



Introduction

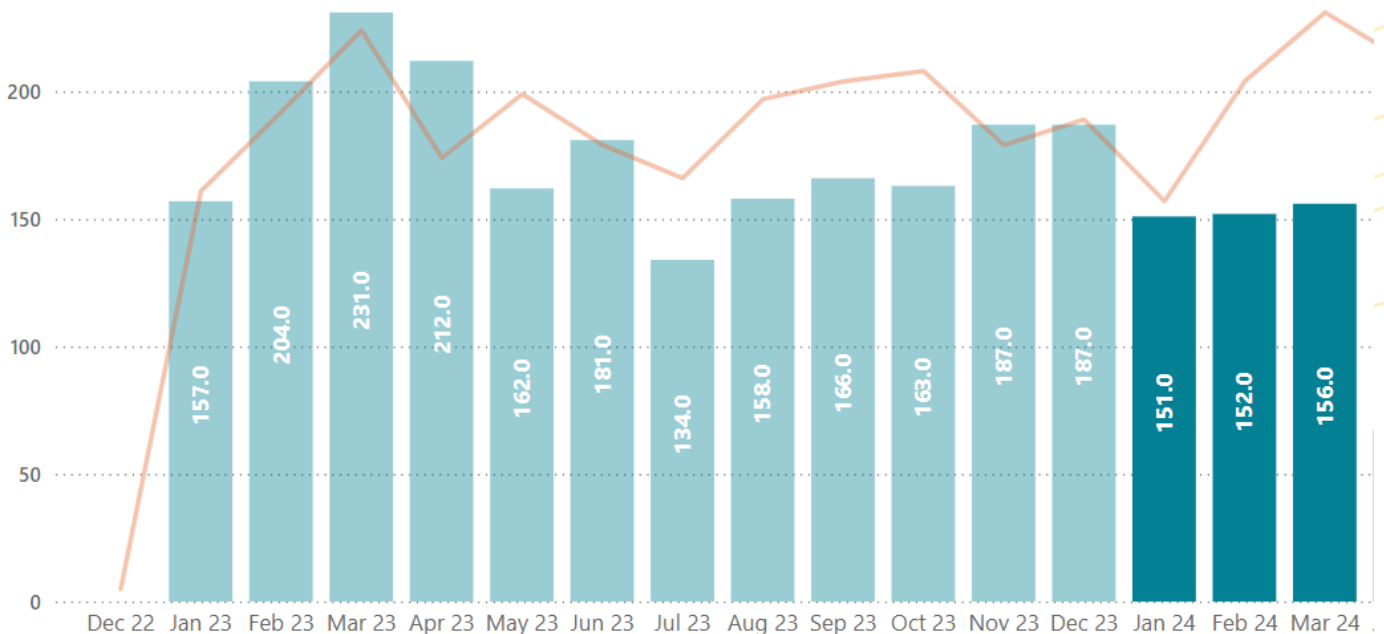
In this report we look at planning and construction activity in Northern Ireland in Q1 2024. Covering all stages of the construction cycle from an early planning stage to projects on site, we will look to compare how Q1 2024 fared in comparison with Q1 2023.

Plans Submitted

In Q1 2024 we saw the volume of planning applications decrease by 22% compared to the same time last year. However, the value of these applications saw an increase of +54%.

Plans Submitted by Volume

● Northern Ireland — Same Period Last Year



Q1 2024 Planning submitted across all sectors (NI)

So, while we saw a lesser volume of applications being submitted to the local authorities, the applications that were submitted were of much higher construction value.

Two of these large value projects were the [£73 million Ballyoan Housing Development in Co. Derry](#) which will see the construction of 676 dwellings and The Sixth Commercial, Retail and Leisure Development in Belfast by McAleer and Rushe.

Most sectors saw a decline in plans submitted quarter to quarter with the hospitality sector seeing a decrease of -19% in the volume of applications submitted year on year.

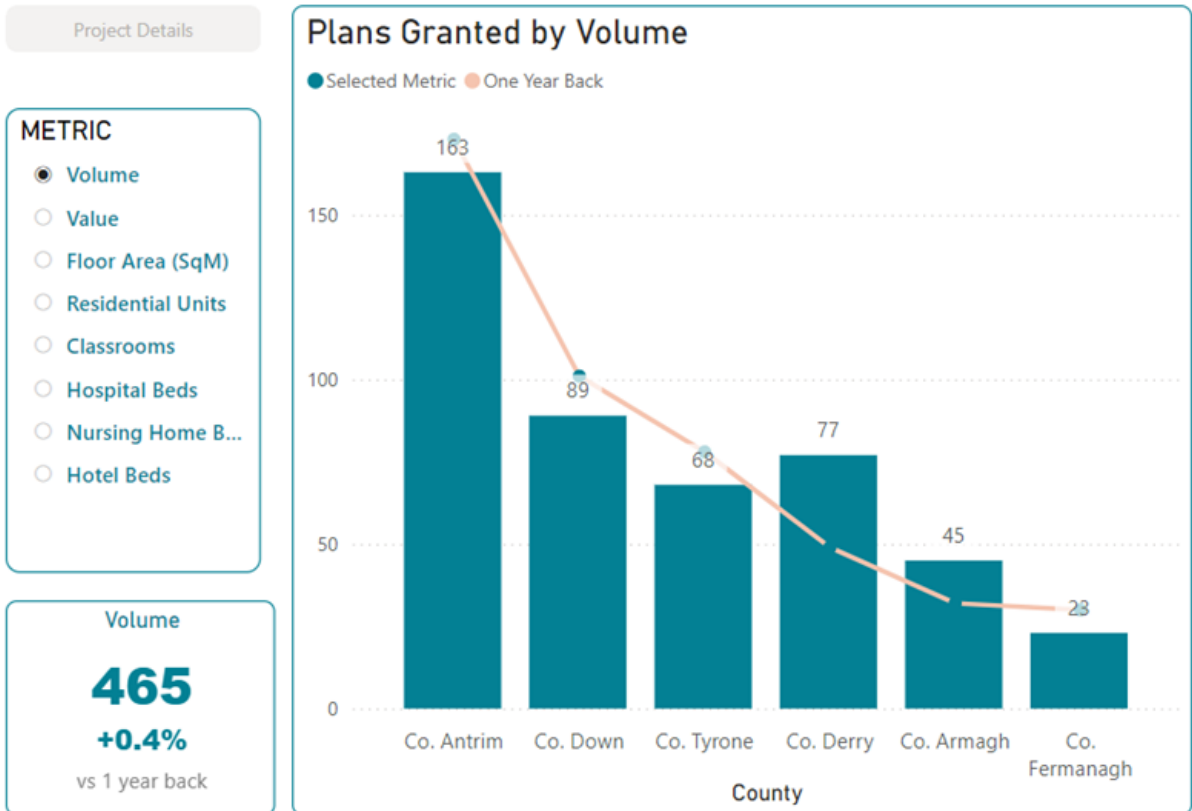
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The Sixth, Belfast. Image: Allford Hall Monaghan Morris

Plans Granted

In Q1 2024 the number of planning applications approved stood at 465, showing a decrease of 4% compared to Q1 2023. The construction value of plans approved also saw a downturn of 25% compared to Q1 2023.



Q1 2024 Planning approved across all sectors (NI)

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One notable project of high value that was approved in March 2024 is the [£39.5 million mixed use development at Ebrington Barracks, Co. Derry](#). The approval allows for residential, office, creative and commercial uses.



£39.5m - Mixed Use Development, Ebrington Barracks

The Education sector saw the largest increase in planning applications approved, up 163.6% against Q1 2023, which equates to an estimated construction value of £22.67 million and 65 classrooms.

A number of applications were recommended for refusal by local planning committees, these included two applications for the Top of The Hill social housing development in Derry. No official decision has been made since the applications were brought before the Derry & Strabane planning committee in February 2024.

Project Starts

The volume of project starts in Q1 2024 (works commencing on site) showed a decline of 10% compared to Q1 2023. However, the construction value of project starts showed an increase of +41%.

January saw the largest volume and value of projects commencing on site. Co. Antrim saw 35 projects start on site in Q1 2024 which equates to an estimated construction value of around £299 million.

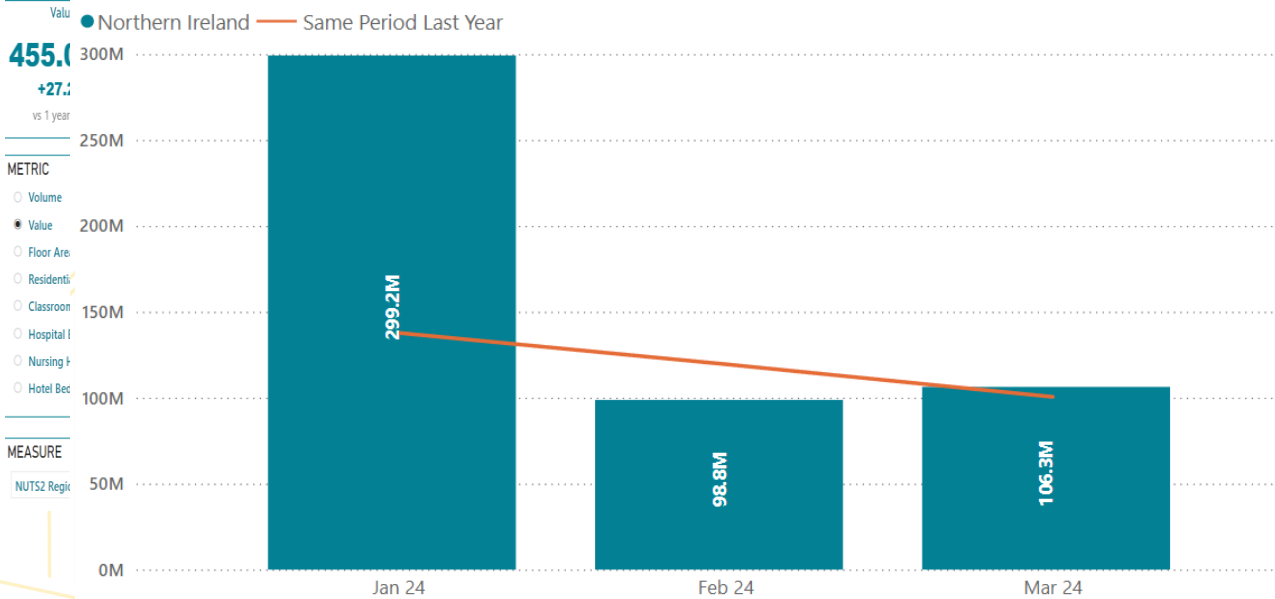
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Q1 Construction Activity Review

Northern Ireland

Project Starts by Value



Q1 2024 Project Starts across all sectors (NI)

The [£7m Lidl Supermarket & Drive Thru at Boucher Road](#), Belfast and the Waters Edge apartment development in Greenisland are two projects that commenced on site Co. Antrim.



Lidl, Boucher Road, Belfast. Image: Clarman Partnersip

In Co. Fermanagh only 1 major project started on site, the [Waste Transfer Station at Drumcree Recycling Centre in Enniskillen](#). The project, with a construction value of £2.3 million, commenced on site in February 2024 and is being undertaken by McCusker Contract, Co. Tyrone.

The hospitality sector saw the highest increase in project starts with an impressive +700% in the volume of projects starting on site in Q1 2024 compared to Q1 2023. The housing sector did not fare as well unfortunately with a decline of 35% in project starts in Q1 2024 compared to Q1 2023.

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Obstacles & Opportunities for 2024

One major factor that affected planning and construction works in Q1 2024 is the “housing crisis” in Northern Ireland. 19,000 homes are reportedly being held up by wastewater capacity limits. NI water, the public body that maintains our water supply and infrastructure, has said that limits to its funding mean that it can’t provide the infrastructure to support housing developments. We can see the impact that these issues are having already in Q1 2024, with plans submitted, approved and projects starting on site all down compared to the same time last year.

Devolved government returned to Northern Ireland in February 2024 after a 24-month hiatus. Following the return, CEF, which represents around 70 per cent of construction in Northern Ireland, set out a 10-point plan for stimulating the country’s construction sector. The list includes planning reform, fresh housing targets and the creation of an independent infrastructure commission.

The hospitality industry has seen its fair share of setbacks in the last number of years, highlighted earlier with this sector showing the largest decline in planning applications submitted. However, one council hoping to bolster the industry is Newry and Mourne District Council. They are due to launch a £1m hotel development pot to boost tourism. The capital grant fund was originally approved in February 2020 but was delayed due to a number of factors including Covid. The funding will be aimed at hotel new build and expansion projects with a minimum of 15 bedrooms which have had a planning application submitted. A maximum support grant of £300k is detailed.

In the Education sector it was announced in February 2024 that seven new build projects will now be progressed. It had previously been announced in May 2023 that the process for 28 schools earmarked for new buildings were paused. The tendering procedure commenced in March 2024 for the appointment of Integrated Consultant Teams for each of these projects.

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