2003 and which is currently being established. The review will up-date the SPG to incorporate the adopted 2002 Census of Population results and the forecasts and objectives set by the NSS. The up-dating of the GDA Strategy will ensure that it remains consistent with the SPG reflecting that the population data and forecasts for the GDA Strategy are those set in the SPG. It is also important that the County Retail Strategy is reviewed to ensure that it remains consistent with the GDA Strategy. It is recommended that a review of the Strategy follows that of the GDA Strategy in Summer 2004.

APPENDIX A
GLOSSARY OF TERMS

Bulky Goods Retailing

Goods generally sold from retail warehouses where DIY goods or goods such as flatpack furniture are of such a size that they would normally be taken away by car and not be manageable by customers travelling by foot, cycle or bus, or that large floor areas would be required to display them e.g. furniture in room sets, or not large individually, but part of a collective purchase which would be bulky e.g. wallpaper, paint.

Comparison Retailing
This type of retailing includes:
- Clothing and footwear
- Furniture, furnishings and housheold equipment (excluding non-durable goods)
- Medical and pharmaceutical products, therapeutic appliances and equipment
- Educational and recreation equipment and accessories
- Books, newspapers and magazines
- Goods for personal care and goods not elsewhere classified

Convenience Retailing
This type of retailing includes:
- Food
- Alcoholic and non-alcoholic beverages
- Tobacco
- Non-durable household goods

Core Retail Area
Normally defined as the area including and immediate to the 'prime pitch'. That is the area that achieves the highest rentals, best yields, is highest in demand from operators, is overwhelmingly retail floorspace and has the highest footfall of shoppers.

Extant Planing Permissions
These are planning applications that have received full planning permission and are either yet to be built or under construction, but not yet trading.

Floorspace
Primarily we are interested in **net** floorspace, which is the area of a shop or store that is devoted to the sales of retail goods. This is distinguished from **gross** floorspace, which includes the sales area, plus storage space, offices, toilets, other staff facilities and circulation space.

Greater Dublin Area (GDA)
The GDA includes the four local authority areas of Dublin, along with the counties of Kildare, Meath and Wicklow.

Market Share
The percentage of total retail expenditure by persons living in the study area that is spent in retail outlets located in the study area. That remaining proportion that is spent in other areas outside of the study area is often referred to as *leakage*.

Sequential Test
This test sets out the guiding principles for the location of new major retail schemes. In the first instance, the priority should be in locating new retail development within town centres. If town centre locations are not readily available within a reasonable and realistic timescale then edge of centre sites should be looked to i.e. sites that are within 300 – 400 metres of the core retail area. Only after the options for town centre and edge of centre are exhausted should out of centre locations and sites be considered.

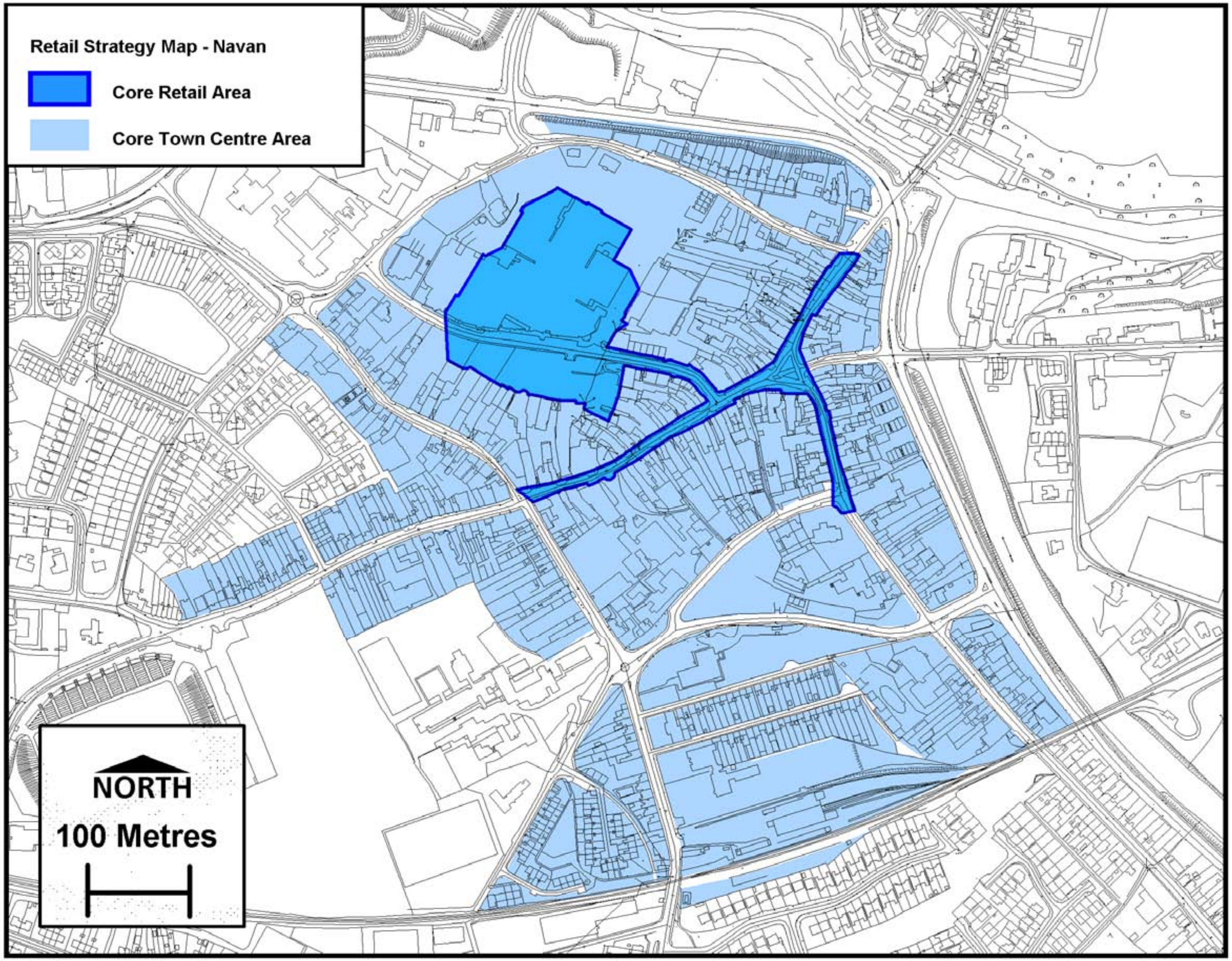
Trade Draw
The proportion of total expenditure in retail outlets located in the study area that is due to persons living outside the study area. This is often referred to as *visitor expenditure*.

APPENDIX B
LIST OF SUBMISSIONS

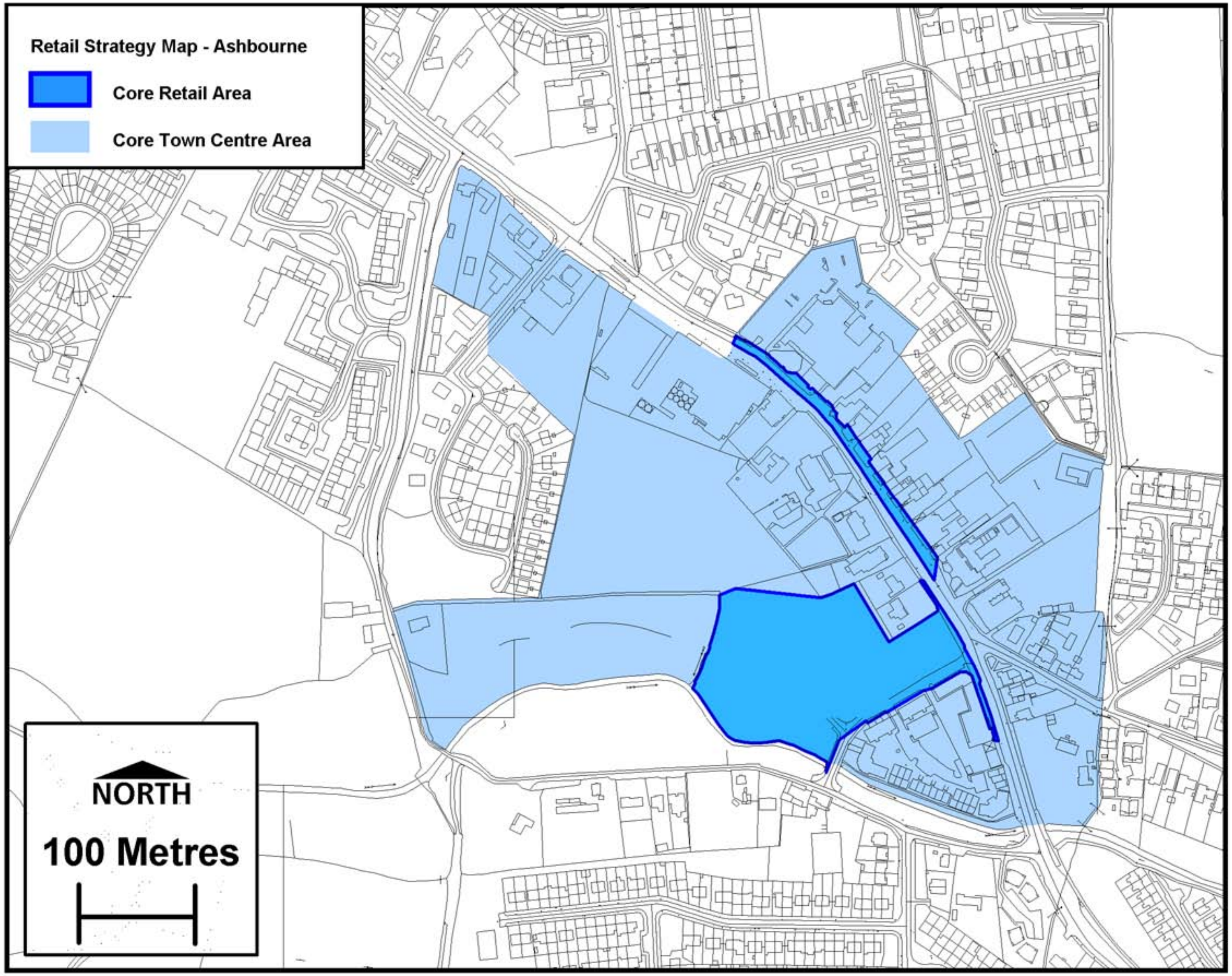
List of submissions received in relation to the Pre-Draft County Meath Retail Strategy
Submitted by
1. Stephen Ward Planning & Development Consultants on behalf of Shannon Homes (Drogheda) Ltd.
2. Development Planning partnership on Behalf of Tesco (Ireland) Ltd
3. RG DATA
4. Kells District Chamber of Commerce.

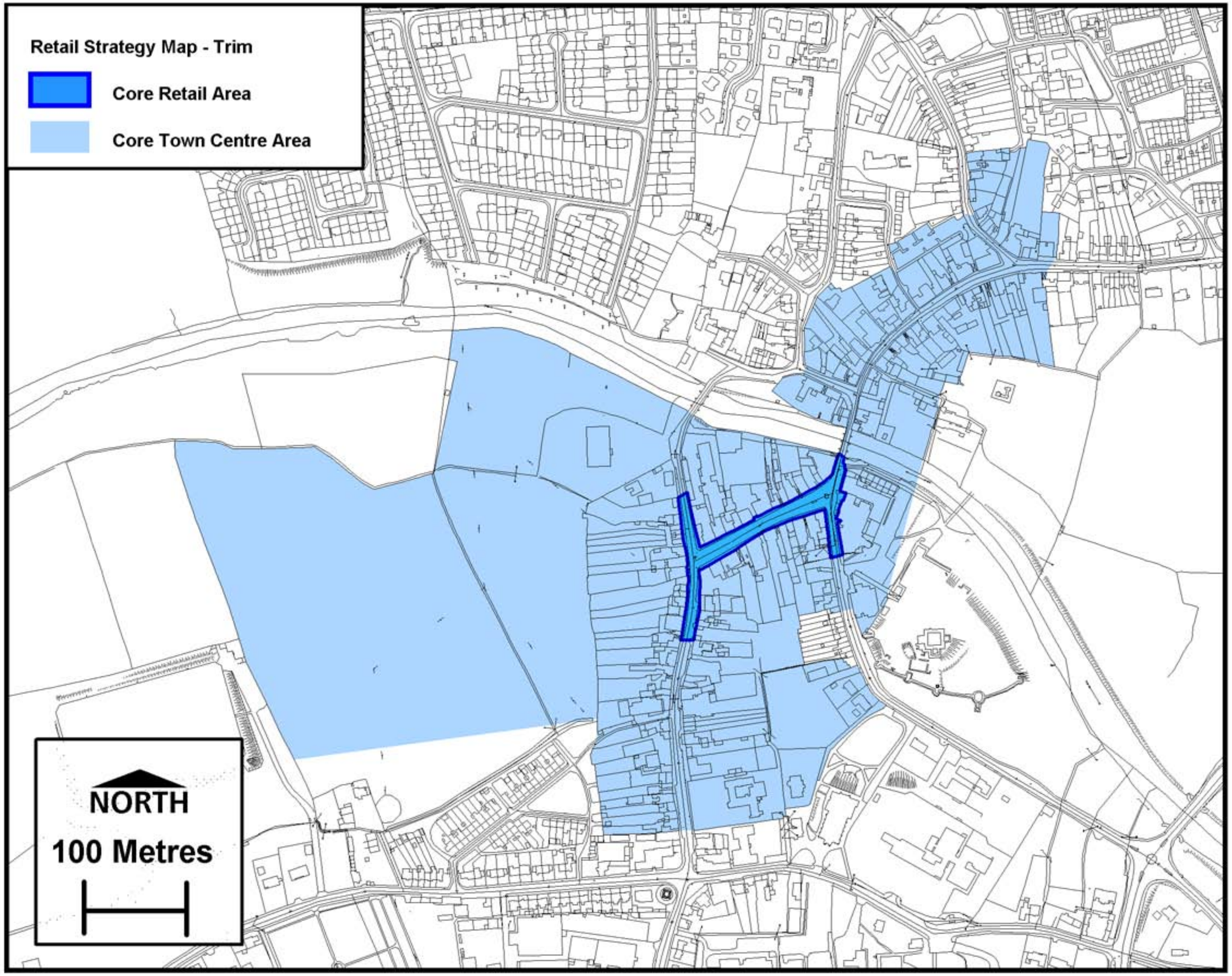
List of submissions received in relation to the Draft County Meath Retail Strategy / Proposed Variations to Development Plans
Submitted by
1. Fergal MacCabe on behalf of RGDATA
2. Woodies DIY Ltd
3. Development Planning Partnership on behalf of Tesco Ireland Ltd
4. John Laffan, Assistant Principle, Spatial Policy, Department of Environment Heritage and Local Government
5. Health & Safety Authority
6. Dublin Transportation Office
7. Councillor Shaun Lynch
8. Simon Clear on behalf of Phil Dillon, Pat Fallon and Seamus Donnegan
9. Keith Simpson and Associates on behalf of Joe Kirwin and Christopher Kirwin
10. Stephen Ward on behalf of Shannon Homes (Drogheda) Ltd
11. Brian Meehan & Associates on behalf of Laurence O’Brien, M O’Reilly and Kells Shopping Centre
12. Lidl Ireland GmbH
13. John Spain Associates on behalf of Aldi Stores Ireland Ltd
14. Brian Meehan & Associates on behalf of Mr M O’Reilly

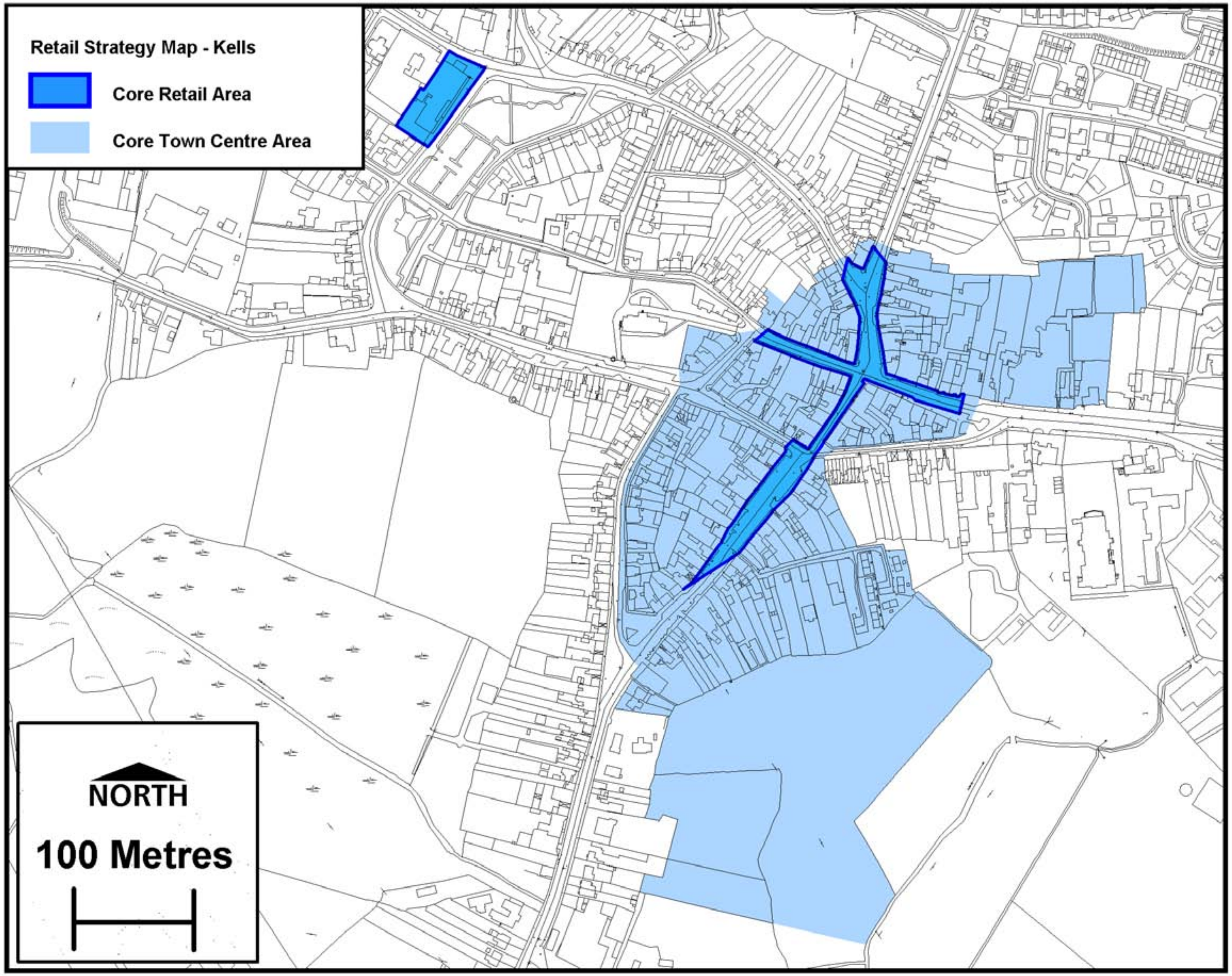
APPENDIX C
RETAIL STRATEGY MAPS FOR NAVAN, ASHBOURNE, TRIM AND KELLS



Retail Strategy Map - Navan
Core Retail Area
Core Town Centre Area
NORTH
100 Metres


Retail Strategy Map - Ashbourne
Core Retail Area
Core Town Centre Area
NORTH
100 Metres


Retail Strategy Map - Trim
Core Retail Area
Core Town Centre Area
NORTH
100 Metres


Retail Strategy Map - Kells
Core Retail Area
Core Town Centre Area
NORTH
100 Metres

APPENDIX D
VARIATIONS TO DEVELOPMENT PLANS

MEATH COUNTY COUNCIL

COUNTY DEVELOPMENT PLAN 2001

VOLUME ONE

Variations

In order to facilitate the incorporation of the County Retail Strategy, 2003, the following sections of the County Development Plan shall include the following amendments:

Table of Contents
Insert new subheading:
2.6.9 Retail Strategy

Section 2
Insert the following text immediately before section 2.7 Strategic Infrastructure Needs
2.6.9 Retail Strategy
The county's retailing profile is set out in the County Retail Strategy, 2003, and indicates existing retail floor area and forecasts future retail demands. The strategy further identifies the manner in which retail development/demand is to be met within the county, and the objectives and policies which are required to ensure that a sustainable retail hierarchy is put in place.

The objectives and development standards and guidelines outlined in the adopted county retail strategy shall inform all retail proposals within the county.

Section 3.2.2 Retailing and Commercial Activities
Insert the following text as a second paragraph under the subheading 'background'
As required by the Department of Environment and Local Government Retail Planning Guidelines, 2000, a County Retail Strategy has been prepared for Meath. This Strategy, on its adoption, became an integral component of all statutory development plans in the County. The strategy provides a detailed assessment of the retailing needs of the county (generally updating and expanding on the 'future needs' section below), and identifies the most appropriate way in which to accommodate such needs. In this regard, all retail proposals will be considered on the basis of its compliance with the County Retail Strategy, 2003.

Insert the following text as a first statement under the subheading 'Objectives'
The Planning Authority will ensure that all new retail proposals comply with the objectives and standards as laid out in the County Retail Strategy, which shall, where conflict arises, be deemed to supercede the objectives identified below.

Insert the following additional objective:
Having regard to the scale of residential development in the south Drogheda Environs area, including its wider rural/hinterland catchment, lands at Colpe Cross zoned A2, are considered to be such as could reasonably accommodate a retail development of neighbourhood/small district centre scale, subject to the findings of a Retail Impact Study and Traffic Impact Study.

MEATH COUNTY COUNCIL

EAST MEATH DEVELOPMENT PLAN 2000

WRITTEN STATEMENT

Variations

In order to facilitate the incorporation of the County Retail Strategy, 2003, the following sections of the East Meath Development Plan shall include the following amendments:

Table of Contents
Insert new subheading:
4.6 Retail

Section 1
Insert the following text immediately after s.1.9.2
1.9.3 Retail
As required by the Department of Environment and Local Government Retail Planning Guidelines, 2000, a County Retail Strategy has been prepared for Meath. This Strategy, on its adoption, became an integral component of all statutory development plans in the County. The county's retailing profile, and thus that of the East Meath Area, is set out in the County Retail Strategy, 2003, which indicates existing retail floor area and forecasts future retail demands.

Section 2
Insert the following text immediately after the text of section 2.2 Commercial, within same paragraph
The County Retail Strategy, 2003, which indicates existing retail floor area and forecasts future retail demands, further identifies the manner in which retail demand is to be met within the county, and the objectives and policies which are required to ensure that a sustainable retail hierarchy is put in place. The objectives and development standards and guidelines outlined in the adopted county retail strategy shall inform all retail proposals within the county.

Section 3.3 Commercial
Insert the following text as a first policy (bullet point)
The Planning Authority will ensure that all new retail proposals comply with the objectives and standards as laid out in the County Retail Strategy, which shall, where conflict arises, be deemed to supercede the policy identified below.

Section 4.6 Retail
Create a new subheading after 4.5 Amenity, inserting the following text
4.6 Retail
It is an objective of the Council to:
RL1 Ensure that all new retail proposals comply with the objectives and standards as laid out in the County Retail Strategy, 2003.

MEATH COUNTY COUNCIL & TRIM TOWN COUNCIL

TRIM DEVELOPMENT PLAN 2002

WRITTEN STATEMENT

Variations

In order to facilitate the incorporation of the County Retail Strategy, 2003, the following sections of the Trim Development Plan shall include the following amendments:

Section 1.9
Insert the following text immediately after paragraph of s.1.9
As required by the Department of Environment and Local Government Retail Planning Guidelines, 2000, a County Retail Strategy has been prepared for Meath. This Strategy, on its adoption, became an integral component of all statutory development plans in the County. The county's retailing profile, including that of development centres such as Trim, is set out in the County Retail Strategy, 2003. The strategy indicates existing retail floor area and forecasts future retail demands and identifies the manner in which retail development/demand is to be met within the county, and the objectives and policies which are required to ensure that a sustainable retail hierarchy is put in place.

Section 2.4
Insert the following text immediately after the text of section 2.4 Commercial.
The County Retail Strategy, 2003, which indicates existing retail floor area and forecasts future retail demands, further identifies the manner in which retail demand is to be met within the county, and the objectives and policies which are required to ensure that a sustainable retail hierarchy is put in place. The objectives and development standards and guidelines outlined in the adopted county retail strategy shall further inform all retail proposals within Trim and environs.

Section 3.7 Commercial
Insert the following text as a first policy
The Planning Authority will ensure that all new retail proposals comply with the objectives and standards as laid out in the County Retail Strategy, which shall, where conflict arises, be deemed to supercede the policies identified below.

Section 4.8 Retailing
Insert the following text as a first policy

RLT0 The Planning Authority will ensure that all new retail proposals comply with the objectives and standards as laid out in the County Retail Strategy, 2003. The objectives and development standards outlined in the Strategy shall, where conflict arises, be deemed to supercede the policies identified below.

RLT1 While all retail developments shall be subject to sequential testing, as outlined in the County Retail Strategy, in respect of heritage towns such as Trim, the 'historical' character/street and land pattern, may be such as would not allow for easy accommodation of certain retail developments (by reason of their scale or other) and consideration of this unique locational factor will be taken into account in the context of 'site selection' regarding the sequential test. This shall not be seen as automatically supporting the argument that a site's inability to accommodate a pro-forma type development shall be seen as lack of availability of a town centre site.

Section 5.8 Shopping Centre

Replace first sentence/amend first sentence such that it reads

Applications for shopping centre developments shall be examined with regard to the requirements of the County Development Plan, the County Retail Strategy and guidelines issued by the Department of Environment.

MEATH COUNTY COUNCIL & KELLS TOWN COUNCIL

KELLS DEVELOPMENT PLAN 2001

WRITTEN STATEMENT

Variations

In order to facilitate the incorporation of the County Retail Strategy, 2003, the following sections of the Kells Development Plan shall include the following amendments:

Section 1.7
Insert the following text immediately before existing paragraphs of s.1.97
As required by the Department of Environment and Local Government Retail Planning Guidelines, 2000, a County Retail Strategy has been prepared for Meath. This Strategy, on its adoption, became an integral component of all statutory development plans in the County. The county's retailing profile, including that of development centres such as Kells, is set out in the County Retail Strategy, 2003. The strategy indicates existing retail floor area and forecasts future retail demands and identifies the manner in which retail development/demand is to be met within the county, and the objectives and policies which are required to ensure that a sustainable retail hierarchy is put in place. In general the following is considered true and applicable to Kells.

Section 2.5
Insert the following text immediately after the text of section 2.5 Commercial Development
The County Retail Strategy, 2003, which indicates existing retail floor area and forecasts future retail demands, further identifies the manner in which retail demand is to be met within the county, and the objectives and policies which are required to ensure that a sustainable retail hierarchy is put in place. The objectives and development standards and guidelines outlined in the adopted county retail strategy shall further inform all retail proposals within Kells and environs.

Section 3.5 Commercial Development
Insert the following text as a point
Having regard for the need to confirm the retail hierarchy of the county and the role of centres and the size of the main town centres, to provide strategic guidance on the location and scale of retail development, to provide policies and action initiatives to encourage the improvement of town centres and to identify criteria for the assessment of retail developments, the Planning Authority will require that all new retail proposals comply with the objectives and standards as laid out in the County Retail Strategy, which shall, where conflict arises, be deemed to supercede the policies identified within this Plan.

Section 4.3 Commercial Development

Insert the following text as a first policy/bullet point

The Planning Authority will ensure that all new retail proposals comply with the objectives and standards as laid out in the County Retail Strategy, 2003. The objectives and development standards outlined in the Strategy shall, where conflict arises, be deemed to supercede the policies identified below.

While all retail developments shall be subject to sequential testing, as outlined in the County Retail Strategy, in respect of heritage towns such as Kells, the ‘historical’ character/street and land pattern, may be such as would not allow for easy accommodation of certain retail developments (by reason of their scale or other) and consideration of this unique locational factor will be taken into account in the context of ‘site selection’ regarding the sequential test. This shall not be seen as automatically supporting the argument that a site’s inability to accommodate a pro-forma type development shall be seen as lack of availability of a town centre site.

Having regard to the established retailing practice at Kells Shopping Centre, notwithstanding the zoning objective pertaining to the area, the planning authority shall support the enhancement of retailing at this location subject to proper planning and development principles being adhered to.

MEATH COUNTY COUNCIL & NAVAN TOWN COUNCIL

NAVAN ENVIRONS DEVELOPMENT PLAN 1997

NAVAN TOWN PLAN 1996

WRITTEN STATEMENTS

Variations

In order to facilitate the incorporation of the County Retail Strategy, 2003, the following sections of the Development Plan shall include the following amendments:

Insert at end of Preface
As required by the Department of Environment and Local Government Retail Planning Guidelines, 2000, a county retail strategy has been prepared for Meath. This Strategy, on its adoption, became an integral component of all statutory development plans in the County. The county's retailing profile, including that of development centres such as Navan and environs, is set out in the County Retail Strategy, 2003. The strategy indicates existing retail floor area and forecasts future retail demands and identifies the manner in which retail development/demand is to be met within the county, and the objectives and policies which are required to ensure that a sustainable retail hierarchy is put in place.

It is the policy of the Council to ensure that all new retail proposals comply with the objectives and standards as laid out in the County Retail Strategy, 2003. The objectives and development standards outlined in the Strategy shall, where conflict arises, be deemed to supercede the policies identified within this Plan.