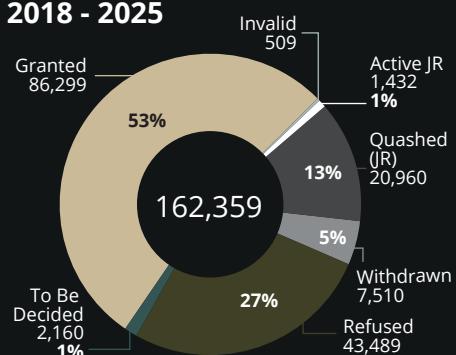


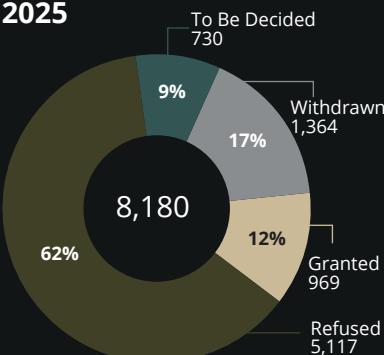
STRATEGIC HOUSING DEVELOPMENT (SHD) PLANNING STATS

SHD APPLICATIONS

2018 - 2025

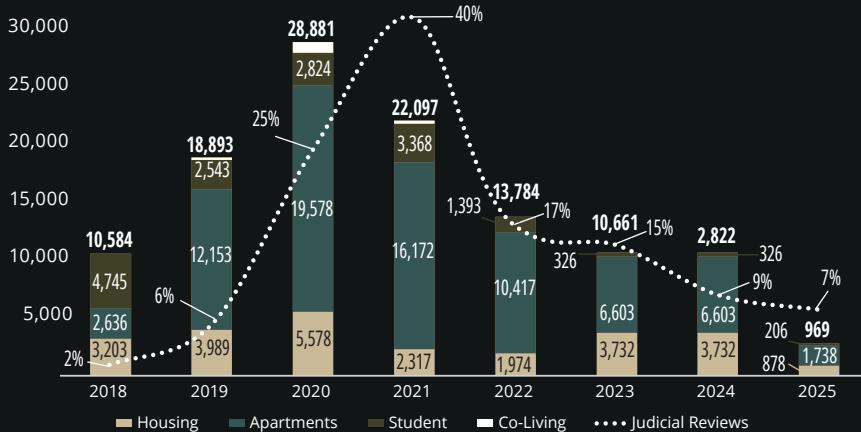


2025



- SHD's yet to be decided upon by ACP have reduced from 29 schemes (9,607 units) in 2024 to 11 schemes (2,160 units), a 78% reduction. The remaining 10 schemes are an average of 465 days late at the end of '25.
- The earliest of the 10 schemes was due to be assessed by ACP in Feb 2022.
- Of the 10 schemes, 35% are housing, 55% are apartments and 10% are Co-Living.
- SHD permissions accounted for 969 units in 2025, 208 of the 208 units have since been quashed through Judicial Review.
- Refusal rate in 2025 higher than average (62% vs. 23%)

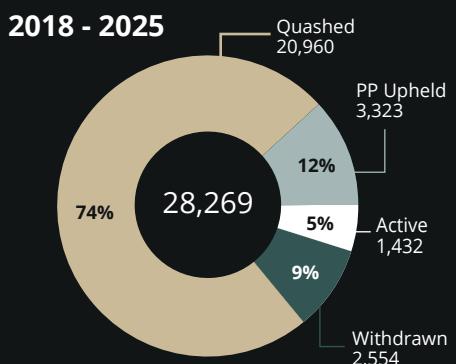
SHD PERMISSIONS



- The SHD process ceased from 25th February 2021
- The current permissions being granted were applied for before Feb 2021
- The % of JR's has fallen again this year - down from a high of 40% in 2021 to 7% in 2025 permissions.
- While preference was given to housing over apartments in previous years, this has changed in 2025 with both now on a similar percentage
- There are no student schemes awaiting decision any longer under the SHD route.
- There is one co-living typology, banned since Nov 2020, still waiting permission.

SHD JUDICIAL REVIEWS

2018 - 2025



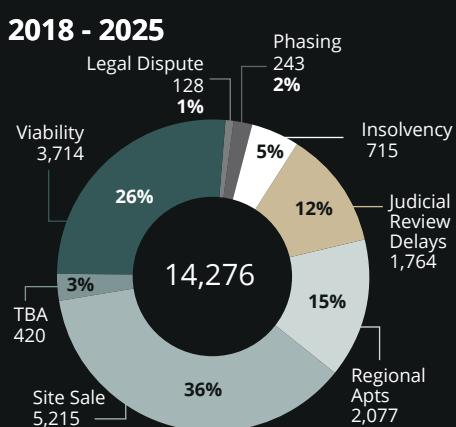
2025



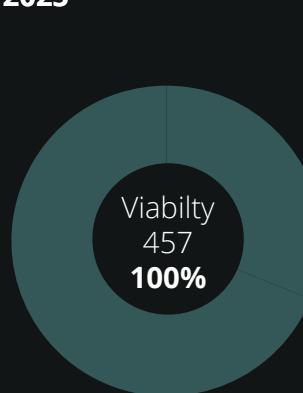
- There are 5 Nr. SHD schemes (1,432 units) held up in JR's yet to be ruled upon by courts. This is a reduction of 15 schemes (4,254 units) in the since 2043.
- Of the 5 schemes, 20% are housing, 65% are apartments and 15% are student
- There are no active JR's on 2025 schemes.
- Of the 20,960 units (1,375 increase on 2024) units quashed, 18,083 (51 out of 60 schemes) reapplied again with a new planning application. Some were subject to JR again and some received permission.

SHD NON-COMMENCEMENTS

2018 - 2025



2025



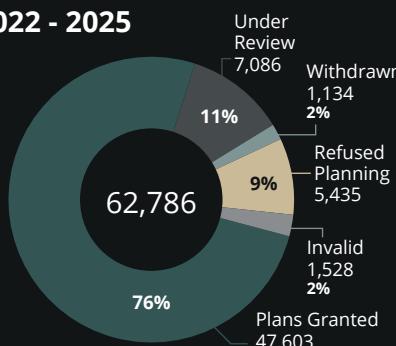
- The number of non-commencements (schemes that have a valid planning permission but haven't started on site) reduced by 19% from 56 schemes (20,109 units) to 44 schemes (14,276 units) since 2024.
- It is likely that the 14,276 units will take a number of years to commence and will likely involve site sale or State intervention to proceed.
- There are 4,556 student beds yet to commence.

FAST-TRACK PLANNING ROUTES (SHD/LRD) INFOCARD JANUARY 2026

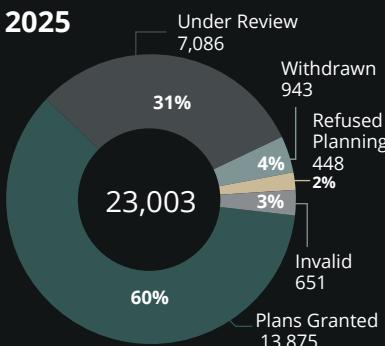
LARGE-SCALE RESIDENTIAL DEVELOPMENT (LRD) PLANNING STATS LRD APPLICATIONS

LRD APPLICATIONS

2022 - 2025



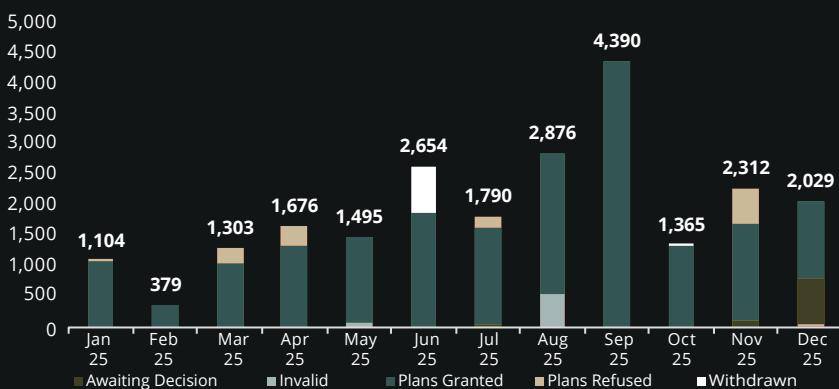
2025



- There were 268 schemes (+98 on last year) applied for under the LRD system by the end of 2025.
- 76% of LRD's to date have been approved compared to 53% of the SHD schemes.
- There are a further 32 schemes to be opined upon by ACP by March 2026, which make up 7,086 units.
- 9% of LRD schemes have been refused, compared to 27% of SHD schemes to date.

LRD PERMISSIONS

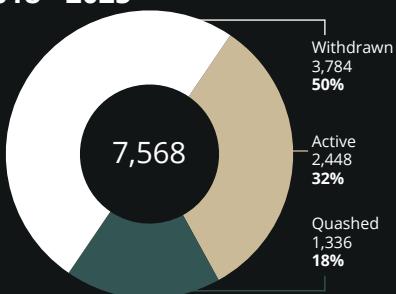
2025



- 93 schemes were granted permission in 2025, resulting in 19,241 units, which is 1,553 more than 2024.
- 60% of schemes were granted permission in 2025, compared to 12% under the SHD route.
- 2% of LRD schemes were refused compared to 62% in SHD.
- 7 schemes have yet to be decided upon, making up 1,175 units.
- The LRD programme granted 95 permissions (19,241 units) in 2025 comprising 46% apartments, 35% housing and 19% student.

LRD JUDICIAL REVIEWS

2018 - 2025



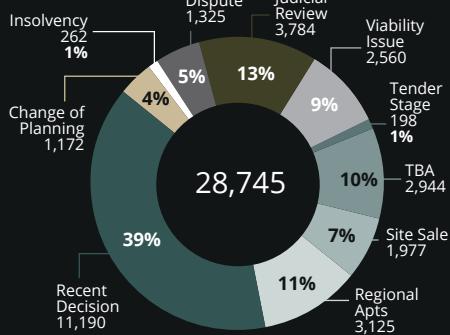
2025



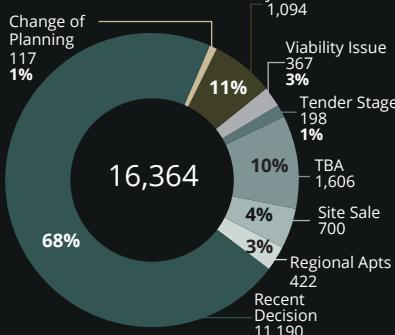
- Of the 20,959 units granted permission in 2025, there were 666 JR's at the end of December 2025.
- There were 16 schemes still within the 8 week JR notice period (where a JR can still be taken) at the end of 2025.
- There are 2,422 units currently held up in JR's for the overall 48,088 permitted LRD units, which equates to 5%.
- The 5% JR rate compares with the 17% JR rate for SHD's on average for SHD's from 2018-25.
- The 83% usable permissions, after JR, compares to 55% under the SHD route.

LRD NON-COMMENCEMENTS

2022 - 2025



2025



- 58 schemes (up 13 on '24) or 23% (24,621 units) have a valid planning permission but haven't started on site
- 68% of the 2025 non-commencements are recent planning permissions.
- The recent permissions (9,696 units) make up 39% of the 2022-25 non-commencements.
- The 24,621 units not yet commenced include 23% (up 8%) housing, 51% (down 16%) apartments and 25% (up 7%) student.
- Viability issues including Site Sales and Regional Apartments make up 14% (down 10%) (5,685 units) of the non-commencements to date.
- The rate of non-commencements for reasons other than Recent Permission or JR is increasing year on year.

SHD Vs LRD

2025

