



Strategic Employment Locations Study (SELS)

Staidéar ar Shuíomhanna Fostaíochta Straitéiseacha

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Kildare County Council



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List of Acronyms



3PL	Third Party Logistics
AI	Artificial Intelligence
BER	Building Energy Rating
CDP	County Development Plan
CRU	Commissioner for the Regulation of Utilities
CSO	Central Statistics Office
DMA	Dublin Metropolitan Area
EMRA	Eastern and Midland Regional Assembly
EPBD	Energy Performance of Buildings Directive
EPC	Energy Performance Certificate
ESRI	Economic and Social Research Institute
FDI	Foreign Direct Investment
GDA	Greater Dublin Area
HGV	Heavy Goods Vehicle
ICT	Information and Communications Technology
KIC	Kildare Innovation Campus
KTOV	Kildare Tourist Outlet Village
IDA	Industrial Development Authority
LEO	Local Enterprise Office
LEED	Leadership in Energy and Environmental Design
MD	Municipal District
NPF	National Planning Framework
OPR	Office of the Planning Regulator
PSRA	Property Services Regulatory Authority
R&D	Research and Development
RD&I	Research, Development and Innovation
RSES	Regional Spatial and Economic Strategy
SELS	Strategic Employment Locations Study
TOD	Transport Orientated Development
VRU	Vulnerable Road User
WWTP	Wastewater Treatment Plant

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Introduction

1.1 Overview

The Planning Department of Kildare County Council has prepared a Strategic Employment Locations Study to assist in the preparation of a number of forthcoming settlement plans, in addition to informing the upcoming review of the Kildare County Development Plan 2023–2029 (as varied). This evidenced based report has been developed in accordance with national and regional policy which requires local authorities to identify and quantify locations for strategic employment growth at appropriate locations to sustain national/regional growth targets.

The Strategic Employment Locations Study (SELS) is supported by Action RE A1 of the Kildare County Development Plan 2023–2029 (as varied) (CDP) which provides for the Council to undertake a data-driven assessment, to inform the location of strategic employment sites throughout Kildare, recognising the importance of ensuring sufficient land is zoned for economic activity to reflect and cater for forecasted population growth, whilst identifying and protecting such land from inappropriate development.

On foot of the publication of the revised National Planning Framework (NPF) (April 2025), updated guidance on the implementation of the NPF was issued in July 2025 in the *NPF Implementation: Housing Growth Requirements – Guidelines for Planning Authorities*. These guidelines translate projections and requirements contained in the NPF First Revision (2025) and have earmarked substantial population and housing growth for County Kildare over the period to 2040. This study is therefore considered to also represent a policy response on behalf of Kildare County Council to updated national spatial policy, recognising the need to provide a more strategic approach in creating employment opportunities that can support both recent and projected population growth through more balanced and targeted development across the county. This will be implemented through the identification of sector specific requirements, key socio-economic trends and associated land requirements, ensuring future development takes place in appropriate locations to meet resident skill sets. This study aims to identify strategic employment locations that can cater significant sectoral growth through the integration of land use and transport planning, in addition to the delivery of the necessary supporting infrastructure required.

A high-level aim of the study is to support Kildare County Council, its partners and key stakeholders in achieving employment targets, whilst informing investment strategies for the private and public sector to stimulate continued economic investment in Kildare. The coming together of key industry experts, commercial market advice and infrastructure feasibility expertise in the preparation of this report recognises that future relationships and interactions between these disciplines will determine the success and enhancement of Kildare's economic reputation going forward.



1.2 Scope

The scope of the study is defined through a number of key outputs, as follows:



- A baseline review of key socio-economic trends and the identification of existing gaps and opportunities at settlement level
- A review of industry requirements and key characteristics to attract sectoral investment in certain locations
- Identification of strategic employment locations that are capable of attracting and accommodating office development and associated job types
- Identification of strategic employment locations that are capable of attracting and accommodating light industry development and associated job types
- Identification of strategic employment locations that are capable of attracting and accommodating Research, Development and Innovation (RD&I) sectors and associated job types
- Identification and assessment of sectoral growth and associated typologies to settlements capable of facilitating and attracting such investment (Employment Land Assessment – Appendix A)
- A clear understanding of property and land requirements needed to facilitate projected employment growth targets at settlement level (Employment Strategy– Appendix B)

There can be a large variance with regard to the classifications of employment/sector types. For the purposes of this study, the following definitions have been adopted for reference:



Office: Professional services, Information and Communication Technology, Administrative and Business-related practises, including research that requires office space.

Light Industry: Logistics and distribution, manufacturing and production including specialist engineering practises.

RD&I: Research, Development and Innovation practices, deep technology and life science sectors, including biopharma industries where property solutions will vary from a mix of office and warehousing type space, dependent on the nature and scale of the specific business need.¹

¹ Deep technology refers to cutting edge and often disruptive technologies that are built on profound scientific discoveries, engineering innovations, or advancements in research areas that have the potential to radically transform industries, economies and lives.

1.3 Methodology

This study recognises the variety of factors and influences that are required to be considered when seeking to assess employment needs and opportunities across a diverse range of urban settlement types on the basis of evidence-based data. Figure 1 below outlines the approach and steps taken which draws on both quantitative and qualitative analysis to define and explore key issues within the context of County Kildare.

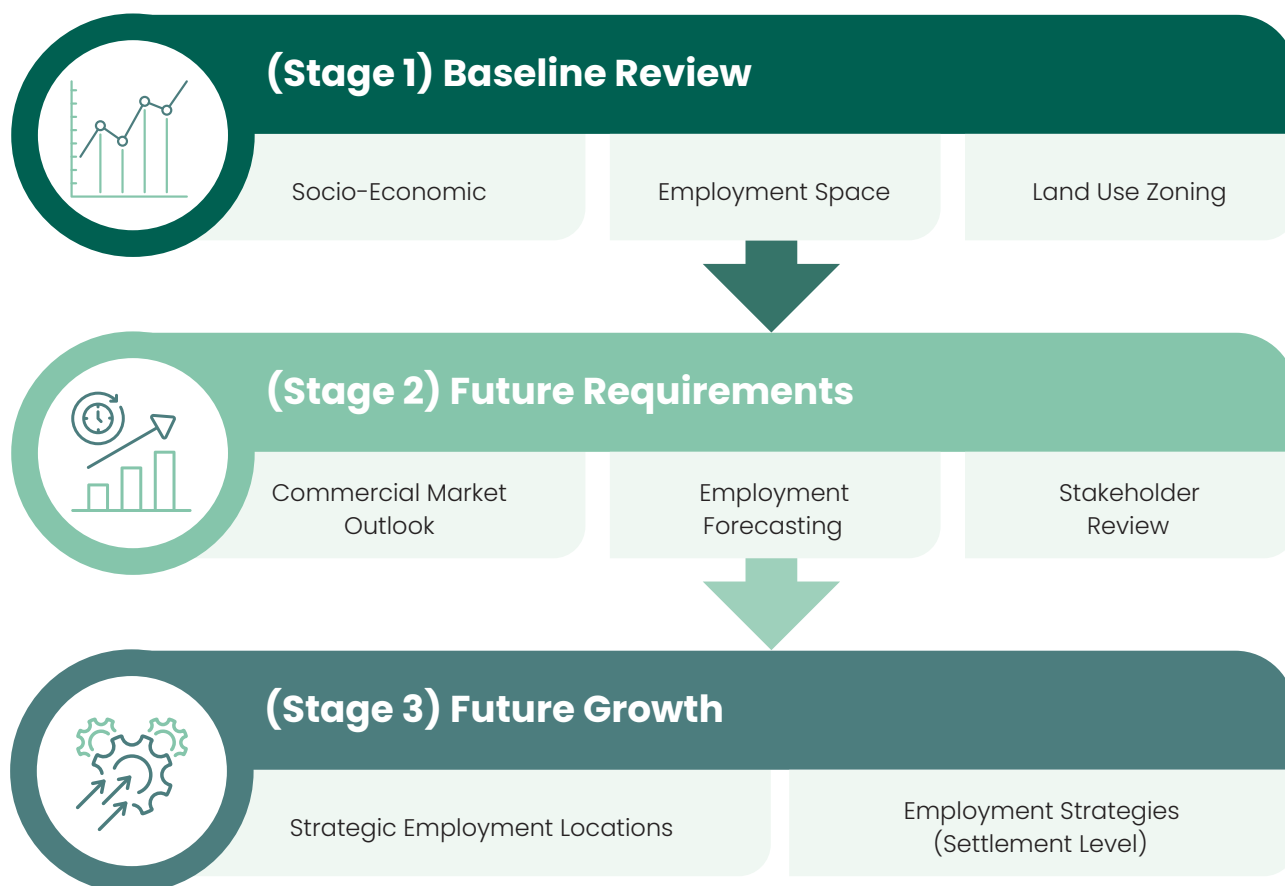


Figure 1: Methodology Employed – Approach Outline

A range of datasets and key performance indicators have been used to establish baseline conditions and forecast projections, supplemented by internal research and analysis undertaken by the Planning Department. Datasets supplied by the All-Ireland Research Observatory (AIRO) derived from the Central Statistics Office (CSO) POWSCCAR² data and GeoDirectory³ data has been integral in indicating the movement of people and the related socio-economic profiles. The GeoDirectory data has been vital in understanding the quantum of commercial property present within settlements including prevailing economic sectors and business uses within the county. This data formed a key component of an audit of enterprises and commercial spaces operating in 25 towns/villages across the county completed by the Planning Department in April 2023.

Data from Census 2022, the most recent census data available at time of publication, was also analysed to understand the socio-economic profile for Kildare, its major settlements and the wider region during this period.

² POWSCCAR stands for Place of Work, School, College or Childcare – Census of Anonymised Records. The childcare category dataset was first included as part of Census 2022.

³ Developed jointly by An Post and [Táilte Éireann](#), GeoDirectory is Ireland's most authoritative electronic register of addresses which are matched precisely to their geographical locations.

The Planning Department procured the services of Lisney Commercial Estate Agents who provided professional expertise and information on the commercial real estate market across the county. Lisney carried out a comprehensive baseline analysis in 2024 and subsequently provided the Council with a range of updated information detailing commercial market activity and floorspace indicators as of Quarter 1 (Q1) 2026. Accordingly, it is important to note that the inputs informing this study are based on a moment in time assessment, where every effort was made to incorporate the latest data sets and other evidence available, including reasonable assumptions where applicable at the time of preparation and publication.

1.4 Study Area

The study area for this strategy is the administrative boundary for County Kildare; however appropriate consideration has been given to the Greater Dublin Area (GDA)⁴ and the Dublin Metropolitan Area (DMA)⁵ in a number of different parts of the report, recognising the influence and interdependencies that the wider region has on economic activity within the county.

1.5 Report Structure

The study is structured as follows:



Section 2 – Socio-economic Profile: A profile of County Kildare and key settlements using employment based socio-economic indicators.

Section 3 – Employment Space Overview: A review of County Kildare's industrial and office markets, examining spatial distribution and assessment of current market and sectoral trends.

Section 4 – Land Use Zoning: A review of the existing position in respect of employment land use zoning across County Kildare, including an analysis of available land for future investment.

Section 5 – Stakeholder Review: A review of stakeholder engagements undertaken to identify gaps and pinpoint opportunities for future employment investment.

Section 6 – Employment Land Requirements: A detailed insight into future land and space requirements to facilitate sectoral growth and projected job targets.

Section 7 – Future Supply – Strategic Employment Locations: Identification of site requirements for future investment, including future strategic employment locations.

Section 8 – Implementation: Identification of key components and study recommendations, including the relevant statutory framework required.

⁴ The Greater Dublin Area (GDA) comprises the four Dublin Local Authorities along with Counties Wicklow, Meath and Kildare.

⁵ The Dublin Metropolitan Area (DMA) is the functional urban region centred on Dublin, used mainly for planning, transport and statistical purposes. It includes Dublin City and adjoining suburbs and extends into the urbanised areas of surrounding counties. The DMA covers the north-eastern part of County Kildare containing the settlements of Leixlip, Celbridge, Maynooth and Kilcock. The DMA is covered by the Metropolitan Area Strategic Plan (MASP) which is contained in the Regional Spatial and Economic Strategy 2019–2031 for the Eastern and Midlands Region.

2

Socio Economic Profile

This section profiles County Kildare using key socio-economic indicators to understand local economic strengths and challenges that may influence future employment requirements. The analysis provides a disaggregated breakdown and insight into each settlement examining job profiles, resident workforce skill sets, including travel to work data. The analysis provides commentary in terms of established or emerging trends at settlement level, whilst aiming to identify any gaps or opportunities from an economic perspective. For a comparative assessment, County Kildare will be benchmarked against the Dublin Metropolitan Area and other important national and regional metrics.

Kildare's economic profile exhibits significant structural strengths relative to other parts of Ireland. The following section contains some key data from Census 2022 relating to Kildare's economic standing and how it has developed over the intercensal period since 2016:

Economic Performance



93% of the county at work which has increased by 20% (+18,882) since 2016.



Of the 114,328 resident workers in Kildare, a total of 46.8% (53,489) are employed within the county.



36.5% (41,688) of residents commute outside Kildare for work.



Key employment destination with 25,149 commuting into Kildare for work.



Foreign Direct Investment (FDI) employment (61.8%) is greater than indigenous enterprises in Kildare.



There are 15,372 active enterprises in Kildare, +15% increase in the period 2019-2022.



57% of FDI supported industries in the Mid-East Region⁶ are located in Kildare.



Small firms (<10 employees) account for 93.2% of enterprises with 3 out of 10 residents working in such jobs (29.7%).



78,638 local jobs in Kildare which is an increase of 24.8% (+15,563) since 2016.



Firms of between 10-250 persons provide employment for 36.4% of residents.



Key employment locations are recorded in Naas (11,690 jobs), Leixlip (9,166), Newbridge (7,337) and Maynooth (6,898).



Large firms of 250+ persons account for 39.8% of resident jobs.

⁶ The Mid-East Region comprises Counties Kildare, Meath and Wicklow.

2.1 Population

Demand for employment sites and new investment will be driven in part by the resident population of an area. Over the intercensal period between 2016 and 2022, County Kildare experienced population growth of 11.4%, an additional 25,270 persons (equivalent to the population of Newbridge). In this period, the county's population has grown at a higher rate than that of the State (+8.1%). Kildare has the fourth highest level of growth, marginally behind neighbouring local authorities in Fingal (+11.6%) and Meath (+13.2%).

Looking at a Municipal District (MD) level, it is evident most districts have experienced high levels of growth with some in excess of 10% since 2016. Over the past 30 years, rates of growth have been much higher in the north of the county. This trend has continued and the Naas MD along with the Clane-Maynooth MD have continued to experience the highest growth in the period between Census 2016 and 2022. The lowest growth was experienced in the Leixlip – Celbridge MD (+4.93%). This was partially as the result of a number of infrastructural constraints present in the area.

A review of the spatial distribution and growth trends across the county illustrates some interesting patterns and variances. Many larger settlements and environs within the portion of County Kildare located within the Dublin Metropolitan Area and Naas/Newbridge area have grown strongly since 2016 with all settlements experiencing an increase in population including Naas (+22%), Maynooth (+18%), Leixlip (+8%). However, Kilcock along with its environs (located in County Meath) has experienced the highest overall growth (+42%) during this period.

Aside from the north and east of the county, other settlements that experienced notable growth during this period include Kildare Town (+19%), Clane (+12%) Monasterevin (+25%) and Rathangan (+25%). In the south of the county, the key urban centre of Athy has continued to see strong growth of 14%. It is noted again that Celbridge has experienced the lowest growth (+2%) in this period, which was linked to some ongoing infrastructure constraints experienced in the town.



Table 1: Population Change 2016–2022 by Settlement (Census 2022)

Area/Settlement	2016	2022	% Pop. Change	% of Total Kildare Pop.
Naas – MD		46,011	17.1%	
Ballymore Eustace	873	689	–21%	0.3
Johnstown	1,005	1,320	31%	0.5
Kill	3,348	3,818	14%	1.5
Naas	2,1393	26,180	22%	10.6
Sallins	5,849	6,269	7%	2.5
Clane – Maynooth MD		66,412	13.7%	
Allenwood	981	1,685	72%	0.7
Clane	7,280	8,152	12%	3.3
Derrinturn	1,602	1,837	15%	0.7
Kilcock	6,093	8,674	42%	3.5
Maynooth	14,585	17,259	18%	7
Prosperous	2,333	2,413	3%	1
Kildare – Newbridge MD		67,237	11.4%	
Kilcullen	3,710	3,815	3%	1.5
Kildare	8,634	10,302	19%	4.2
Monasterevin	4,246	5,307	25%	2.1
Newbridge	22,742	24,366	7%	9.8
Rathangan	2,611	3,263	25%	1.3
Athy – MD		28,641	7.93%	
Athy	9,677	11,035	14%	4.5
Ballitore	793	667	–16%	0.3
Castledermot	1,475	1685	14%	0.7
Celbridge – Leixlip MD		39,473	4.93%	
Celbridge	20,288	20,601	2%	8.3
Leixlip	15,504	16,733	8%	6.8

Source: Census 2022

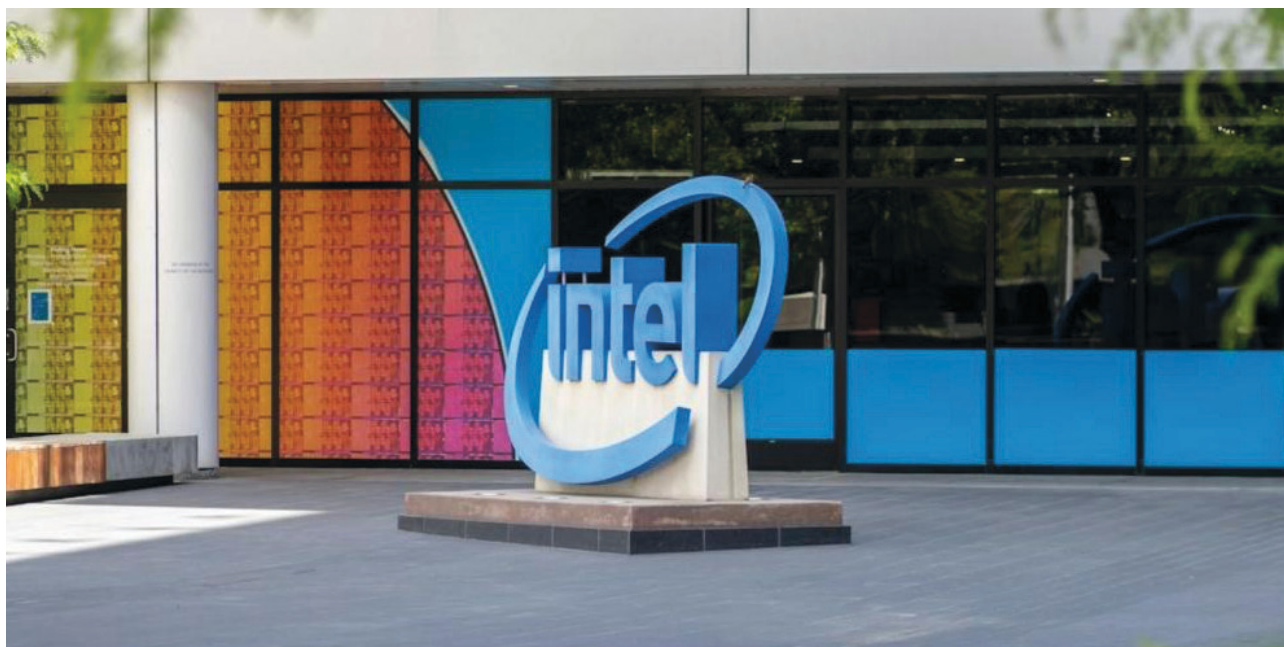
2.2 Workforce and Employment

The labour force participation rate⁷ recorded in Census 2022 for County Kildare was 63.7% which was higher than the State (61.2%). However, there are some noticeable spatial differences within. This figure has increased by 14.4% (+15,584) since 2016 with a labour force of 123,828. The highest labour force participation rates are located to the east and northeast of the county in Maynooth, Kilcock, Naas, Straffan, Sallins. Kilcock has the highest rate of any settlement with 10% points above (73.2%) the county value. The lowest participation rates (<55%) are predominantly in the south of the county.

Some 92.7% of the labour force in County Kildare were 'at work'⁸ which was the fourth highest rate in the State and the second highest of the Greater Dublin Area behind Dun Laoghaire Rathdown. The number of people in employment in Kildare had increased by +19.7% (18,882 persons) since 2016. Although there is a relatively high rate of economic activity, it does mask some differences across the region.

The jobs ratio provides a good indicator of the balance that exists between the location of the labour force and the location of jobs.⁹ According to Census 2022, the key towns of Naas and Maynooth have a high job to resident worker ratio (>0.82) which together accounted for 24% of jobs in the county. However, the highest jobs to worker ratio was recorded in Leixlip at 1.17. Although this is a positive metric, it highlights the importance of large employers such as Intel and its influence for the surrounding area. The Kildare County Development Plan 2023–2029 (as varied) suggests a sustainable jobs ratio figure for settlements in the county would be 0.7. This figure recognises Kildare's proximity to Dublin and the established commuting patterns that exist within many settlements across the county.

Kilcock and Celbridge both have the lowest job ratio figure (0.33) which is reflective of their status as commuter towns within the Dublin Metropolitan Area. Newbridge recorded the second highest workforce with a job to resident ratio of 0.66. At a high level, this contrast suggests there is an existing mismatch in terms of skill sets and job provision. In south of the county, Athy continued to have the highest unemployment rate (14.6%) with a low job to resident worker ratio of 0.58. Although economic activity and job opportunities in this settlement and surrounding Municipal District are limited compared to the north of the county, the statistics show that Athy is home to a large and growing resident workforce.



⁷ The Central Statistics Office defines the labour force participation rate as the number of persons in the labour force (employed or unemployed) expressed as a percentage of the total population aged 15 years and over.

⁸ An individual perceiving themselves as employed or self-employed regardless of their official labour market status, hours worked or income.

⁹ The term job ratio (employment to population ratio) relates to the number of jobs based in a settlement or area divided by its resident workforce; it does not factor in employees commuting in or out of the town to work. For example, a job ratio of 1 (or 1:1) for a town or area would mean that theoretically there is one job available for every resident worker. A jobs ratio of less than 1 means that a proportion of the resident workforce have to leave the area to go to a place of employment.

Table 2: Jobs, Resident Workers and Unemployment Rate by Settlement

Area / Settlement	Jobs	Resident Workforce	Jobs to Resident Worker Ratio	% of Jobs in Kildare	% Unemployment
Naas – MD					
Naas	11,960	12,726	0.92	14.9	6.2
Sallins	778	3,349	0.25	0.01	6.4
Clane – Maynooth MD					
Clane	2,094	4,028	0.52	2.7	6.4
Kilcock	1,335	4,364	0.31	1.7	6.5
Maynooth	6,898	8,406	0.82	8.8	5.4
Kildare – Newbridge MD					
Kildare	2,996	4,642	0.65	3.8	10.1
Monasterevin	1,443	2,410	0.60	1.8	9.1
Newbridge	7,337	11,099	0.66	9.3	9.3
Athy – MD					
Athy	2,460	4,256	0.58	3.1	14.6
Celbridge – Leixlip MD					
Celbridge	3,297	9,925	0.33	4.2	6.3
Leixlip	9,166	7,823	1.17	11.7	6.2

Source: Census 2022

2.3 Employment Types

Table 3 overleaf establishes the percentage breakdown of the types of jobs that exist in major settlements in County Kildare. Secondly, the table compares this figure with the percentage of resident workers in these settlements that are employed in that same job category. This data provides an illustration of the presence and extent of the jobs to employment mismatch within a settlement. For example, 62.7% of local jobs in Leixlip were recorded in the manufacturing sector but only 11.7% of the resident workforce were employed in this job type. This is due to the presence of Intel in the town which had five times the figure for its resident workers employed in manufacturing.

With regard to the Manufacturing sector, the county has a relatively consistent level of resident workers which is greater than the number of jobs available in each settlement. In terms of manufacturing workers, the settlements of Clane, Monasterevin and Celbridge have a high percentage of local residents engaged in this employment type which is much greater than the manufacturing jobs present within these settlements. Similarly, Maynooth has an overprovision of jobs in this sector relative to its resident manufacturing workers which is three times higher.

In relation to Wholesale/Retail and Transportation Jobs sector, the majority of settlements have a higher percentage of jobs relative to the resident workers in each settlement. Kildare Town is an outlier in this sector due to the scale and presence of Kildare Tourist Outlet Village (KTOV) and its high concentration of retail employment. Leixlip is the only settlement which would be considered to underprovide for this type of employment with almost three times the number of resident workers to jobs available.

An examination of IT Communications and Financial Services sectors, show all settlements in Kildare have a higher percentage of resident workers relative to the percentage of jobs in this sector. In this regard, County Kildare is deemed to have a skilled and well-educated workforce; however, it can be seen that some settlements underprovide in this job sector due to many jobs in this sector being located for the most part outside of the county and concentrated within Dublin City and suburbs. The towns of Leixlip, Maynooth and Newbridge have a higher percentage of resident workers employed in this sector relative to other towns, however the percentage of local jobs available is significantly low relative to their respective workforces.



Table 3: Percentage Breakdown of Job Sectors by Settlements in 2022

	Manufacturing Jobs	Manufacturing Workers	Wholesale/Retail and Transportation Jobs	Wholesale/Retail and Transportation Workers	IT and Communications, Financial Services Jobs	IT and Communications, Financial Services Workers	Public Administration Jobs	Public Administration Workers	Education, Human Health and Social Work Jobs	Education, Human Health and Social Workers
Naas	9.0	12.6	24.0	21.4	21.6	25.8	9.8	6.2	29.2	21.8
Clane	5.8	11.3	24.5	23.3	18.7	21.7	2.9	5.9	32.1	20.2
Kilcock	6.7	10.8	21.4	19.8	27.8	25.4	3.2	6.4	29.8	21.9
Maynooth	31.1	10.9	24.8	16.8	21.1	29.0	9.1	6.5	6.4	22.6
Kildare Town	10.5	12.1	44.2	28.7	14.6	19.8	2.8	6.7	17.7	14.1
Monasterevin	4.6	12.8	17.7	25.6	9.6	16.9	1.7	5.9	56.4	19.2
Newbridge	14.2	12.6	29.5	26.7	14.0	20.6	8.0	6.1	24.5	16.8
Athy	11.9	13.2	26.7	26.2	10.8	15.3	0.05	0.05	36.3	20.7
Celbridge	0.06	11.1	20.5	19.8	25.1	26.3	0.03	0.07	29.7	21.5
Leixlip	62.7	11.7	6.0	16.8	13.1	28.5	1.0	8.0	8.9	20.8

Source: Census 2022

Table 4 overleaf summarises the recorded change in employment of resident workers in County Kildare which saw an increase of 18,882 (+20%) over the last intercensal period between 2016 and 2022. With 30,921 jobs, Commerce and Trade accounted for the largest employment sector in 2022. Whilst this category covers a broad spectrum, it comprises such jobs as wholesale/retail and specialist financial practises that includes insurance, legal, real estate, engineering and scientific professions. During this period, the largest increase in job numbers have been experienced in the Transport and Communications (Warehousing/ Storage, Freight Transport) and Professional Services sectors. It is clear all sectors recorded steady growth during this period highlighting strong economic growth over this period.

Table 4: Trends in Resident Workforce of County by Job Sector 2016–2022

Resident Worker Employment Sector	2016 – 2022 Change in Resident Workers
Manufacturing	+20% (13,545)
Commerce and Trade	+21% (30,921)
Transport and Communications	+28% (10,565)
Professional Services	+24% (27,120)
Public Administration	+18% (7,300)

Source: Census 2016 and Census 2022

To gain a better understanding of the spatial distribution of this jobs growth across the county over the period between 2016 and 2022, Table 5 below provides a breakdown per sector within each settlement. An examination of the jobs in the Commerce and Trade sector, illustrates that the largest growth was experienced in Naas and Maynooth with Newbridge and Kilcock also showing increased numbers since 2016.

In terms of professional services jobs, a similar trend can be seen with the highest growth experienced in the settlements of Naas, Maynooth, Newbridge and Kilcock. With Naas also experiencing the highest growth in manufacturing jobs, other settlements such as Athy, Kilcock, and Newbridge saw significant growth in this period. Excluding Naas, the majority of jobs growth (4,167) in this particular sector is concentrated in the north-east of the county within the Dublin Metropolitan Area accounting for 32% of the jobs growth during this period. Naas continues to be the most attractive and primary employment location accounting for 21% of all job's growth.

Table 5: Distribution of Jobs Growth per Resident Workforce and Settlement 2016–2022

Employment Sector	2016 – 2022 Change in Resident Workers per Settlement									
	Naas	Clane	Kilcock	Maynooth	Kildare Town	Monasterevin	Newbridge	Athy	Celbridge	Leixlip
Manufacturing	39% (462)	18% (69)	54% (164)	37% (251)	36% (149)	58% (114)	13% (155)	44% (171)	3% (37)	4% (34)
Commerce and Trade	23% (690)	13% (121)	57% (430)	36% (583)	39% (387)	45% (193)	16% (433)	45% (319)	9% (233)	15% (274)
Transport and Communications	50% (455)	37% (97)	46% (137)	48% (298)	60% (147)	78% (83)	25% (199)	53% (106)	7% (65%)	13% (99)
Public Administration	29% (177)	27% (51)	46% (87)	38% (150)	26% (64)	73% (61)	1% (9)	33% (57)	3% (22)	7% (42)
Professional Services	37% (884)	24% (188)	57% (413)	25% (451)	41% (255)	197 (54%)	20% (399)	35% (275)	8% (186)	12% (211)

Source: Census 2016 and Census 2022

2.4 Skills and Experience

Table 6 below compares the level of educational attainment of residents living in the major settlements in the county relative to the qualifications of the people working in these areas. In relation to the overall percentage of residents with third level qualifications or above, settlements located within the Dublin Metropolitan Area and Naas are all above the Mid-East Region average of 40.9%. In other parts of the county, education attainment levels are lower, particularly within the towns of Athy and Monasterevin.

It is notable that the percentage of people with third level qualifications or above who are employed in jobs in each settlement is much higher in comparison to the resident population within these settlements who have obtained a third level qualification or above. This analysis identifies the contrast between the type of jobs available, and the necessary qualifications required to access these opportunities. In many cases, it illustrates that while some settlements provide sufficient employment opportunities, the required skill sets and qualifications may not be available locally. It also indicates high levels of commuting into these towns from outside areas.

Table 6: Percentage Population with Third Level Qualifications in 2022

Settlement	% Population over 15 with Third Level Qualification (Degree or Above)	% of Persons working in Settlement with Third Level Qualification (Degree or Above)	Ratio
Naas	46.6	62.5	1.3
Clane	40.5	59.7	1.5
Kilcock	43.7	66.7	1.5
Maynooth	56.5	72.2	1.3
Kildare Town	24.8	50.4	2.0
Monasterevin	24.3	59.5	2.4
Newbridge	30.4	53.0	1.7
Athy	21.6	56.7	2.6
Celbridge	42.9	67.3	1.6
Leixlip	41.6	70.9	1.7

Source: Census 2022



2.5 Commuting and Work

Looking at County Kildare as a whole, 41,688 residents commute outside the county to go to work on a daily basis, this has increased (+4,348) since 2016. Some 30% of these residents commute to Information Communications Technology (ICT), Financial and Professional Service jobs. This is followed by Education and Social related services which accounts for 21%. The private car still remained the dominant mode of transport for commuters in 2022, accounting for a very high figure of 72.5% with only 14.6% using public transport services.

Census 2022 recorded 53,489 people living and working in County Kildare in the Wholesale and Retail sector being the main employer accounting for 25% of all jobs in the county, followed by Education and Social services 22.3%. The private car remains the dominant mode of travel for these residents accounting for 70% of all journeys to work. County Kildare continues to be a strong employment region and inflow of workers (25,149) from outside Kildare which has increased by 3,954 persons since 2016.¹⁰ Although the county has a large resident workforce employed in manufacturing, the majority of workers travelling into Kildare relates to the manufacturing sector which may suggest the speciality nature and lack of skill sets required locally, including the ability of larger companies to attract workers from a wider region.

A review of the CSO POWSCCAR Census 2022 data as outlined in Table 7 below, confirms that all settlements have a net outflow of workers on a daily basis, reaffirming the county's commuting culture to other settlements in Kildare and other places of employment outside the county.¹¹ The table below illustrates significant trends and changes over the intercensal period in some settlements, with a high volume of residents employed in locations which are different to where they live. Leixlip is noted as being the only settlement in 2022 which has a net inflow of workers. This can be attributed to the specialist manufacturing site at Intel which was also undergoing significant expansion works at the time of the census. Celbridge continues to have the highest outflow of workers, followed by Newbridge and Kilcock, providing an indication of their entrenched role as commuter towns. While Naas had a net inflow of workers in 2016, it had become a town with a significant outflow of jobs by 2022. This highlights a significant shift where job creation did not keep pace with the strong population growth in the town during this period.

Table 7: Net Flow of Jobs by Settlement 2016- 2022

(+ is an inflow of workers, - is an outflow of workers)		
Settlement	2016	2022
Naas	+1,193	-1,036
Clane	-2,116	-1,934
Kilcock	-1,979	-3,029
Maynooth	-1,094	-1,148
Kildare Town	-1,354	-1,646
Monasterevin	-1,110	-967
Newbridge	-3,108	-3,762
Athy	-1,010	-1,796
Celbridge	-7,035	-6,628
Leixlip	-1,341	+1,343

Source: Census 2016 and Census 2022

¹⁰ Inflow of workers – persons travelling into a settlement for employment but living outside the settlement.

¹¹ Outflow of workers – resident workers travelling outside a settlement for employment.

To gain an understanding of the sectoral nature of jobs that County Kildare resident workers are commuting to outside the county, Table 8 below highlights the sectoral change and growth over the last intercensal period. The IT Communications and Financial Services sector is the largest exporter of resident workers out of the county accounting for 12,458 with a 17% increase since 2016. This sector requires skilled/educated workers and highlights the gap that exists in this type of employment provision.

Employment in the Education, Human Health and Social Work sector has also experienced a significant increase (16%) since 2016, accounting for 8,800 jobs. While manufacturing jobs attracted a high number of workers to the county in 2022, the number of residents that leave the county for this type of employment is low relative to other sectors. The results of the Census show however that it has seen significant growth overall in the number of resident workers leaving the county to go to work (+ 10%) since 2016 accounting for 4,782 jobs.

Table 8: Resident Workers Leaving County for Employment by Sector 2016–2022

Sector	2016	2022	Change
Manufacturing	4,366	4,782	416 (10%)
Wholesale / Retail Trade, Transportation	8,283	8,198	-85 (-1%)
IT and Communications and Financial Services	10,660	12,458	1,798 (17%)
Public Admin	3,478	3,686	208 (6%)
Education, Human Health and Social Work	7,594	8,800	1,206 (16%)
Total Workers			
(All Sectors)	37,340	41,688	4,348 (12%)

Source: Census 2016 and Census 2022

A detailed analysis of each settlement in terms of their respective economic role and commuting profile for both resident workers and local employment is outlined in the (Appendix A: Settlement Profiles). Each settlement profile provides an assessment of employment opportunities as of Census 2022, including the role specific sectors and industries play in the overall economic function of each respective settlement.



3

Employment Space Overview

This section examines the county's industrial/warehouse and office markets and takes a close look at the existing supply and spatial distribution, the quality of available stock and an assessment of current market and sectoral trends. The analysis and findings are derived from an audit undertaken by Kildare County Council, combined with a comprehensive overview of the market and supporting data compiled by commercial property experts Lisney.¹²

3.1 Employment Accommodation

3.1.1 Existing Stock

An audit completed by Kildare County Council in April 2023, found that there were approximately 1,200 enterprises operating in 25 towns/villages across the county. The majority of these enterprises (76%) are operating within industrial/warehouse type accommodation, with the remaining 24% of those surveyed operating within purpose-built office type accommodation. The assessment undertaken was based on the number of units/premises (rather than total floor area) allocating one unit per business name. At the time of the audit, a vacancy rate of 1.4% was identified for the county as a whole. This included nine industrial/warehouse units and eight office units being advertised and available. This figure and availability of accommodation is considered to be very low, particularly in the context of County Kildare given its strategic location proximate to Dublin and the competitive advantage associated with this. While a low vacancy rate can be a good indication of a stable and robust economy, it does have an impact on future investment and aspiring enterprises due to limited choice and affordability due to a combination of high demand and constrained supply.



¹² As per Action RE A1 of the Kildare County Development Plan 2023 – 2029 (as varied), an audit was carried out of all business / enterprise / industrial parks, as well as large one-off business locations, in County Kildare. The audit undertaken does not include retail space, above the shop commercial space or general main street floor space.

Looking at the county as a whole, Naas and the nearby Ladytown Business Park / Momentum Logistics Park accounted for the greatest amount (38.1%) of commercial space. This is followed by Maynooth (11.5%), Clane (8.9%), Athy (7.8%) and Celbridge (7.7%). Whilst most settlements in the county provide some element of commercial space, the north of the county accommodates the greatest concentration of units. In terms of office space, Naas and Maynooth have the greatest concentration of units accounting for 75% of all purpose-built accommodation in the county. Other settlements which also provide significant purpose-built office space include Sallins (9%) and Celbridge (7%). In relation to industrial/warehouse units, Naas and Ladytown have the greatest concentration (41%) of accommodation in the county, followed by Clane (11%) and Athy (10%). A full summary for each settlement and accommodation type is outlined in Table 9 below.

Table 9: Breakdown of Commercial Accommodation Type by Settlement/Environs

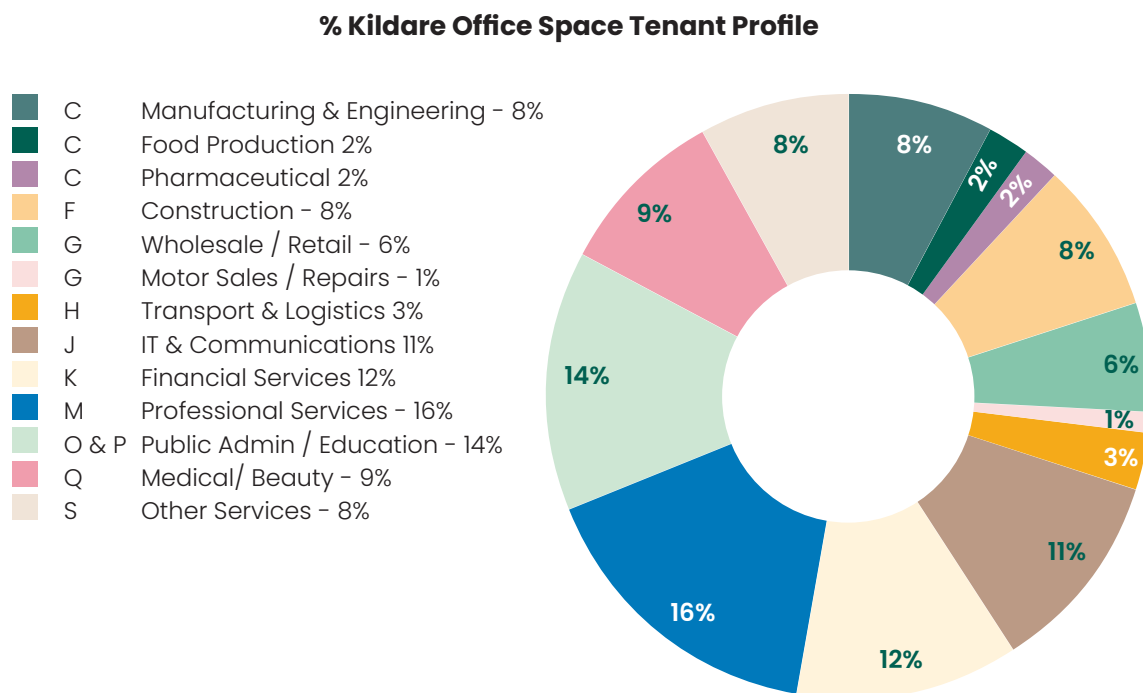
Settlement	Purpose Built Office Space	% of County	Industrial/Warehouse Space	% of County	Total Units	Settlement Proportion of County %
Naas	85	29%	206	23%	291	24.4%
Ladytown Environs	-		163	18%	163	13.7%
Maynooth	132	46%	5	1%	137	11.5%
Newbridge	1	0%	72	8%	73	6.1%
Leixlip	5	2%	20	2%	25	2.1%
Kildare Town	-	-	37	4%	37	3.1%
Athy	-	-	93	10%	93	7.8%
Celbridge	21	7%	71	8%	92	7.7%
Kilcock	-	-	5	1%	5	0.4%
Monasterevin	-	-	8	1%	8	0.7%
Clane	4	1%	102	11%	106	8.9%
Rathangan	1	0%	29	3%	30	2.5%
Sallins	26	9%	-	-	26	2.2%
Kilcullen	1	0%	33	4%	34	2.9%
Kill	7	2%	22	2%	29	2.4%
Castledermot	-	-	1	0%	1	0.1%
Derrinturn	-	-	4	0%	4	0.3%
Prosperous	-	-	1	0%	1	0.1%
Others	6	2%	31	3%	37	3.1%
TOTAL:	289		903		1,192	

Source: Kildare County Council (April 2023)

3.1.2 Profile of Office Space

Based on the audit carried out by Kildare County Council, a total of 289 individual office units were identified across the county. During the time (April 2023) of this survey, a total of 8 units were identified as being vacant and available indicating a vacancy rate of 2.8%. The vacancy rate is based on the number of units available to be occupied rather than quantum of floor space. To understand the type of industry occupying space, Figure 2 below provides an insight into the type of industry occupying this space by linking tenant profiles with NACE Rev 2 codes to illustrate a breakdown of activity and sector types.¹³

Figure 2: Kildare Office Space Tenant Profile

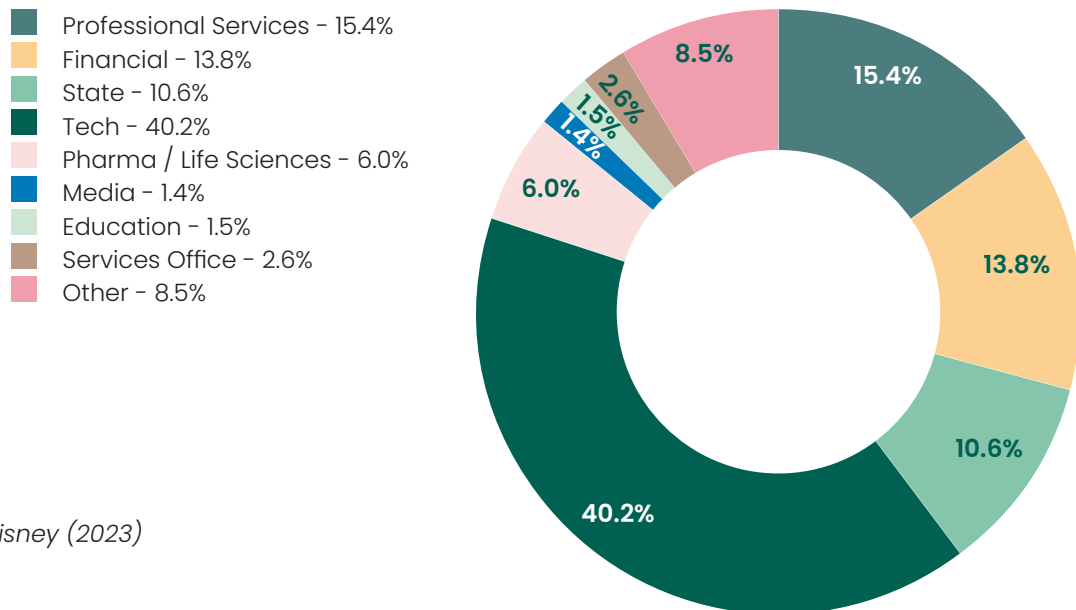


Source: Kildare County Council (April 2023)

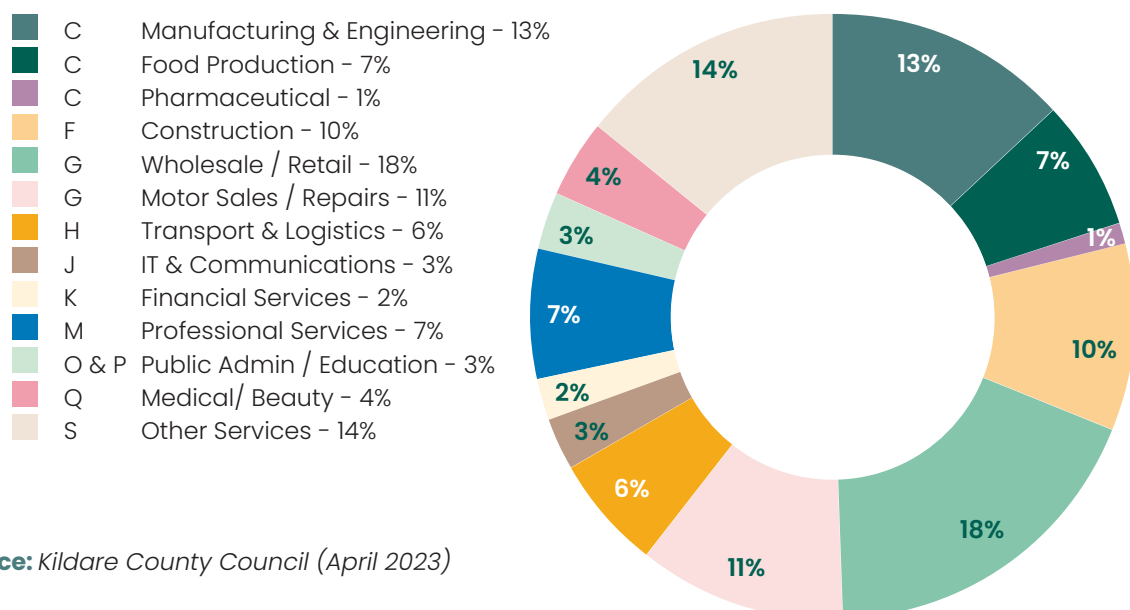
Figure 2 illustrates that sectors including Professional Services, Public Administration/Education, Financial Services along with IT and Communications occupy the greatest amount of office space in County Kildare, accounting for 53% of the total. To provide context, it is worth comparing this situation in Kildare with the sectors that have been active across the Dublin market over the past ten years (see Figure 3 overleaf).¹⁴ Not considering the location and quality of accommodation, the top four sectors that have occupied space in the Dublin market have been technology, professional services, financial services and the public sector (State and semi-state bodies), accounting for 80% of accommodation. Whilst this analysis may not directly align with the NACE codes used by Kildare County Council, it is noted that similar sectors make up the top four sectors in both areas. These sectors include those providing professional services such as legal and accountancy practices, public sector bodies and companies engaged in financial and technology industries. This is not the case in other regions. Using Cork's Metropolitan Area as a further example, it can be seen that while technology, professional services, and state bodies feature among the top four industry sectors in terms of the take-up of office space, financial services is absent. Instead, the pharmaceutical sector occupies the third highest sector for office take-up, accounting for 7%. This is due to the different economic context of Cork, where over recent years it has become an established international centre for pharmaceutical industry, due to Government policy and clustering.

¹³ NACE stands for 'Nomenclature statistique des activités économiques dans la Communauté' or 'statistical classification of economic activities' in the European Union. See [NACE Classifications List - CSO - Central Statistics Office](#) for further details and statistical classification of economic activities list.

¹⁴ The 'Dublin market' is a term used by Lisney to describe the market that primarily covers Dublin City Centre (Central Business District) and its immediate suburbs.

Figure 3: Breakdown of Dublin Office Take-Up by Sector (2014 – 2023)**Breakdown of Dublin Office Take-Up by Sector (2014 – 2023)****Source:** Lisney (2023)**3.1.3 Profile of Industrial and Warehouse Space**

The audit carried out by the Planning Department identified some 903 industrial/warehouse units across County Kildare. The county continues to be heavily dominated by warehouse/industrial type space and as noted in Section 3.1.1 supply is constrained, with only nine units identified as available at the time of survey. This provided a very low vacancy rate of just 0.9% for such spaces. Whilst this figure is based on the number of units rather than the overall quantum (in metres²) of vacant space, it does illustrate the high level of demand for this type of space. Figure 4 below provides a tenant profile which is linked to NACE Rev2 codes and the sectoral breakdown for industrial/warehousing space across the county.

Figure 4: Kildare Industrial/Warehouse Tenant Profile**Kildare Industrial/Warehouse Tenant Profile****Source:** Kildare County Council (April 2023)

3. Employment Space Overview

Figure 4 on previous page illustrates that the Wholesale/Retail, Manufacturing and Engineering, Motor Sales / Repairs and Construction sectors occupy the largest amount of industrial/warehouse units accounting for 52% of the total. To provide context and comparison, a review of the types of businesses that were most active across the Dublin market in the past ten years was carried out by Lisney. At a high level, the most active occupiers (both purchasing and leasing space) overwhelmingly comprise logistics operations and retailers accounting for 70% of activity in the Dublin market (based on quantum of space rather than number of units). This type of occupancy relates to large scale storage, distribution and manufacturing related uses. Although there is similarity with County Kildare and this type of use, it was noted in the audit undertaken by Kildare County Council that a significant proportion of wholesale/retail and service sector uses were located in areas such as Newbridge, Ladytown and Naas related to retail type businesses along with a diverse range of services ranging from gyms to places of worship. Traditionally associated with retail parks, shopping centres and town centre space, this trend suggests the cost and quality of accommodation in these locations to be competitive, resulting in non-traditional uses availing of cheaper space, the majority of which is located in edge-of-town and out of town locations.



3.2 Building Stock and Classification

An assessment of the existing stock of industrial/warehouse and office accommodation across the county, illustrated there are wide variances in terms of the overall age, specification and quality of the stock. This is similar to commercial property markets nationally. The evolution of the office and industrial/warehouse sectors across Kildare and Ireland stems from the 1960s and the start of Foreign Direct Investment (FDI) in Ireland. An analysis of certain industrial lands in Newbridge and Naas show that many of the earliest developments are either approaching or have indeed passed their intended lifespan.

3.2.1 Industrial Sector

With the establishment of the Industrial Development Authority (now IDA Ireland) in 1949, its overarching objective was to position Ireland towards a more open economic model and develop ‘*industrialisation by invitation*’ throughout the 1950s. The early 1960’s saw the first phase of purpose-built industrial/warehousing units around Ireland which were relatively small in size (less than 1,500sq. m) with low eaves heights (about 5 metres). The 1980’s saw limited development due to recessionary times resulting in a general oversupply of accommodation. From 1988 onwards, improved market conditions encouraged a range of new developments where the construction of industrial stock and specifications changed significantly with larger eaves heights and cleaner building lines becoming the norm.

The progression of industrial/business parks, particularly in the GDA, was driven largely by major infrastructural projects throughout the 1990’s, including the introduction of inter-urban motorways which saw significant investment at Ladytown and Intel choosing to locate its campus at Collinstown, Leixlip. Since the 2000s, more modern accommodation has been built with larger footprints, eaves heights of 12 metres and smaller ancillary office space. In Kildare, this range of development featured heavily in locations such as Ladytown, M7 Business Park (Naas), M4 Business Park (Celbridge), Link Business Park (Kilcullen) and Woodstock Industrial Estate (Athy) as examples. Due to resource constraints, it was not possible to inspect and survey all industrial properties across the county, however according to Lisney, approximately 75% of existing stock is of modern quality and acceptable standard to most occupiers (except those with bespoke needs). It is worth noting that units not built within the last six years do not meet the sustainability standards that are required in the near future. Building Energy Ratings (BERs) for existing stock are likely to range between B and D.¹⁵ A review of existing data from Lisney reveals that the remaining 25% of existing stock is older and sub-standard. While this space may be adequate for a certain cohort of local uses and smaller scale requirements, it will not be attractive to international investors and larger occupiers.



¹⁵ The BER rating scale is divided into categories from G (largest primary energy usage) to an A1 rating (lowest primary energy usage). Energy consumption is expressed in kWh per square metre of floor area of the building per year (kWh/m2/year) and CO2 emissions are expressed in kilograms of carbon dioxide per square metre per year (kgCO2/m2/year).

3.2.2 Office Sector

While purpose-built office space began to emerge in city regions of Ireland in the 1960's, in County Kildare the major office parks in Naas and Maynooth were only developed in the late 1990s and early 2000s. Apart from small pockets of recently built office schemes such as the Kerry Group headquarters in Millennium Park, most purpose-built stock (approximately 95%) in the county are considered to be Grade B or Grade C according to analysis carried out by Lisney.¹⁶ An examination of competing locations, Citywest and Park West in South Dublin illustrates that 69% and 100% of the respective accommodation in these areas are Grade B with no Grade C present.



3.2.3 Quality – Non-Domestic Building Energy Ratings (BERs)

While not all commercial buildings have had their energy rating accessed, those built, sold or leased since 2009 will have a BER Certificate. Recent analysis from Lisney and the Central Statistics Office (CSO) revealed almost 3,000 commercial properties in County Kildare have been accessed with a BER rating.¹⁷ Table 10 overleaf identifies a composition of ratings and grade between 2019 and 2022 along with national figures for context. County Kildare compares favourably when compared to the national average with 22% of properties falling into BER categories A and B, compared to a nationwide figure of 17%. While there is no national breakdown by county available, figures at a national level show that no commercial buildings constructed prior to 2005 have an A rating and just 5.7% of buildings constructed have a B rating. It can be generally assumed that County Kildare follows a similar pattern to national trends and overall market requirements.

¹⁶ Office space is generally graded A, B and C categories based on building quality, age, location and amenities. Grade A represents the highest quality in terms of design, modern (new or refurbished), centrally located buildings with premium facilities.

¹⁷ Commercial property refers to all non-domestic / non-residential premises. This may include other commercial uses such as retail, hospitality and specialised service types.

Table 10: BER – Comparable Data for Kildare and State

		County Kildare	Nationwide
Number of Properties Assessed (2019–2022)		2,947	72,579
Energy Rating:	A	5%	3%
	B1	2%	2%
	B2	5%	4%
	B3	10%	8%
	C1	11%	12%
	C2	11%	12%
	C3	9%	10%
	D1	10%	12%
	D2	8%	9%
	E1	5%	6%
	E2	5%	5%
	F	6%	7%
	G	12%	12%

Source: CSO and Lisney

3.2.4 Legislation Implications – Energy Performance of Buildings Directive (EPBD)

While it is important to analyse the energy performance of existing stock, it is critical to be aware of the various EU directives and consequential legislative changes that will greatly impact the commercial property market over the short, medium and long term. The EU's Energy Performance of Buildings Directive aims to specifically address the realignment and standardisation of the grading system of energy performance (BER rating) while setting targets for the upgrading of existing building stock. Based on the new rating system, the directive requires that the 16% worst performing commercial buildings across Ireland (and EU) must be renovated to a certain improved standard by 2030, with this obligation increasing to the 26% worst performing buildings by 2033. In summary, this means that slightly more than one in four commercial buildings will need to be upgraded over the next nine years consisting of all G, F, E and some D rated buildings. The practical implementation and regulation of this remains unknown, however the cost and impact of this on investors and businesses will be both substantial and consequential. Requirements from international investors and government bodies have stated they will no longer buy or lease commercial buildings where the BER is less than a B rating, and some not less than A rating. This shift change will likely spillover to the private investor and smaller enterprises occupying buildings which are less efficient, impacting values as the capital expenditure involved and penalties may need to be accounted for in the next 5-10 years.

Looking at the existing office and industrial/warehouse building stock in County Kildare, it is clear many units will need significant upgrading in the years ahead through various refurbishment works. It can be assumed in most cases that most of the Grade B office accommodation in areas such as Naas and Maynooth will no longer be attractive to large scale national and international occupiers. For these buildings to be viable options, owners will need to invest in refurbishment programs or otherwise be left with stranded assets. This could create a disadvantageous scenario for many owners with commercial assets that are too modern to justify further enhancements, but not modern enough to remain attractive to new occupiers. Now more than ever companies are seeking more sustainable, low carbon commercial space that are LEED certified, prioritising energy efficiency, water conservation and spaces with good natural light and air quality.¹⁸ For example, an examination of the Dublin market by Lisney, shows that the difference between prime and secondary rents was at 25%, however this has increased up to 35% over the last 2-3 years. While the upgrading of industrial/warehouse properties may be less in terms of cost and faster in terms of completion than the development of new build units, many investors may not be able to justify such investment.



¹⁸ LEED standing for Leadership in Energy and Environmental Design, is a widely used rating system for green buildings across the globe developed by US Green Building Council.

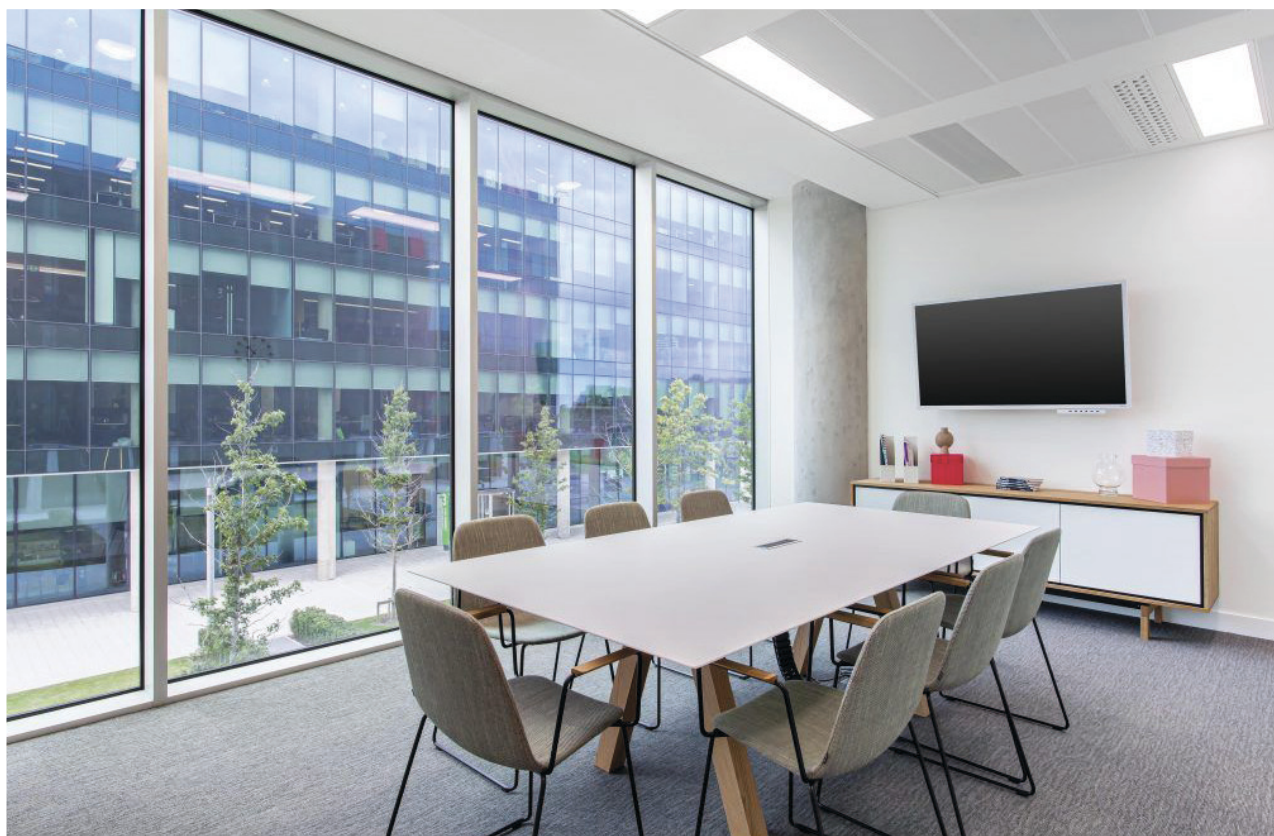
3.3 Market Trends

As with most large towns and urban areas across the country, demand and sentiment towards the commercial property market in Kildare's largest settlements remains strong, having continuously improved over the past decade. While there is a robust level of prevailing demand, supply and low vacancy rates across all property types remain extremely low in some key areas. This undoubtedly hampers future growth, limiting the marketability of County Kildare to future enterprises with little to no choice in the market. Excluding standalone developments, there has been little to no new purpose-built office, light industry/warehouse space constructed in the county over the past 15 years. This has the potential to hinder business expansion and the growth of new sectors seeking to locate within the Greater Dublin Area.

3.3.1 Rental Market

The rental market in Kildare has been very active in recent years, but most notably in the in 2021-2022 and in 2024 where demand for warehousing/logistical space grew as a result of the COVID-19 pandemic and the surge in e-commerce trade that followed. In the south of the county most demand has continued to stem from local enterprises with limited number of requirements from international and IDA supported investments. The Naas to Newbridge Strategic Economic and Employment Zone along the M7 Motorway has remained the preeminent location for warehousing/logistical space with demand stemming from a mix of regional and international occupiers with larger space requirements. High profile examples include the distribution centres of Lidl, Aldi and Primark, as well as Pfizer and KDP manufacturing facilities. Along the M4 corridor within the Dublin Metropolitan Area, high profile developments have included Intel in Leixlip, Lufthansa Technik in Celbridge and Musgrave in Kilcock. With flexible work practices now the norm and demand for prime city centre office space shifting, companies are continually seeking space within the Greater Dublin Area, but outside of Dublin city and suburbs where favourable terms are available.

Naas and Maynooth have the greatest quantum of purpose-built office stock which continues to attract the greatest demand. Space demands in these locations have stemmed from local/regional enterprises with some national and international requirements. Table 3.6 and Table 3.7 includes a breakdown of commercial lettings between 2019 – 2025 providing a snapshot of recent rental trends for industrial/warehouse and office markets in key settlements.



3.3.2 Industrial/Warehouse Leasing

In terms of lease duration, these vary significantly across the county with no overarching trend in terms of location, quality of building and rental level. As can be expected, newer larger buildings will generally attract the greatest demand and most favourable lease terms for landlords. In today's market, most landlords will seek leases guaranteeing a minimum term of 10+ years particularly for good quality units. Some of the larger 3PL occupiers are often willing to commit to 5 year leases to align with the length of contracts secured with their retailers/partners. A review of the commercial lease register as outlined in Table 11 (overleaf) shows that across the county the average industrial lease length in the period 2019–2025 was 8 years and 2 months. However, of the 126 lettings, 56 of these were for terms of five years or less, and 63 of these were for 10 years or more, including seven of 21 years or more. Leixlip, Kildare Town and Kill were noted as the only settlements to record an average lease length of 10 years or more during this seven year period, with an average of 9.3 years duration attributed to Naas. Whilst the north of the county would be deemed the most attractive location for such premises, the average lease length in settlements such as Maynooth, Newbridge, Celbridge, Clane and Kilcock ranged between 7 and 9.2 years.



Table 11: Average Industrial/Warehouse Lease Length in Years by Settlement (2019–2025)

	2025	2024	2023	2022	2021	2020	2019	Overall
Athy	4.1	7.5	3.0	5.0	4.0	4.0	–	4.0
Celbridge	4.8	1	14.7	4.8	–	–	8.3	9.2
Clane	10.0	4.75	–	4.0	10.0	–	10.0	7.0
Kilcock	–	10.0	–	7.0	8.3	–	–	8.0
Kilcullen	4.75	–	–	5.0	4.0	–	–	4.5
Kildare Town	–	–	2.0	–	10.0	20.0	–	10.7
Kill	–	–	–	–	15.0	–	–	15.0
Leixlip	–	–	–	–	10.0	–	13.5	12.3
Maynooth	–	5.0	5.0	10.0	10.0	7.4	7.9	7.9
Monasterevin	–	–	–	–	3.0	–	–	3.0
Naas (including Ladytown Environs and Sallins)	11.25	9.1	11.2	6.8	12.2	7.0	10.8	9.3
Newbridge	5.75	3.5	10.0	3.8	10.7	5.0	10.0	7.5
Rathangan	–	--	12.0	2.9	–	–	–	5.9
Overall:	8.4	6.7	9.1	5.2	9.9	8.6	10.4	8.5

Source: Property Services Regulatory Authority (2026)

In terms of prevailing market rental rates (Q1 2026) in the county, Lisney suggests purpose-built industrial/warehousing space ranges between €110 – €160 per sq. m (€10– €15 per sq. ft) depending on specification, location, condition, eaves height and size. Previously used good quality purpose-built units (with a BER of B, C, or High D) would typically achieve €130 per sq. m / €12 per sq. ft in today's market. In terms of viability and development, newly built units would be required to achieve a rent of €160 per sq. m / €15 per sq. ft or more to justify construction today. These rates outlined are similar to those achieved in South Dublin industrial parks such as Greenogue, Baldonnell and Citywest. Whilst the rents presented from the Property Services Regulatory Authority (PRSA) lease register may not provide a completely accurate picture (due to lack of full detail), it does show however that in the period 2019 – 2025 the average rent achieved for all industrial / warehousing premises in the county was €102 per sq. m / €9.50 per sq. ft which is considerably lower than is outlined above. In some cases, the upper level of the economic rental¹⁹ range approaches €160 per sq. m / €15 per sq. ft which is not viable of many local occupiers, but less of an issue for national and international occupiers.

¹⁹ Economic rent is defined as the level of rent at which the construction of a new development allows the developer to receive a return on investment accounting for variation in factors relating to construction costs, labour and land costs.

3.3.3 Office Leasing

Similar to warehouse and industrial space, office leases executed around the county vary significantly showing no overarching patterns. Lisney have reported that most office landlords will be seeking minimum lease terms of 10+ years particularly when it comes to new quality stock. The PSRA commercial lease register outlined in table 12 below shows the average office lease duration in the period 2019–2025 was 8.1 years. However, of the 184 office lettings recorded, 100 were for terms of 5 years or less and 84 were for 10+ years or more (including 12 for 20+ years or more). In this period, Kill was the only settlement that recorded an average lease of 10+ years or more during this 7-year period with key locations such as Leixlip (9.1 years), Naas (8.5 years) and Maynooth (7.3 years) being much lower.

Table 12: Average Office Lease Length in Years by Settlement (2019 – 2025)

	2025	2024	2023	2022	2021	2020	2019	Overall
Athy	–	–	3.0	6.0	10.0	–	–	6.3
Celbridge	8.0	5.5	6.7	–	–	–	4.8	6.9
Clane	3.0	–	5.3	3.0	–	10.0	–	4.9
Kilcock	–	–	1.0	–	10.0	–	–	5.5
Kilcullen	7.5	8.7	–	–	5.0	–	10.0	8.0
Kildare Town	5.0	7.5	–	5.5	5.5	10.7	17.8	8.8
Kill	–	20.0	–	7.4	–	–	–	10.5
Leixlip	10.0	–	–	10.0	10.0	–	7.4	9.1
Maynooth	5.6	2.0	9.9	7.1	5.0	5.6	13.4	7.3
Naas (including Ladytown Environs and Sallins)	7.5	8.1	7.1	9.2	5.7	7.9	7.1	8.5
Newbridge	7.5	1.0	5.0	5.3	10.8	15.0	7.4	9.0
Overall	7.1	9.9	7.2	7.6	7.2	8.5	10.0	8.1

Source: Property Services Regulatory Authority (2026)

In terms of prevailing market rental levels (Q1 2026) for purpose-built office space in key locations such as Naas and Maynooth, Lisney suggests levels range between €183 – €215 per sq. m (€17– €22 per sq. ft) depending on specification condition and size. For a developer to consider a new office scheme, an economic rent would be required in excess of €377 per sq. m (€35 per sq. ft) would likely be sought to justify development in today's market (Q1 2026). This is a similar figure to the economic rent required in suburban locations in Dublin such as Citywest and Blanchardstown. This figure is moving quickly towards €430 per sq. m / €40 per sq. ft.

For context and looking at current schemes built such as Millennium Park in Naas, the PSRA commercial register shows rental rates circa €215 per sq. m (€20 per sq. ft) which is much less and almost two decades old. This presents a significant gap between what is achievable now and what is expected for new schemes to go to construction. Most developers in the current economic climate are unlikely to build on a speculative basis and will require an agreement for lease/pre-lease in place before commencing any construction.

3.3.4 Sales Market

Lisney has reported that rental market trends follow through to the sale of office and industrial/warehousing accommodation. There has been notable activity in this space in recent years, both by owner-occupiers and investors seeking a building with a fixed lease and tenant in place. Despite the lack of data in terms of vacant possession sales, it is believed capital values for office space would generally range between €5,400 – €6,500 per sq. m (€500 – €600 per sq. f) for vacant properties. In terms of industrial/warehouse space, values are expected to be in the range of €2,424 – €3,230 per sq. m (€225 – €300 per sq. f) to justify construction. In the present climate, investment sales in commercial property markets will very much be dependent on the lease structure and a strong competitive rental level being secured.

3.3.5 Land Values

The development land market across Kildare and Ireland has been challenging in recent times due to the rise in construction cost inflation (materials and labour) coupled with elevating financial costs which has greatly impacted the viability of commercial and even residential schemes. These uncertainties have led to reduced activity levels including land values for sites without planning permission. However, it is hoped that planning reforms being undertaken with the introduction of the new Planning and Development Act 2024, and a general decrease in construction inflation from the immediate Post-COVID period should help to alleviate some barriers to activity and demand for viable land options going forward. While residential zoned land attracts the most attention in today's market, employment lands tend to vary in price considerably depending on the zoning policy, location, accessibility and planning history.

Analysis from Lisney indicate that the prevailing value of industrial/warehousing lands around North Kildare including Naas, Newbridge to be approximately €350,000 – €375,000 per acre (€865,000 – €925,000 per hectare) and rising closer to €400,000 – €420,000 per acre (€990,000 – €1,040,000 per hectare) for sites suitable for office type development. In the south of the county, values in areas such as Kilcullen and Athy are lower with industrial/warehousing at €250,000 per acre (€615,000 per hectare). There is currently limited opportunity or demand for office type accommodation in south Kildare, however Lisney found that such lands could achieve similar values to that of industrial/warehousing, perhaps with a small premium.



3.3.6 Hubs and Co-working Facilities

With changes in work practices and new hybrid models now encouraged by employers, the demand for flexible desk space with flexible terms has become an increasing trend in Kildare. There are currently 15 hubs, co-working spaces and innovation centres in various locations outlined in Table 13 overleaf. These centres include all facilities and utilities with dedicated desk space and prices ranging from €400 - €600 per month. These hubs provide property solutions for smaller scale enterprises in the absence of direct letting availability. Table 14 outlines two future innovation hubs and co-working facilities at various stages of development. These projects aim to provide a dedicated space for entrepreneurial and education excellence with each location building on their long and fine history in specific sectors such as fashion and textiles, whilst also providing support and skills for local businesses transitioning to a circular economy.



Table 13: Hubs and Co-working Spaces in County Kildare

Settlement	Hub
Naas	Premier Business Centres – The Osprey
	MERITS, Devoy Quarter
	County Kildare Chamber iHub
Maynooth	Digital Office Centre – Maynooth Business Campus
	MaynoothWorks, Maynooth University
Newbridge	Newbridge Business Centre
Kildare Town	The National Equine Innovation Centre (NEIC)
Allenwood	ACDAL Remote Working Hub
Clane	Clane Project Centre
Ballymore Eustace	The Hub – Market Square
Crookstown	Venture House
Leixlip	Business Barn
Athy	Athy Community Enterprise Centre
	Athy Food, Drink and Skills Innovation Hub
Rathangan	Rathangan Community Centre

Source: Kildare County Council (2026)

Table 14: Future Innovation Hubs and Co-working Spaces in County Kildare

Settlement	Hub	Expected Completion
Monasterevin	Monasterevin Fashion and Textile Design Hub	Q3 2026
Athy	Circular Economy and Regenerative Business Centre	Q3 2026 (Phase 1)

Source: Kildare County Council (2026)



3.4 Data Centres

Kildare County Council recognises the value that data centre development can contribute to job creation during construction, maintenance and potential synergies in areas such as R&D, data analytics, customer service, technical support and the spin-offs that can occur. There is significant global demand for data centre accommodation given the changing nature of work practices and the international trend of businesses and organisations moving to cloud-based data servers, rather than on-site servers. Added to this is the well-documented increased use of social media, Artificial Intelligence (AI) and e-commerce, all of which require data storage and robust digital-based infrastructure.

To provide context, there are five core (Tier 1) European markets for data centres known as FLAPD markets which include Frankfurt, London, Amsterdam, Paris and Dublin. These markets are increasingly reaching their capacity limits leading to higher prices and strong demand for Tier 2 suburban locations. There are a number of data centre types such as 'Edge' (small data centres covering local needs), 'Enterprise' (IT infrastructure for a business), 'Telecom' (Telecommunication infrastructure), 'Co-location' (renting of server room capabilities) and 'Hyperscale' (large data centres, especially for cloud applications). In Ireland most data centre types are colocation (Digital Reality, Keppel, Equinox) and hyperscale (Amazon, Apple, Meta, Google and Microsoft). A report by Bitpower in Q4 2024 noted there were approximately 92 data centres in Ireland with a further 14 under construction.

3.4.1 Data Centre Requirements

In November 2021 the Commissioner for the Regulation of Utilities (CRU) announced a de facto moratorium on new data centres in the Dublin Region stating the need for limits on new sites until 2028. This announcement also followed by Eirgrid (State-owned electric transmission operator) stating its future capacity outlook report that future connections and offers being made will be based on system capacity and its reliability on a case-by-case basis. In December 2025, the CRU published a final decision providing greater clarity and direction with strict criteria for new facilities seeking connections. Going forward, all new data centres with a capacity of 1MVA or more must prove that at least 80% of their annual electricity demand is met by renewable energy projects located within Ireland.²⁰ The Irish Government's position on data centres seeks to secure the economic benefits of being a global technology hub enabling a range of sectors to consider future expansion and investment in Ireland.



²⁰ A 1MVA Data Centre represents a small-medium sized facility between 5,000–20,000 sq. ft, capable of hosting 500–2,000 servers.

To coincide with the CRU's decision, the government have in January 2026 published the Large Energy User Action Plan (LEAP) which seeks to locate new large energy demands near renewable energy sources in a plan led approach.²¹ The plan also seeks to identify future strategic green energy parks which will focus on the most energy intensive sectors (i.e. data centres, semiconductors and life sciences) with plan-led sites which can support investment in renewables and effective grid utilisation. The identification of future landbanks and geographical areas will be consistent with the approach set out in a forthcoming National Planning Statement.

All new data centre developments have specific locational and land requirements to ensure there is no interruption of services, potential expansion opportunities, availability of power and no risk of adverse weather conditions such as flooding. Data centre specialists Linesight outline four pillars in the identification of strategic data centre location²², as follows:



Proximity to Customer Markets

For co-location and hyperscale facilities, this is crucial for enhanced connectivity.



Environment and Sustainability

Concerns about the environmental footprint have led to innovations in design, such as the integration of natural water filtration systems.



Energy Costs and Availability

The push towards greener and renewable energy sources is changing the construction and operations of data centres. Certain operators are exploring renewable energy projects and infrastructure to support the green transition.



Local Regulations

Cutting through red tape can significantly impact the speed and cost effectiveness of data centre projects. Locations where such development has been successful is considered the preferred location due to precedence.

In terms of cost and delivery, a report from Mitchell McDermott in January 2026 suggests the development of a data centre (white space spec) is between €12 – €14 million per MW, with a 110KW substation costing a further €14.5 – €19 million.²³ Costs for this nature of development have significantly increased in recent years. In terms of outlook for the sector, significant demand for modern data centres is likely to come with many North American technology firms reporting an appetite to expand footprints ensuring their needs are met going forward. With the future of AI and its specific data requirements yet to emerge in any significant way, it is reported that power and infrastructure required to facilitate this growth and subsequent technology sectors could almost double by 2030.

If Kildare sees data centre development as a future corporate goal and economic target, the county should be placed favourably to attract new investment and associated growth from emerging sectors considering its proximity and economic role within the Greater Dublin Area.

²¹ <https://enterprise.gov.ie/en/publications/publication-files/leap-large-energy-user-action-plan.pdf> (accessed: 05/05/2026)

²² <https://www.linesight.com/insights/decoding-site-selection-the-top-four-considerations-for-building-data/> (accessed: 05/05/2026)

²³ See <https://mitchellmcdermott.com/wp-content/uploads/2026/01/Data-Centres-Infocard-2026.pdf> (accessed: 05/05/2026)

4

Land Use Zoning

To provide a comprehensive context, this section examines the existing land use zonings within each settlement to determine the extent of land identified for employment generating purposes. It also assesses the spatial distribution of these employment areas and identifies the quantum of undeveloped land currently available for future investment.

4.1 Existing Context

Looking at County Kildare as a whole, there are many employment areas in a number of settlements which would be defined as strategic locations due to the presence of large-scale multinationals and foreign direct investment (FDI) interests, including a diverse range of small-medium scale enterprise locations home to a mix of established employers.

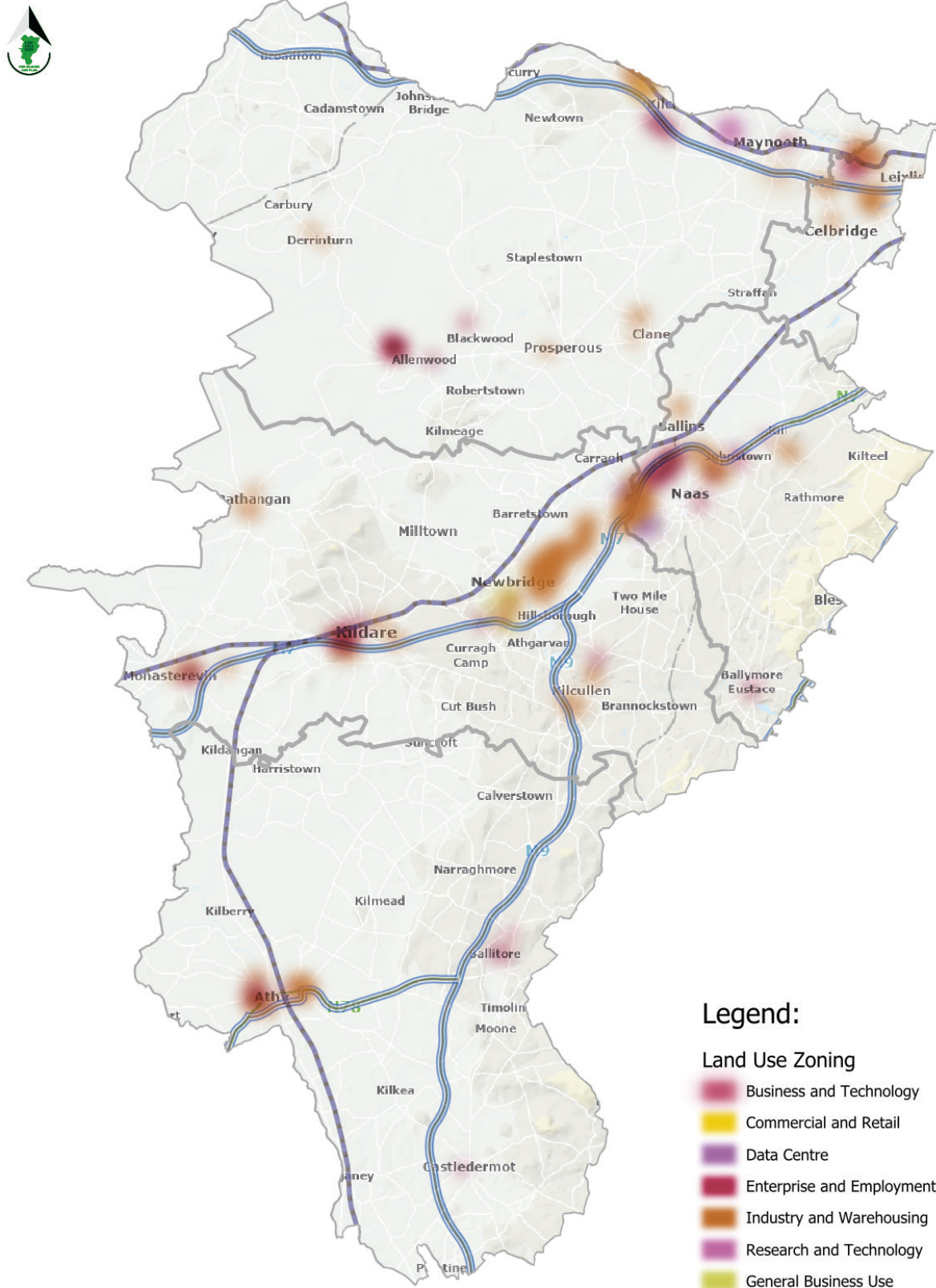
Kildare is fortunate to host a number of large standalone employment sites in sectors such as pharmaceutical, specialist manufacturing and logistics/distribution, some in isolation and others forming part of larger clusters. As noted in Section 3, the county currently contains a significant number of enterprise/industrial parks in a range of settlements, all of which contribute positively towards employment opportunities for both Kildare and also the wider hinterland. Figure 5 overleaf highlights the spatial distribution of zoned employment lands across County Kildare, including the type land use zoning classification.



Figure 5: Spatial Distribution of Employment Zoned Land in County Kildare

Employment Zoned Land

 **Comhairle Contae Chill Dara**
Kildare County Council



4.2 Employment Zoning Designations

Land use zoning objectives contained in the Kildare County Development Plan 2023–2029 (as varied), local area plans and settlement plans comprise mainly of ‘H: Industrial and Warehousing’ designation which seeks to facilitate manufacturing, industrial, distribution and warehousing uses. The other designation relates to ‘Q: Enterprise and Employment’ which seeks to facilitate office type development or specialist sectors such as business, financial and technology that have the potential for a high quantum of employment creation. Local area plans for Naas and Maynooth have identified lands for specialist development that can support future synergies relating to Research Development and Innovation (RD&I) and emerging technology sectors adjacent Maynooth University, as well as the identification of lands for future data centre development on the outskirts of Naas.

Whilst it is acknowledged that tailored policy responses to locational specific circumstances is important, it is noted that there is evidence of a lack of consistency across land use plans in the county where the two dominant zoning classifications (H and Q zoned lands) are accompanied by a wide variety of varying objectives and conditions which have been applied to specific sites in different settlements. This may be considered in certain instances as being restrictive from a development perspective and type of sector being targeted. The new Planning and Development Act 2024 (as amended) aims to significantly streamline the development plan making process by extending their lifespan to 10 years, thereby providing long term certainty and strategic alignment. The preparation of the next development plan will enable a thorough review of existing zoning policies at settlement level, creating the opportunity to develop a more consistent and coherent framework of land use objectives to frame the future economic vision for the county under one statutory plan.



4.3 Strategic Overview

A review carried out by Kildare County Council in November 2025, identified a total of 1,528.97 ha of zoned employment land in County Kildare with 49% located in the Naas to Newbridge Strategic Economic and Employment Corridor and 26% of this land situated in the northeast of the county within the Dublin Metropolitan Area. Of this zoned land, 71% falls under the broad category of 'H: Industrial and Warehousing' and 20% zoned for 'Q: Enterprise and Employment'. 9% of this land is zoned for specific data centre development in Naas, including research and technology enterprises seeking to develop adjacent Maynooth University.

Today, 52% (791.55 ha) of land zoned land is currently developed with approx. 84% (667 ha) of this classified as H: Industrial and Warehousing and 16% (125 ha) classified as Q: Enterprise and Employment use. There is currently a high concentration of industrial and warehouse type uses developed at Naas, Ladytown and Newbridge locations accounting for 24% (365 ha) of the county's employment land currently zoned. This area includes a significant cluster of industrial estates, enterprise parks and standalone large scale employment sites. Formerly Ladytown/Toughers, the rebranded Momentum Logistics Park has now become an internationally recognised location for logistical and distribution enterprises extending to 93 ha and is almost at capacity in terms of undeveloped zoned land.

In the north of the county, Leixlip and Celbridge currently accounts for 15% (232.86 ha) of zoned land which comprises three strategic employment sites in Intel, Collinstown Lands and the redeveloped Kildare Innovation Campus (the former Hewlett Packard lands). The Intel Ireland site holds international significance due to its scale, global brand and level of employment it provides to the regional economy. The Kildare Innovation Campus will soon become the leading deep tech and innovation campus for sectors such as artificial intelligence, robotics and quantum computing with the delivery of new deep tech facilities and supporting data centres. These employment locations have the potential to position Kildare as one of the leading locations in Ireland and Europe for future inward investment.

Athy is the sole employment centre in the south of the county which currently accounts for 6% (93.12 ha) of the land zoned for employment use. There is currently 65 ha of land zoned for industrial and warehouse use with 28 ha of land zoned for enterprise and employment purposes. 63% of this land in use is heavily dominated by long-standing industrial and manufacturing industries and currently does not contain any purpose-built office type development. Excluding Athy, the south of the county does not contain any employment zoned lands of significance within the various settlement boundaries, highlighting the importance of Athy and its economic function for the region.



Table 15: Breakdown of Zoned Employment Land in County Kildare, Apportioned by Settlement and Municipal District

Area/Settlement	H lands (ha)	Q lands (ha)	P lands (ha)	Total	% of County
Athy - MD	65.23	41.6		106.83	7%
Athy	65.23	27.89		93.12	6%
Ballitore		11.97		11.97	1%
Castledermot		0.7		0.7	0%
Crookstown		1.04		1.04	0%
Celbridge - Leixlip MD	175.58	57.28		232.86	15%
Celbridge	21.91			21.91	1%
Leixlip	153.67	57.28		210.95	14%
Clane - Maynooth MD	104.81	81.62	44.68	231.11	15%
Allenwood		37.06		37.06	2%
Coill Dubh		2.84		2.84	0%
Clane	14.2	5.86		20.06	1%
Derrinturn	2.75			2.75	0%
Kilcock*	68.26	32.7		100.96	7%
Maynooth*	16.93	3.16	44.68	64.77	4%
Prosperous	2.67			2.67	0%
Kildare - Newbridge MD	468.08	72.65		540.73	35%
Kilcullen	19.04	4.17		23.21	2%
Kildare Town	40.28	53.63		93.91	6%
Ladytown Environs	93.14			93.14	6%
Monasterevin	21.01	12.17		33.18	2%
Newbridge*	282.21	2.68		284.89	19%
Rathangan	12.4			12.4	1%
Naas - MD	274	50.18	93.26	417.44	27%
Ballymore Eustace		1.34		1.34	0%
Johnstown		4.87		4.87	0%
Kill	17.32	0.68		18	1%
Naas*	238.05*	43.29	93.26	374.6	25%
Sallins	18.63			18.63	1%
Total:	1,087.7	303.33	137.94	1,528.97	
	71%	20%	9%		

* All Land Use Zoning assessments include lands zoned (T: Mixed Use, Naas), (GU: General Use, Newbridge) and (R: Commercial and Retail, Kilcock) which are deemed appropriate for industry and warehousing uses as part of this study. Land zoned (T: General Development, Maynooth) has been excluded from this data due to existing development.

Q: Enterprise and Employment zoned lands aim to provide high job generating uses which would indicate a focus towards office type development. Of the 303.33 ha of land zoned for this use, 41% has been developed with a mix of office parks and standalone enterprises for manufacturing and industrial purposes. Naas currently has the highest proportion of land (31 ha) developed for specific office type development, followed by Maynooth which contains one site of 15 ha. Whilst there are a number of settlements with lands developed under this designation, the majority do not contain purpose-built office accommodation. The Dublin Metropolitan Area (DMA) currently holds the strongest infrastructure with direct transport links to Dublin City and its suburbs, however Leixlip, Celbridge and Kilcock (which are all located within the DMA) have no purpose-built office development which highlights an opportunity considering the region's socio-economic indicators.

There is currently 41.6 ha of 'Q' land zoned in the south, with 27.89 ha of this land located in Athy. The remaining 14 ha is spread across smaller settlements containing standalone manufacturing and agricultural enterprises. Although Athy accounts for 9% of 'Q' lands in the county, no purpose-built office schemes have been developed in the town to date. For context, Table 15 on the previous page breaks down the existing zoning classifications by settlement and their overall relationship to the municipal district and the county as a whole.

4.4 Available Zoned Land (Undeveloped)

Table 16 below summarises the quantum of undeveloped zoned land currently available for employment purposes in the county. The table provides a breakdown of the land use classification and the quantum of land available presenting a high-level vision of potential development type to facilitate growth targets in Kildare. There is currently 737.42 ha of zoned land available having regard to the Kildare County Development Plan 2023 – 2029 (as varied), current local area plans and settlement plans.

Table 16: Summary of Zoned and Undeveloped Employment Land in County Kildare

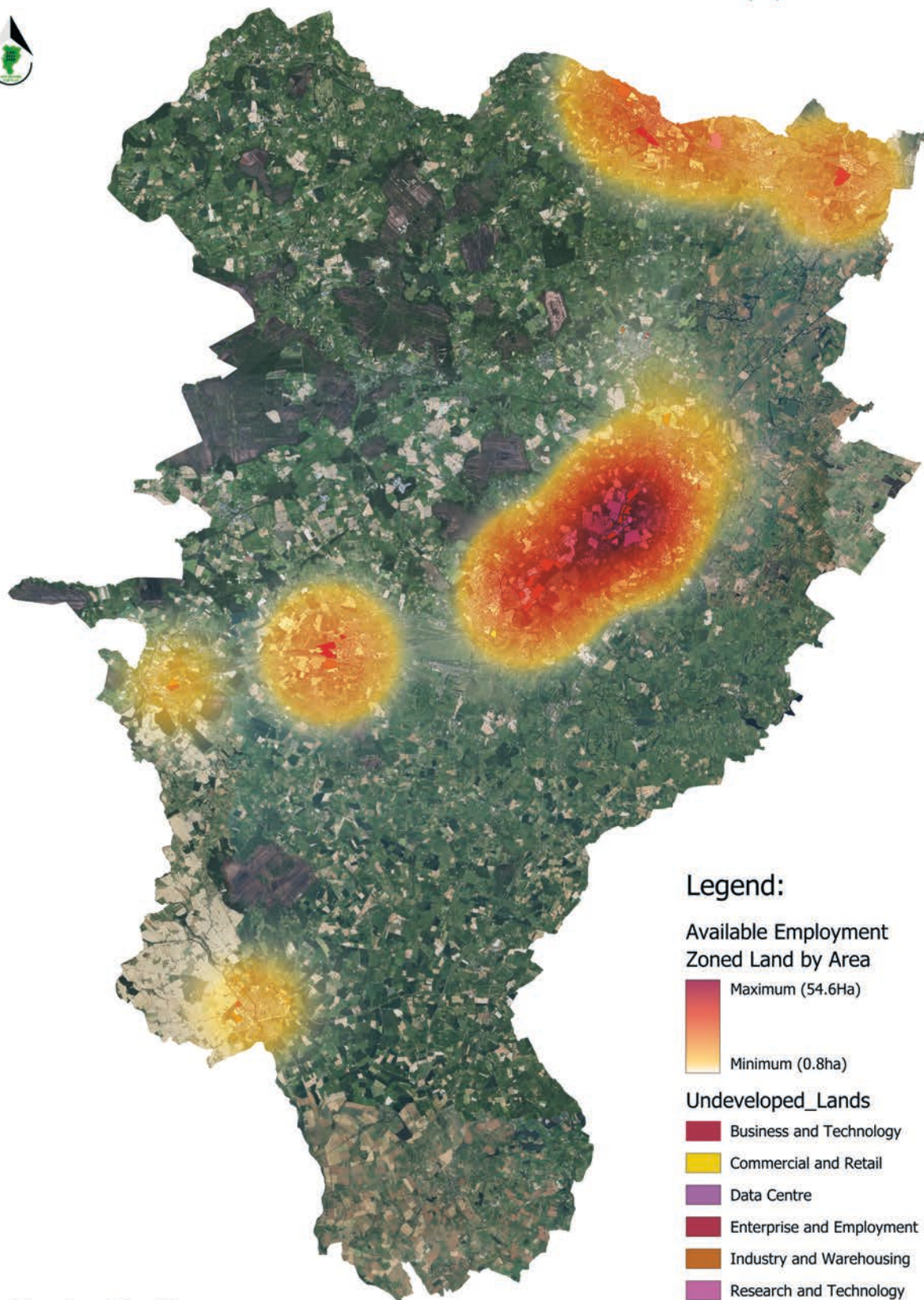
Zoning	Total Zoned Land (Ha)	Available Zoned Land (Ha)	% of Land Available
Industry and Warehousing (H)	1,087.7	421.1 ²⁴	39%
Enterprise, Employment and Technology (Q)	303.33	178.38	59%
Data Centre (P) Naas LAP	93.26	93.26	100%
Research and Technology (P) Maynooth Joint LAP (Maynooth, County Kildare)	44.68	44.68	100%

There is currently 1,087.7 ha of land zoned for Industry and Warehousing (H) which accounts for 71% of employment land in Kildare, of this there is currently 38% (421.1 ha) currently available to cater for future development. Enterprise, Employment and Technology (Q) land use accounts for 20% with 59% (178.38 ha) available for future development. These figures highlight the county's historic reliance on industrial and warehouse type activities and associated supporting facilities. Kildare has positioned itself to facilitate future data centre development in Naas with 92.34 ha identified. Maynooth currently has 44.32 ha identified for Research and Technology on lands adjoining Maynooth University which seeks to facilitate a campus style development with the potential to harness and attract future investment and synergies from sectors and start-ups in R&D, technology, life science and innovation sectors. Figure 6 overleaf highlights the spatial distribution of available zoned land across the county. This map shows a high concentration of undeveloped land currently in Naas and along the Naas to Newbridge Strategic Economic and Employment Zone.

²⁴ Includes lands zoned (T: Mixed Use, Naas), (GU: General Use, Newbridge) and (R: Commercial and Retail, Kilcock) which are appropriate for industry and warehousing uses.

Figure 6: Spatial Distribution of Available/Undeveloped Zoned Employment Land in County Kildare

Available Zoned Employment Land



Legend:

Available Employment Zoned Land by Area



Undeveloped_Lands

- Business and Technology
- Commercial and Retail
- Data Centre
- Enterprise and Employment
- Industry and Warehousing
- Research and Technology
- General Business Use

2.5 5 7.5 10 km



4.5 Settlement Analysis

Based on the settlement level analysis outlined in Table 17 overleaf, it is evident Naas is currently in the strongest position to facilitate significant economic investment and future jobs growth accounting for 29% of available land. This is followed by Newbridge which accounts for 17% of future land available, followed by Kilcock (12%), Kildare Town (10%), Maynooth (7%) and Leixlip (6%). This indicates a clear picture that the centre and north of the county are currently best placed to facilitate the largest growth in the short term.

Ladytown Environs incorporating both Ladytown Business Park and Momentum Logistics Park is currently one of the largest employment locations in Kildare with international appeal in terms of its strategic location, however it is worth noting that only 16.8 ha of land is currently available with extant permission (see Appendix A – Ladytown Environs) for 8.98 ha of pipeline development. Considering the level of take-up and sectoral growth in the location, including the type of accommodation required the remaining quantum of land will be constrained in terms of its potential to attract large-scale investment and job opportunities in the short-medium term. In the north of the county, Celbridge currently has no employment zoned land available with the remaining site option on site and under construction to deliver a series of warehousing solutions. When we consider the socio-economic profile of Celbridge, it shows a highly skilled and professional resident workforce, of which 57% commute out of the county for employment. To reverse this trend and take advantage of its proximity to Dublin, the amount of land available, type and location will be key to the town's economic growth and ability to provide 'live and work' communities.



4. Land Use Zoning

Whilst Athy is the main employment centre in the south of the county it only accounts for 5% of future available land. Although the current level of available land may seem sufficient in terms of quantum, given the new distributor road and improved infrastructure links to Dublin which have been developed over the past number of years, the town is now in a better position to attract a range of new and emerging sectors. Although there appears to be a significant quantum of land available across the county, the location, profile and feasibility of sites in each settlement will require further assessment, including a review of their potential to support tangible investment opportunities for new enterprises and associated local jobs growth.

Table 17: Available and Undeveloped Employment Zoned Land by Settlement/Environs

Settlement/ Environs	'H' Zoned Lands (in ha)	%	'Q' Zoned Lands (in ha)	%	'P' Zoned Lands (in ha)	%	Total Undeveloped Lands (in ha)	% of Total
Allenwood	0	0%	8.93	5%			8.93	1%
Athy	29.17	7%	6.04	3%			35.21	5%
Ballitore	–	0%	6.03	3%			6.03	1%
Celbridge	–	0%	0	0%			0	0%
Clane	4.62	1%	2.41	1%			7.03	1%
Derrinturn	2.36	1%	–	0%			2.36	0%
Kilcock	54.79 ²⁵	13%	32.7	18%			87.49	12%
Kilcullen	11.86	3%	2.14	1%			14	2%
Kildare	26.66	6%	46.6	26%			73.26	10%
Ladytown Environs	16.8	4%	–	0%			16.8	2%
Leixlip	0	0%	46.8	26%			46.8	6%
Maynooth	2.12	1%	2.29	1%	44.68	32%	49.09	7%
Monasterevin	13.94	3%	12.17	7%			26.11	4%
Naas	106.08 ²⁶	25%	12.27	7%	93.26	68%	211.61	29%
Newbridge	128.1 ²⁷	30%	–	0%			128.1	17%
Prosperous	0.56	0%	–	0%			0.56	0%
Rathangan	5.41	1%	–	0%			5.41	1%
Sallins	18.63	4%	–	0%			18.63	3%
Total:	421.1		178.38		137.94		737.42	
	57%		24%		19%			

²⁵ Includes lands zoned 'R: Commercial and Retail' suitable for employment generating purposes.

²⁶ Includes lands zoned 'T: Mixed Use' suitable for employment generating purposes.

²⁷ Includes lands zoned 'GU: General Use' suitable for employment generating purposes.

4.6 Strategic Land Banks

Based on the completed settlement analysis and exclusion of data centre specific lands (92.3 ha), it is notable that 41% (301.08 ha) of zoned and undeveloped land in Kildare relates to only five large employment locations (see Table 18 below). This is significant in the context of the current development plan period which would indicate the existing economic strategy is heavily contingent on their activation. These sites are considered to be significant in terms of scale and the opportunities they present, however, a reliance on just five locations for the county, assuming they are all feasible options in terms of activation, offers limited choice in terms of attracting major investment to other settlements in Kildare. Some of these locations are subject to the preparation of a masterplan and are in multiple ownership which may pose constraints; however, it is considered to be prudent to review these locations regularly in terms of their progression and overarching vision (as set out in Kildare County Council statutory plans) to support continued investment and employment opportunities of scale for the county.

Table 18: Current Strategic Employment Land Banks in County Kildare

Employment Area	Available Zoned Land (Ha)
Naas – Millennium Park	39.8
Leixlip – Collinstown	46.8
Kilcock – Boycetown	50.9
Maynooth – Laraghbyran West	44.68
Newbridge – Littleconnell	118.9
Total:	301.08 ha



5

Stakeholder Review

To understand the current economic position of Kildare and to help identify key trends relating to certain sectors, a range of stakeholders were engaged by the Planning Department during the preparation of the study. These consultations involved key stakeholders such as IDA Ireland, Kildare Local Enterprise Office (LEO), commercial property agents Lisney along with a mix of established and emerging industries representing a diverse range of sectors currently operating in County Kildare. The stakeholder engagements helped identify gaps and pinpoint opportunities that will inform future employment objectives.

The key discussion points raised, and conclusions drawn from this engagement exercise are summarised, as follows:



- There are clear regional and national policy ambitions to grow employment provision in County Kildare and the Dublin Metropolitan Area – however, an employment strategy at local level is required to ensure robust land use policies are in place to ensure sufficient site opportunities are available to create conditions to attract investment and supporting jobs growth.
- Quality of life, specifically access to housing and accommodation is one of the key location decision-making criteria for FDI companies when assessing and enquiring about opportunities in County Kildare.
- There is a notable shortage of high-quality office space to rent and purchase throughout the county. With changing work practices the norm in addition to an increasing demand for space outside prime city centre locations, towns such as Maynooth and Naas are of strong interest to fledgling enterprises due to their proximity to Dublin, track record of investment and university status (in the case of Maynooth).





- The rapid growth of the 3PL (Third Party Logistics) industry and the importance of Rosslare Europort since Brexit has brought a renewed focus and demand for space between Naas, Ladytown and Newbridge. These locations along the M7/N7 artery have experienced significant warehousing development recently due to its accessibility and level of infrastructure. This trend is expected to continue, however there is an opportunity to grow this employment sector in other locations in Kildare, requiring focused intervention and more robust land use policy.
- A review of stakeholder engagements and baseline information identified opportunities to grow specific employment sectors in the areas of deep tech, life sciences and professional services, including advanced engineering, specialist manufacturing and third party logistical (3PL) operations. These emerging sectors and associated industries are a priority in terms of attracting inward investment.
- Space requirements for warehousing development are now much higher with fledgling enterprises seeking larger sites with the ability to facilitate greater floor plates. It was noted there is regular demand for light industry units between 900 sq. m – 7,400 sq. m (10,000 sq. ft – 80,000 sq. ft and units greater than 84,000 sq. ft (7800 sq. m) to meet international requirements.
- The majority of sectors seeking to lease/acquire office or warehouse accommodation will only consider new high quality 'Grade A' space to meet sustainable commitments, reducing carbon footprints through energy efficiency and recycling principles.
- Kildare is well-positioned to attract and retain emerging sectors and future synergies relating to Deep Tech, Med-Tech and Bio-Tech industries, capitalising on the re-development of the Kildare Innovation Campus and its ability to facilitate larger space requirements and associated development.





- While the delivery of new homes is a necessity for employment growth and investment, the delivery of new 'Grade A' office space is also required to facilitate opportunities. It is widely accepted that office space, if speculatively developed, in North Kildare (Maynooth, Leixlip, Celbridge) and Naas would not only cater for demand but also stimulate further growth, in addition to attracting new sectors to match resident skill sets.
- There are regular enquiries for large greenfield sites in certain locations that are capable of facilitating FDI sectors, however a lack of feasible site options and certain unknowns relating to supporting infrastructure servicing provision is considered an ongoing major constraint for locating in the county.
- An emphasis should be placed on developing sectors and future partnerships relating to the knowledge economy, specifically Life Sciences, R&D and ICT adjacent to Maynooth University. It is considered that this has significant untapped potential in respect of health and technology industries where the establishment of clusters and future synergies will be crucial to its success.
- In keeping with quality-of-life considerations, more and more enterprises are prioritising access to on-site amenities such as food services, gyms and green open spaces when choosing property solutions within business/enterprise parks. These amenities are now seen as essential for both attracting workers and in creating a convenient and supportive work environment that enhances work-life balance.
- It was highlighted that delays with ESB grid connections are proving a major constraint to new development and expansion plans for some industries across the county. A consistent requirement for associated substation infrastructure for all future projects can prove costly which can impact overall viability.





- Poor placemaking, dereliction and vacancy is a major deterrent to economic development. A lack of investment particularly in the south of the county is a challenge when encouraging fledgling enterprises and future investment to the area.
- A significant quantum of land zoned for employment uses has not yet come forward and is deemed not available for development, including a number of longstanding zonings which are impacting economic activity in certain towns. The future role of existing lands needs to be reviewed, with landowner motivation and all development constraints identified at an early stage.
- A review of socio-economic indicators confirms variable levels of employment performance, however there is a clear correlation where existing job opportunities do not match resident skill sets which consequently contributes to high commuting outflows. This is particularly evident in the north of the county (Kilcock, Maynooth, Leixlip, Celbridge), Naas and Newbridge.
- With office development within the county generally unviable to build speculatively, Kildare County Council may wish to consider its options to encourage such development through a number of arrangements drawing on similar local authority success in delivery:
 - **Pre-Lease** – lease of all or part of a building from a private developer making the scheme viable to progress. This would then allow the local authority to sublet to other enterprises for a specific term.
 - **Rent Guarantee** – guarantee the rent on all or part of the building for a specified time period while the lease holder seeks a tenant.
 - **Service Sites** – local authority to work jointly with private developer to provide necessary servicing and infrastructure required to ensure viability.
 - **Development Contributions** – waiving of development levies for a time on any office development in the county or within targeted specific locations. This has been successful for residential schemes.



6

Employment Land Requirements

This section identifies the future employment land requirements for County Kildare, including a detailed insight into future space requirements to facilitate projected jobs growth at settlement level. Looking ahead to 2040, this section will establish a projection for future office and industrial/warehouse accommodation required to stimulate investment and jobs growth in certain sectors based on applied assumptions and review of key baseline information.

6.1. Methodology

To establish future employment space requirements in County Kildare, with particular regard to its higher order settlements, a range of quantitative and qualitative assessments presented in preceding chapters examined ongoing economic and market conditions along with a review of historical development trends, including insights obtained during a range of stakeholder consultations. This has led to the development and consideration of two specific employment scenarios both of which reflect current macroeconomic trends in addition to the economic aspirations and vision for the county going forward. The methodology outlined below includes many variables and informed assumptions which should be used as a guide and direction, rather than an absolute requirement.

6.2 Overall Approach



²⁸ Disaggregation – means of separating data or groups of data into individual, smaller or component parts for more detailed analysis or understanding.

6.2.1. Population and Jobs Growth Targets

The population targets for County Kildare are outlined in Table 19 below. Considering the robust rate of growth across the county since the last census period in (2022), an assessment was carried out by Kildare County Council's Planning Department to establish revised population estimate for the county and its largest settlements as of Quarter 4 2025. For the purposes of this study, population projections and structural housing demand analysis prepared by the Economic and Social Research Institute (ESRI) in July 2024 have been implemented to provide a population projection for County Kildare to 2040.²⁹ These targets set out additional growth for Kildare which identifies a projected population growth of 43,699 to 2040. This equates to an average growth of 2,913 persons per annum over a 15 year period to 2040.

Table 19: County Kildare Population Estimate and Growth Projection Q4 2025 – 2040

Year	Census 2022 Population	Estimated Q4 2025 Population	2040 Population Projection
County Kildare	247,774	271,401	315,100

To understand population targets at a settlement level, Table 20 below outlines the projections for each settlement and attributed growth based on the 2040 population target outlined. The level of growth and distribution to each settlement has been defined by available capacity and supporting physical and social infrastructure required to cater such growth and level of development. Outlined growth distribution per settlement has been derived from internal research and assessments carried out by the Kildare County Council's Planning Department.

Table 20: Indicative Population Growth Projections (Settlement Level) Q4 2025 – 2040

Settlement	Q4 2025	2040	Growth in persons	% Growth Distribution	% Growth Increase	Annual Growth
Naas	27,855	37,578	9,723	22.2%	35%	648
Maynooth	18,027	29,957	11,930	27.3%	66%	795
Newbridge	27,110	31,266	4,156	9.5%	15%	277
Leixlip	17,759	21,958	4,199	9.6%	24%	280
Kildare Town	11,831	14,099	2,268	5.2%	19%	151
Athy	11,911	13,707	1,796	4.1%	15%	120
Celbridge	21,484	26,444	4,960	11.3%	23%	331
Kilcock	9,692	10,750	1,058	2.4%	11%	71
Monasterevin	5,800	6,486	686	1.5%	12%	46
Clane	9,436	10,070	634	1.4%	7%	42
Sallins	6,371	6,874	503	1.1%	8%	34
Kilcullen	4,361	5,021	660	1.5%	15%	44
Kill	4,148	4,493	345	0.8%	8%	23
Prosperous	2,783	3,045	262	0.6%	9%	17
Rathangan	3,452	3,688	236	0.5%	7%	16
Castledermot	1,966	2,097	131	0.3%	7%	9
Derrinturn	1,723	1,880	157	0.3%	9%	10

²⁹ Kildare population target derived from ESRI Population Projections (Research Series No. 190, July 2024) available at: <https://www.esri.ie/system/files/publications/RSI190.pdf> (accessed: 05/05/2026)



In establishing employment projections, the Kildare County Development Plan 2023–2029 (as varied) suggests the jobs ratio for the county and each settlement should not fall below 0.70. This figure is used as an indicator to assess the existing level of employment opportunities and overall sustainability of the settlement. If this jobs ratio target is applied to the projected population growth for the county, an additional 17,729 jobs will be required up to 2040.³⁰ Although this jobs ratio (0.70) appears to be a relatively low figure, it is noted that Census 2022 recorded that there are currently only three settlements within the county which exceed this, with the remainder being significantly below. Most settlements and the majority of the resident workforce are commuter driven with a strong reliance on centres of employment outside the county. This land use strategy seeks to further stimulate employment creation and maximise the jobs potential in appropriate locations throughout the county. It is considered that the publication of the revised NPF (2025) and the additional housing growth requirements allocated to Kildare, represent an opportune time to achieve a greater alignment between population and employment opportunities. To align with the existing settlement hierarchy, a jobs ratio range has been applied to each settlement type rather than setting individual targets (see Table 21).

Table 21: *Proposed Jobs Ratio Targets*

Settlement Type	Proposed Job Ratio Range
Key Town	1.1 – 1.4
Self-Sustaining Growth Towns	0.8 – 1
Self-Sustaining Towns	0.75 – 0.9
Towns	0.5 – 0.75

Whilst it is acknowledged that the job ratio targets outlined for each settlement in Table 22 overleaf are ambitious, consideration has been given to key factors such as resident skill sets, existing job provision, including the necessary supporting infrastructure required to attract investment. The respective job ratio targets outlined will provide a strategic approach and vision for each settlement by identifying opportunities for sectoral growth, whilst ensuring employment development occurs in the most appropriate and feasible locations. To strike a balance and consistency across the county, the median jobs ratio target has been selected and integrated into further analysis and assessment throughout this study.

³⁰ Jobs growth figure derived using Enterprise and Employment Zoning methodology outlined in 'Development Plans: Guidelines for Planning Authorities (June 2022)'. All figures applied relate to County Kildare as per Census 2022. $17,729 = (43,699 \text{ (Population Growth)}) \times 0.92 \text{ ('At Work')} \times 0.63 \text{ (Labour Force Participation Rate)} = 25,328$. $25,328 \times 0.70 \text{ (Jobs Ratio Target)} = 17,729 \text{ jobs}$

In the formulation of the jobs growth projection targets, the methodology used follows the enterprise and employment zoning methodology (Section 1.4 – Appendix A) outlined in ‘Development Plans – Guidelines for Planning Authorities’ (2022). This approach considers the labour force ‘at work’³¹ population, including the labour force participation rate³² to distinguish the potential workforce for each settlement. In the absence of more up-to-date data, the figures applied to calculate the potential workforce follows local macro trends recorded in Census 2022.

Table 22: Projected Jobs Growth – Settlement Level

Settlement Type	Settlement	2026 – 2040 Projected Growth	Potential Workforce	Projected Jobs Ratio (Low)	Projected Jobs (Low)	Projected Jobs Ratio (High)	Projected Jobs (High)	Median Jobs Target	Annual Jobs Growth
Key Towns	Naas	9,723	6,056	1.1	6,661	1.4	8,478	7,570	505
	Maynooth	11,930	7,291	1.1	8,020	1.4	10,207	9,113	608
Self-Sustaining Growth Towns	Newbridge	4,156	2,393	0.8	1,915	1	2,393	2,154	144
	Leixlip	4,199	2,466	1.17*	2,885	1.4	3,206	3,045	203
	Kildare Town	2,268	1,329	0.8	1,063	1	1,329	1,196	80
	Athy	1,796	897	0.8	718	1	897	808	54
Self-Sustaining Towns	Celbridge	4,960	3,039	0.75	2,280	0.9	2,735	2,507	167
	Kilcock	1,058	724	0.75	543	0.9	651	597	40
	Monasterevin	686	413	0.75	310	0.9	372	341	23
	Clane	634	405	0.75	304	0.9	365	334	11
Towns	Sallins	503	331	0.5	166	0.7	232	199	13
	Kilcullen	660	414	0.65	269	0.7	290	280	19
	Kill	345	211	0.54	114	0.7	148	131	9
	Prosperous	262	148	0.5	74	0.7	104	89	6
	Rathangan	236	145	0.5	73	0.7	102	87	6
	Castledermot	131	74	0.5	37	0.7	51	44	3
	Derrinturn	157	89	0.5	44	0.7	62	53	4

*1.17 – Existing Jobs ratio for Leixlip as of Census 2022

31 ‘At Work’ population of working age (15 years of age +) who considers themselves employed or self-employed regardless of official status, working time or income.

32 Labour force participation rate is the percentage of the population aged over 15 years of age who are in the labour force (either employed or unemployed).

6.2.2 Jobs Ratio Target

Table 23 below outlines the number of jobs and shortfall required to meet the proposed jobs ratio targets in each settlement. Using the most recent employment data available (Census 2022), the proposed jobs ratio targets are applied to the resident workforce to understand the gaps in local jobs and what would be required to meet targets set out for each settlement. As previously noted, the median jobs ratio target has been applied throughout further analysis and assessment. Establishing the jobs balance and jobs growth targets together provides a more robust assessment of the level of employment required to build on the present situation, including the challenge in creating more sustainable settlements going forward.

Table 23: Jobs Ratio Target and Balance

Settlement Type	Settlement	Resident Workforce (2022)	Jobs Ratio (2022)	Local Jobs (2022)	Jobs Ratio Target (Median)	Jobs Target Balance Required (Median) ³³
Key Towns	Naas	12,726	0.92	11,690	15,908	4,218
	Maynooth	8,406	0.82	6,898	10,508	3,610
Self-Sustaining Growth Towns	Newbridge	11,099	0.66	7,337	9,989	2,652
	Leixlip	7,823	1.17	9,166	10,053	887
	Kildare Town	4,642	0.65	2,996	4,178	1,182
	Athy	4,256	0.58	2,474	3,830	1,356
Self-Sustaining Towns	Celbridge	9,925	0.33	3,297	8,188	4,891
	Kilcock	4,364	0.33	1,335	3,600	2,265
	Monasterevin	2,410	0.6	1,443	1,988	545
	Clane	4,028	0.52	2,094	3,323	1,229
Towns	Sallins	3,135	0.25	778	1,881	1,103
	Kilcullen	1,820	0.65	1,185	1,229	44
	Kill	1,800	0.54	978	1,116	138
	Prosperous	1,059	0.41	431	635	204
	Rathangan	1,485	0.4	588	891	303
	Castledermot	721	0.46	331	433	102
	Derrinturn	764	0.29	218	458	240

³³ Jobs Balance (Median) = Jobs ratio target (median) minus no. of local jobs (Census 2022)

6.2.3. Disaggregation of Jobs Growth by Sectors

The establishment of job growth targets by employment sector has been informed by a number of key considerations:



- Regional and local policy identifies Naas and Maynooth as key towns, which have a key economic function providing employment for surrounding areas with ambitious growth targets, these towns have the potential to be key drivers of new and emerging sectors including additional multinational investment.
- A review of stakeholder engagements and baseline information identified opportunities to grow specific employment sectors in the areas of deep tech, life sciences and professional services, including advanced engineering, specialist manufacturing and third party logistical (3PL) operations. These industries are a priority in terms of attracting inward investment.
- Kildare may be recognised as a key employment centre, however 47% of the resident workforce are employed outside the county which undoubtedly highlights the influence of the Dublin Region as the largest jobs market in the country. However, this also creates opportunities to attract new sectors and greater job prospects for existing residents in appropriate locations.
- More than half (57%) of jobs in FDI supported companies in the Mid East region are located in County Kildare. The targets and ambitions of key stakeholders should be supported using the county's attributes to promote future FDI.
- Trends in occupational type and employee skill sets are a useful gauge into assessing the type of workforce in County Kildare. Since 2016 the occupational group with the largest increases are 'Managers, Directors, and Senior Officials' (+19.7%), and 'Professional Occupations' (+35.7%). These two groups have clear spatial distributions with the highest rates in the Dublin Metropolitan Area which encompasses the north-east of the county. This highlights a strong level of skilled and educated residents with a gap in suitable job opportunities.
- A review of employment sectors and property type confirms that office-based jobs (ICT, Professional Services, Education, Public Administration and Social Work) comprise 46% of local employment. The ratio of resident workers to local jobs in these office-based roles is 0.59.³⁴
- Kildare continues to experience strong industrial and warehouse development covering manufacturing and wholesale/retail sectors with a 10% increase since 2016. While this employment type caters for 41% of local jobs, the growth and location of such uses should be concentrated along strategic corridors served by existing/planned transport and servicing infrastructure.
- Take-up of office space and prime rents are starting to return to a reasonable pre-COVID 19 level, including a demand for new 'Grade A' space in suburban locations such as Maynooth and Naas.

³⁴ For every one resident employed in this sector type, there is 0.59 jobs currently existing.



- Historical trends in employment change are a useful barometer. A review of employment trends between 2011 – 2022 confirmed the highest growth was in ICT and technology-based jobs with a sizeable gain of 81%. Alongside this, logistics and distribution experienced growth of 21.2% during the same period. It is envisaged these categories will continue to drive employment growth over the period to 2040.
- There has been a major increase in the numbers commuting to work since 2016 (19.9% or +18,949 persons). Targeting economic activity in suitable locations that has the potential to enable a greater modal shift away from commuting should be prioritised.
- The greatest increase in work classification has been the 'Working Mainly from Home' group which has grown +255% from 3,789 in 2016 to 13,439 in 2022. While it is acknowledged that this data was recorded during the latter part of the COVID-19 pandemic, this working model is considered to remain an important consideration in job choice, particularly for employees who can work from home two to three days a week. To provide a direction and strategy into future employment growth and sectoral targets for County Kildare over the period to 2040, two scenarios were developed and set out overleaf.





Scenario 1

Kildare Distribution of Jobs

A review of the CSO Census 2022 employment data for Kildare confirms that 36% of jobs relate to agricultural, construction, wholesale and retail, including other services sectors.

This scenario assumes that **64% of future jobs** in Kildare will be retained and remain consistent in office and warehouse/industrial type accommodation which includes manufacturing, ICT, Financial and Professional Services, Public Administration and Education and Social sectors. This scenario seeks to exclude jobs that are not normally associated with this accommodation type (e.g. Retail and hospitality) to provide a more focused target.



Scenario 2

Regional Distribution of Jobs (Minus Retail and Non-Office and Industrial Space Growth)

A review of the CSO Census 2022 employment data for the Mid-East and DMA region (excluding Dublin City and Wicklow)³⁵ indicates 75% of jobs in this region are in office, warehouse and industrial type categories covering a broad range of sectors and job types. Considering Kildare's proximity to Dublin and its economic influence on the wider region, it is assumed **75% of future jobs growth** and economic activity if not more will be in these sectors if not improved on this trend.

While this study focuses on a large study area, it is agreed that the disaggregation of jobs growth and chosen scenario should be established at an individual settlement level considering the contrast in locational attributes, demographics, employment industries and job types currently available. Sectoral targets at the settlement level is detailed in the future employment strategies (Appendix B) of this report. As part of stakeholder discussions, it was agreed that certain locations are either more suited to targeting emerging sectors and/or should be the centre of focus for the growing and clustering of existing industries. While the consideration of market activity and future trends is important, the capacity and ability to facilitate growth from a servicing infrastructure aspect is also a key consideration of the future growth strategy for each settlement.

Preferred Scenario (Scenario 2)

Based on a review of the above scenarios and considering the aspirations to grow jobs in targeted sectors that require office and industrial/warehouse property solutions, it is recommended that Scenario 2 be advanced as the preferred future forecast option. County Kildare exerts significant influence in the Greater Dublin Area due to its strategic location, proximity and high-quality transport connections to Dublin City Centre, Ireland's ports and airports. This high level of strategic accessibility alongside the presence of a young, growing and highly educated workforce has resulted in the county becoming a hub for FDI in the technology, financial services and pharmaceuticals sectors. Over the short to medium term, it is anticipated that the current level of employment and sector breakdown will not only be maintained but has the potential for further growth. Accordingly, it is prudent to develop an overarching vision for the county where it can maintain its position at the forefront of FDI investment within the GDA, enhancing its appeal and ability to attract investment of scale.

³⁵ The Mid-East and DMA employment dataset from the CSO includes Kildare, Meath, Louth, South Dublin, Dun Laoghaire-Rathdown and Fingal local authorities, recognising the comparisons of each area in terms of existing employment provision and job types, track record of economic investment, including locational attributes and overall market appeal.

6.2.4. Employment Densities

The proposed employment density figures have been derived from review of the UK's Homes and Communities Agency's Employment Density Guide 3rd Ed (2015), as outlined in the OPR Practice Note 'Planning for Employment Growth'.³⁶ These figures can assist in understanding how many jobs can be created from accommodation built. In order to ground them within a local context, these figures have been cross-referenced with a sample of recent development in Kildare, including a peer review and market perspective from Lisney. According to Lisney, there are no specific trends in terms of the amount of space taken by various sectors due to the smaller nature of the Irish market in comparison to the UK. In terms of office space, prior to COVID-19 most occupiers sought between 10 and 17 sq. m per employee. With the evolution of work from home and hybrid models, it could be suggested that space requirement per employee will move closer to the lower end of the range. It is expected many occupiers will continue to focus on the amount of common space within an office scheme and how such spaces can be used for wellbeing and developing an improved workplace culture in a bid to attract employees to work in an office environment. Accordingly for the purposes of this assessment and further analysis, a figure of 12 sq. m has been applied from the various office occupancy types.

In industrial and warehousing development, space per employee is not a critical consideration as requirements are based on the overall use of the building. From a review of some recent development across the county and the GDA, it is seen that the figures set out in the 2015 UK Density Guide is relatively in line with the prevailing trend. An employee density figure of 77 sq. m is assumed for logistics, and 36 sq. m for industrial and manufacturing space. Regarding R&D space, a density range of 40-60 sq. m is generally recommended. With a number of key locations primed to facilitate this type of sector and associated development, a figure of 60 sq. m per employee has been assumed.

Table 24: Employment Densities

Category	Sample Sectors	Employment Density (Sq. m)
Office	ICT, Professional services, finance and public sector	12 sq. m
R&D	Laboratories, clean rooms, specialist engineering	60 sq. m
Light Industry and Manufacturing		
Industrial	Factories, production and manufacturing	36 sq. m
Logistics	Warehousing, storage and distribution centres	77 sq. m
Data Centre	Data storage and processing	740 sq. m

³⁶ <https://publications.opr.ie/view-planning-practice-file/OTA/> (accessed: 05/05/2026)

6.2.5 Plot Ratios

A plot ratio is a measure that represents the density of a building or buildings within a site area. It is calculated by dividing the total floor area of the building(s) by the area of the site on which it is located. The plot ratio figures used for the purposes of this study are derived from a review of practical examples of recent development across the county, including a peer review from Lisney in terms of a commercial market perspective.

With regard to office space, there are many variances due to nature and intensity of development across the county. In recent years, smaller more traditional business parks had a low plot ratio providing 0.25 – 0.40. A recent example in suburban Dublin (Citywest) shows the development of a 3-storey office building of approximately 4,500 sq. m including car parking, provides a plot ratio of 0.8 on a 0.45 hectare site. It is felt this is representative of prospective office development in key urban settlements such as Naas and Maynooth.

A recent example of industrial/warehousing development in the southwest (Greenogue Business Park) and northwest (North City Business Park) of Dublin provides a plot ratio between 0.4 – 0.5. Regarding logistics a recent development in the Espirit Business Park in Celbridge has a plot ratio of 0.35. Accordingly, for the purpose of this study, a plot ratio of 0.35 is applied for warehousing and logistics, and a midpoint is applied of 0.45 for industrial development. When it comes to R&D space, this is generally associated with or in line with warehousing typology requirements. While recent metrics for this typology are not available, a similar plot ratio to industrial development is assumed. While data centre development has not yet commenced in Kildare, it does contain lands zoned specifically for this purpose. The site coverage of these facilities is generally low, as such a plot ratio of 0.44 can be assumed which is in line with recent development proposals in the region.

Table 25: *Applied Plot Ratio Figures*

Category	Plot Ratio (sq. m per hectare)
Office	0.8 (8,000 sq. m)
Warehousing/Logistics	0.35 (3,500 sq. m)
Industrial	0.45 (4,500 sq. m)
R&D	0.45 (4,500 sq. m)
Data Centre	0.44 (4,400 sq. m)

6.2.6 Land and Floorspace Requirements

Table 26 overleaf presents a high-level summary of the outputs and forecast using the preferred scenario across each of Kildare's higher order urban settlements. This forecast includes the disaggregation of job types and sectoral targets, including the associated land requirements to facilitate such growth over the period to 2040 (see Appendix B for settlement level analysis). It is important to note, that the scenario and final outputs identified are based on a combination of evidence-based analysis and future assumptions informed by prevailing economic trends. The resulting outputs are intended as guidance to support future land-use planning decision making.

When we assess the jobs growth targets and associated land requirements to 2040, it is evident that the majority of towns currently have a sufficient quantum of land available to meet projected sectoral growth. However, the towns of Maynooth and Celbridge are currently showing a deficit and in the case of Celbridge, it shows that there is no available undeveloped land which is major constraint to the towns economic development in the short-medium term. Other towns such as Clane is also highlighted as requiring additional zoned land to facilitate projected growth targets (see Table 26 overleaf).

Table 26: Land and Floorspace Requirements – Settlement Level Summary

Settlement	Jobs Growth Target ³⁷	Proposed Sector Split %	Land Requirement to 2040 (ha)	Available / Undeveloped (ha)	+ Surplus (Deficit) (ha)
Naas	8,840	55% – Office 30% – Logistics 15% – Industrial	76.24	211.61	+135.37
Maynooth	9,542	40% – R&D 40% – Office 20% Industrial	71.88	49.09	(22.79)
Newbridge	3,605	50% – Industrial 50% – Logistics	54.06	128.1	+74.04
Leixlip	2,949	45% – Office 40% – R&D 15% – Logistics	27.43	46.8	+19.37
Kildare Town	1,784	55% – Industrial 40% – Logistics 5% – Office	23.69	73.26	+49.57
Athy	1,623	75% – Industrial 25% – Logistics	18.67	35.21	+16.54
Celbridge	5,549	65% – Office 20% – Industrial 15% – R&D	25.38	0	(25.38)
Kilcock	2,147	50% – Industrial 50% – Logistics	32.2	87.49	+55.29
Monasterevin	665	70% – Industrial 30% – Logistics	8.11	26.11	+18.0
Clane	1,172	60% – Industrial 30% – Logistics 10% – Office	13.54	7.03	(6.51)
Sallins	977	40% – Industrial 40% – Logistics 20% – Office	12.02	18.63	+6.61

While some settlements may have sufficient land currently zoned to meet the projected jobs growth, it is important to consider a range of external factors which may impact the amount or lack of available land. The availability of sites in terms of capacity, feasibility and landownership status/motivation should be considered at the plan making stage (i.e. through the preparation of settlement plans or in the review of the County Development Plan). The take up and activation of employment land in Kildare is strong, however it was noted during stakeholder engagements that some settlements in both the north and south do not provide tangible solutions to facilitate prospective investment and market enquiries from a regional and international scale.

³⁷ Jobs Growth Target – This figure is calculated by adding the median jobs growth target (Table 22) and median jobs balance (Table 23), then applying the preferred scenario growth target for each settlement. See Appendix B (Employment Strategy) for detailed analysis.

The following key considerations will be important to ascertain when reviewing existing site options, and the identification of future lands going forward:



Land Ownership

Are there multiple landowners or is there one landowner with a large proportion of land zoned, is the available land owned by an existing employer/enterprise?



Land Use Zoning

Do the existing zoning objectives reflect current market conditions, is a certain property type and sector target appropriate to the settlement and location?



Market Requirements

Does the size and scale of the site reflect changing sectoral requirements and recent development trends?



Planning Activity

How long has the site been identified for employment, has there been any planning activity on the site, should the site be identified for an alternative use?



Feasibility

Does the site have sufficient capacity from a servicing and infrastructure perspective, are there any site constraints to be aware of which may impact development?



Location

Are available sites in the right location to meet market requirements?

7

Future Supply and Strategic Employment Locations

The following section sets out various site requirements for potential new investment in key and emerging sectors, including the identification of future strategic employment locations and the economic role these locations will have in Kildare.

7.1 Future Growth – Sector Requirements

One of the aims of this study is to ensure the right type of sites are available in the right locations to suit the appropriate sectors and market demands. To ensure this occurs, it is critical to identify what types of employment sites are needed and secondly, it is vital to determine what attributes these sites require to be attractive and appealing to investors. A clear understanding of evolving sector requirements has been an important aspect of this study in the identification of future growth locations. To appropriately inform future employment zoning recommendations, this study has developed a defined list of specifications and criteria to assist in determining the optimal locations for key employment sectors. Stakeholder engagement and commercial market advice have been key inputs to determining future growth attributes. This section also outlines a specification of employment uses if such were to be relocated (i.e. decanted) from areas identified in local area plans / settlement plans for regeneration.



Table 27: Specifications/Criteria for Key Employment Growth Sectors

Growth Sector	Sector Requirements	Indicative Space Requirements	Site Typology	Key Locations
Logistics and Distribution (3PL)	Strong Connectivity and proximity to primary roads and key urban centres of population. Ease of access to Dublin and Rosslare ports EPC 'Grade A' requirements³⁸ Greenfield/Brownfield opportunities Access to on-site amenities/services	Medium – Large Warehouse units to include small ancillary office space (900 – 7,500 sq. m) in the Greater Dublin Area) Flexibility to meet larger space demands to suit industry requirements. Min. eaves height 14m +	Industrial / enterprise park Exclusive / standalone site	Newbridge / Ladytown Naas Kilcock Athy Kildare Town Sallins
Digital, ICT and Professional Services	Skilled workers Fast links to Dublin or larger urban centres Quality of life – Profile of location key to attractiveness Access to clients and markets High Quality public transport and key infrastructure (broadband)	High quality, energy efficient 'Grade A' office space to small scale studios Flexible space to allow expansion	Office/business park Central mixed use employment areas surrounded by good services / amenities Transport Orientated Development (TOD) sites	Naas Maynooth Celbridge Leixlip Newbridge Kilcock
BioPharma and MedTech	Access to highly skilled labour Collaboration with R&D Centres and Third Level Institutions Cost effective locations close to urban populations Proximity to suppliers and transport links Strong infrastructure provision (including energy, broadband and access)	Range of premises – from large high specification laboratories, office space to light industry units Flexible to suit and change with business needs	Science, R&D park, office / enterprise Park Mixed use employment area Industrial / advanced manufacturing park Exclusive / standalone Site	Maynooth Celbridge Leixlip Newbridge Kilcock Naas

³⁸ EPC – Energy Performance Certificate

Growth Sector	Sector Requirements	Indicative Space Requirements	Site Typology	Key Locations
Specialist Engineering and Advanced Manufacturing	Access to skilled labour Facilities for workshops and design. Testing, measuring and production facilities	Range of premises –small to medium sized light industrial units. Flexible spaces with high-spec laboratory and office units.	Science, R&D park Industrial / enterprise park Mixed use employment area	Leixlip Celbridge Maynooth Kilcock Newbridge Naas
Life Sciences (R&D Innovation)	Availability of highly skilled labour Links to R&D centres and third level institutions Co-location and clustering of sectors to avail of skills / partnerships / synergies	Range of premises – large laboratories and workshops to small incubator units for startups Larger high spec units (deep-tech facilities) to provide move on – flexible space.	Science Technology and Innovation Campus Science – R&D park Office / business park	Leixlip Celbridge Maynooth
Light Industry/ Manufacturing	Access to labour Cost effective locations, proximity to local services/amenities Connectivity to national road network and large population centres. Proximity to suppliers	Medium – large flexible industrial units with ancillary office. Flexible to change internally to suit industry requirements	Industrial / enterprise park	Newbridge Athy Kilcock Kildare Town Clane Monasterevin

As outlined in the Table 27 above, the types of premises required for potential growth sectors can vary in terms of business nature and the types of activities undertaken. For example, many advanced manufacturing, engineering and life science sectors require flexible space that can be altered internally to suit production lifecycles on a regular basis. There are certain types of sites with a specific scale, form and environment which can accommodate many of the identified needs of most sectors from office and business parks, manufacturing and R&D sites to logistical hubs once appropriately located and of a scale to meet changing demands. The key settlement locations outlined in Table 27 are indicative but are considered to reflect the best possible locations which are in a position to meet sector requirements and attract such investment.

The regeneration and relocation (decanting) of certain employment sectors (Table 28) from mixed use/ urban centres have significant benefits for urban economies, supporting vibrant, liveable towns with more appropriate mixed uses. Whilst the benefits are manifold, it does have potential negative impacts that are associated with the displacement of local established businesses who will be reluctant to relocate to a new site. The study recognises the importance of retaining these jobs in the locality as part of the regeneration process and that future policy and land use objectives support the decanting of such uses to alternative cost-effective locations nearby. For this to be delivered successfully, robust leadership is required to implement effective policy change along with supporting incentives to encourage the re-location process.

Table 28: Specifications/Criteria for Potential Relocation Sectors

Potential Relocation Sector	Sector Requirements	Indicative Space Requirements	Site Typology	Key Locations
Trade Suppliers (Builder Suppliers, Agri Products and Fuel Stockists) Auto Services	Access to appropriate labour Cost effective space and locations Accessibility for commercial and HGV traffic Clustering of similar industry Adequate buffering from sensitive receptors (noise, dust or other impacts (e.g. Residential, school, playgrounds))	Small – medium scale light industry and warehousing units Large semi covered, including sufficient outdoor space requirements Potential for expansion	Industrial / enterprise park	Newbridge Kilcock Athy
Light Industry and Manufacturing Wholesale/Retail Uses	Access to suitable labour Cost effective/competitive locations Connectivity to national road network and proximity to urban population	Medium – large flexible light industry units with possibility of ancillary office	Office / industrial park	Newbridge Kilcock Athy



7.2 Employment Locations – Guiding Principles and Parameters

The identification of future strategic employment locations has been developed based on a review of national and regional policies. National Policy Objective (NPO19) of the National Planning Framework (2025) sets out provisions for local authorities to identify and quantify locations for strategic employment development in suitable locations that can facilitate competitively priced land options to suit prospective enterprises. The Regional Spatial and Economic Strategy (RSES) for the Eastern and Midland Regional Assembly 2019 – 2031 also outlines guiding principles to consider when planning for strategic employment growth, as follows:



- Location of Technology and Innovation Poles – Institutes of Technologies and Universities as key strategic sites for high potential growth of economic activity (Technology and Innovation Poles).
- Existing employment locations, density of workers, land take and resource/infrastructure dependency including town centres, business parks/industrial estates and single enterprise sites.
- Locations for expansion of existing enterprises.
- Locations based on extent of space requirements, tied to resources and dependency of different types of infrastructure (roads, water, energy, telecoms) and availability of appropriate skills.
- Locations for relocation of enterprises to alternative locations in order to release urban land for regeneration purposes.
- Where significant job location can be catered for through infrastructure servicing and proximity to public transport corridors.



Furthermore, as outlined in the study, the identification of strategic employment locations was advanced based on a review of available employment land, an analysis of the baseline findings and resident skill sets, including extensive engagement with key stakeholders throughout the assessment stage. This robust evidence base informed the development of the following key guiding principles, which in turn supported the identification of future strategic employment locations in County Kildare:



- Consideration of settlements which have the potential to address employment gaps/blackspots through the matching of resident skill sets and key socio-economic indicators.
- Ability to encourage expansion and retention of existing industries including the co-location of similar enterprises.
- Potential to take advantage of new emerging sectors with sites that meet space characteristics, including locations that can promote future clusters.
- Employment areas which can support existing sectoral and location-based strengths, encouraging synergies with existing industries.
- Areas which can facilitate the relocation (decanting) of older uses to facilitate the regeneration of urban sites for more efficient town centre uses.
- Contribution towards the achievement of sustainable transport objectives ensuring accessibility by non-car modes of transport (Transport Orientated Development).
- Targeting economic activity that can reduce commuting flows outside the county, whilst encouraging a modal shift.
- Feasible site options with potential to be activated in the lifetime of the strategy period based on servicing requirements.
- Ability to provide an alternative, more viable option for economic investment in response to any constraints or legacy issues that may exist in an area.
- Marketability and desirability of an area to cater for consistent market demand with a track record and commitment of investment.
- Opportunity for jobs growth near future centres of planned population growth.
- Opportunity to facilitate specialist sectors and the specific development type required to attract and allow such industries to flourish.
- Ability to achieve local objectives and capitalise on the delivery of wider cross border and regional economic development targets.

7.3 Defining a Strategic Employment Location

It is important to understand and define what a strategic employment location will be and what it hopes to deliver in the context of economic development for County Kildare. An employment site of strategic significance will be defined and characterised as follows:



- **Employment Scale:** Capable of accommodating employment growth of greater than 1,000 employees.
- **Site Size:** Is at least 20 ha or is likely to be larger to facilitate specific industry requirements. Sites greater than 5 ha such as office locations will also be considered as appropriate scale for strategic investment. In some cases, sites less than 20 ha will be considered in the context of the specific location and its strategic significance and track record.
- **Marketability:** Site and location to have premier appeal to national and potential FDI investors.
- **Viability:** Feasible and deliverable financially and able to overcome any significant infrastructure, physical and environmental constraints.
- **Transport Orientated Development (TOD):** Employment locations that can utilise land use strategies for significant growth should be adapted to reflect TOD opportunity (i.e. located adjacent or proximate to an existing/planned high-capacity public transport corridor).



7.4 Future Strategic Employment Locations

Having regard to the defining characteristics of a strategic employment location outlined in Section 7.3, a total of seven strategic employment locations have been identified as having the potential to facilitate significant employment growth for a specific settlement and its surrounding hinterland. Three of the locations are currently developed or partially developed and have been identified as strategic locations due to their employment provision to date and their potential for continued growth and clustering of international and FDI investment in a range of sectors. The remaining four locations have been identified under Regional Policy Objectives of the Regional Spatial and Economic Strategy (2019-2031) or recently identified through local area plans and variations to the Kildare County Development Plan. Some of the locations identified are subject to the preparation of a masterplan due to their scale, ensure their overarching development potential is maximised. New strategic locations identified will require the application of new zoning objectives during the relevant statutory plan review. In some cases, new locations may require a framework or masterplan to achieve specific economic objectives, ensuring development occurs in a sequential, phased and integrated manner, incorporating a high quality of design. The strategic employment locations identified below, demonstrate key attributes to meet sector specific investment, whilst capitalising on their own locational strengths, economic influence and infrastructure provision.

1

Parsonstown / Leixlip Demesne – Leixlip


2

Littleconnell – Newbridge


3

Ladytown


4

Collinstown – Leixlip


5

Loughlinstown/Hazelhatch – Celbridge


6

Laraghbyran West – Maynooth


7

Northwest Quadrant – Naas


1

Parsonstown / Leixlip Demesne – Leixlip



Context

The lands comprise the Kildare Innovation Campus (formerly Hewlett Packard) site and lands adjacent which are currently zoned I: Agricultural at Leixlip Demesne. The combined area of both sites comprises circa 118 hectares and are positioned between Leixlip and Celbridge, bounded by the M4 Motorway, and adjacent to Weston Airport and the recently developed DB Schenker logistics facility.



Sector Target

- Deep Tech and RD&I
- Life Sciences
- ICT and Professional Services

Proposed Land Use: Q – Enterprise and Employment

Economic Opportunity

The redevelopment of the Kildare Innovation Campus (KIC) seeks to maximise its former economic potential in developing a business campus best in class for sustainability and social integration. The campus proposes to develop a mix of science, innovation and ICT related uses which will co-locate with existing innovative technologies on site, including the delivery of new data management and storage infrastructure. It is envisaged the KIC will become one of the most attractive locations in Europe for future Deep Tech innovators providing best in class space to host the future of Artificial Intelligence and Quantum Computing advancements. Conveniently located, the Leixlip Demesne lands to the east will have strong economic appeal with the potential for supporting high end employment opportunities and associated office typologies. With the KIC site expecting to deliver a further 3,000 jobs, the adjacent lands have the potential to facilitate direct clusters and synergies from new and emerging sectors. These lands could also accommodate an element of social and community infrastructure that could support some of the recreational requirements of neighbouring settlements.

2

Littleconnell – Newbridge



Context

The Littleconnell Strategic Employment area is located to the northwest of the town spanning an extensive area (circa 248 hectares) that comprises existing industry and available greenfield lands. The area is bounded by the R445 Regional Road linking Newbridge to Naas offering direct connection to the M7 Motorway via Junction 10. Currently home to a number of major FDI operations and large-scale development making it a location of international appeal.



Sector Target

- Light Industry and Logistics
- Advanced Manufacturing and Production
- Specialist Engineering
- Biopharma

Current Land Use Zoning: H – Industry and Warehousing

Economic Opportunity

Forming a key part of the Naas to Newbridge Strategic Economic and Employment Corridor, the Littleconnell Strategic Employment Area has the opportunity to continue to develop into a world class location for high technology manufacturing, specialist engineering and logistics sectors, harnessing its track record and ability to attract large scale FDI. Home to global companies such as Pfizer, LIDL, Penneys and Diageo, the consolidation of the area will allow for the creation of a highly accessible employment zone with the necessary infrastructure in place. The quantum of available zoned land at this location presents a range of greenfield solutions suitable for international scale investment that can support a mix of standalone facilities or campus style development in a range of low-density typologies. The location also presents longer term expansion opportunities which have the potential to support anticipated demand and greater space requirements that now exist in today's market. In close proximity to Ladytown / Momentum Logistics Park, the Littleconnell area has the opportunity in the future to interconnect and form a cluster with both locations creating an employment district capitalising on recent investment and available infrastructure.

3

Ladytown



Context

Located within the Naas to Newbridge Strategic Economic and Employment Corridor, Ladytown comprises two enterprise parks which contain a range of small-large scale warehousing/industrial units in an expansive area extending circa 93 hectares.



Sector Target

- Light Industry and Logistics
- Advanced Manufacturing and Production
- Specialist Engineering

Current Land Use Zoning: H – Industry and Warehousing

Economic Opportunity

As one of the largest employment sites in Kildare, Ladytown has continued to attract significant economic investment from regional and international scale enterprises with larger space requirements. Recognised as a premier location for logistics and distribution sectors due to its strategic position proximate to the M7/M9 Motorways, including its access to a range of consumer markets and key ports such as Dublin and Rosslare Europort. The area is experiencing ongoing development with a number of large-scale 'Grade A' warehousing developments, including a pipeline of future schemes in progress which highlights the location's competitive appeal within the GDA. Currently employing circa 4,300 jobs, the continued future success of the area will require sustained investment in public transport infrastructure considering the scale of the lands and its satellite location. In close proximity to the Littleconnell Strategic Employment Area, a policy objective and economic vision for both areas seeks to consolidate each respective location, realising critical mass along a suitable corridor.

4

Collinstown – Leixlip



Context

The Collinstown lands comprise approximately 57 hectares and are located directly south of the Intel Ireland manufacturing facility. Currently in agricultural use and generally flat in topography, the lands are transacted by the Royal Canal and the Dublin–Sligo rail line. The lands are bound by the R449 Regional Road which provides direct access to the M4 Motorway and short walking distance to Louisa Bridge Train Station (a future DART station) and BusConnects routes.



Sector Target

- ICT and Professional Services
- Life Sciences and Medtech
- Deep Tech and RD&I
- Specialist Engineering/Manufacturing
- Biopharma

Current Land Use Zoning: Q – Enterprise and Employment
H – Industry and Warehousing

Economic Opportunity

The overarching vision is to provide a high quality, attractive and sustainable business campus serviced by comprehensive public transport infrastructure which can secure the economic viability and vibrancy of the area over the longer term. The lands have the potential to facilitate a range of office typologies to reflect key growth sectors, including the provision of light industry sectors and associated typologies adjacent established uses to the north of the site. Considering the sites locational attributes, planned new DART station (west of Louisa Bridge) and track record of investment in the surrounding area, the lands will be of international appeal to a diverse mix of sectors seeking a highly accessible location within the Dublin Metropolitan Area.

5

Loughlinstown / Hazelhatch – Celbridge



Context

Located directly adjacent to the Hazelhatch and Celbridge Train Station (a future DART Station), the lands are bounded by the R405 Regional Road (Hazelhatch Road) to the west and the (Loughlinstown Road) to the east. Comprising circa 41 hectares and currently in agricultural use, the lands are approximately 2 km from the town centre and 6 km from the M4 Motorway.



Sector Target

- ICT and Professional Services
- Life Sciences
- RD&I
- Specialist Engineering
- Biopharma

Proposed Land Use Zoning: Q – Enterprise and Employment

Economic Opportunity

Currently outside the settlement boundary, the subject lands is the first location identified for employment purposes to the south of the town which seeks to take advantage of existing rail links and planned road infrastructure (the Celbridge Hazelhatch Mobility Corridor) servicing the area. Considering the site's locational attributes and the proposed infrastructural investment in the area, the lands have the potential to support and deliver a mix of high-end job opportunities through a campus style setting, capitalising on the DART+ South West expansion which will provide significant frequency and capacity improvements to train services to and from the city centre. The lands can be the catalyst and influence for significant employment growth as part of a Transport Orientated Development (TOD) that can support opportunities for a highly skilled resident workforce. Straddling the South Dublin County boundary, the lands are in close proximity to the Grange Castle Business Park presenting opportunities to support future synergies and links with existing multinationals and emerging sectors.

6

Laraghbyran West – Maynooth



Context

The lands are located west of Maynooth University, adjacent the R148 Regional Road and north of the Royal Canal and existing rail line. Currently in agricultural use, the lands extend circa 44 hectares and are approximately 2.6 km from Maynooth Train Station and 4.4 km from the M4 Motorway. The lands are also in close proximity to the proposed Maynooth West DART Station.



Sector Target

- Life Sciences
- Research Development and Innovation
- ICT and Professional Services
- Specialist Engineering
- Biopharma

Current Land Use Zoning: P- Research and Technology

Economic Opportunity

Currently zoned P: Research and Technology, the lands have been identified for the purposes of developing a high-quality employment-based campus, where the focus of research and technology activities seek to maximise synergies with Maynooth University and other high-tech employers to develop the knowledge economy in the region. Subject to preparation of a masterplan for the wider Maynooth West Masterplan Area, the vision seeks to provide a fully legible and connected campus facility, supported by efficient public transport infrastructure which can assist in the long-term economic viability and vibrancy of the area. The presence of Maynooth University is a unique asset for the town, county and region with direct economic benefits, whilst also fostering and developing the wider knowledge economy. The delivery of high-quality jobs within this future campus will enable a greater proportion of the well-educated resident population in the town to work near where they live, while successfully fulfilling its role as an economic driver within the Dublin Metropolitan Area.

7

Northwest Quadrant – Naas



Context

A unique area of land extending to circa 209 hectares which is bound by the M7 Motorway between Junctions 9a and 10. Spanning a large area and approximately 2 km from the town centre, the lands are partly developed containing a mix of enterprise and warehousing uses forming part of the Millennium Park enterprise district.



Sector Target

- Professional Services
- ICT and High Tech
- Research Development and Innovation
- Specialist Engineering
- Biopharma
- Light Industry and Logistics

Proposed Land Use Zonings: Q – Enterprise and Employment
H – Industry and Warehousing

Economic Opportunity

The Northwest Quadrant (subject to the preparation of a masterplan) has the potential to become an internationally recognised location for people to live, work and invest, providing a low carbon and sustainable urban district. The masterplan area seeks to provide a high quality and dedicated innovation district with high-end employment opportunities capitalising on its strategic location and existing enterprise clusters within Millennium Park. With a number of key sites available, these lands have the potential to facilitate significant economic investment that can further enhance the location's premier appeal. While the primary focus is to provide high end employment opportunities and associated office typologies, the location will be of strong appeal to logistical and warehousing industries seeking large greenfield solutions in a highly accessible location along a strategic corridor.

8

Implementation

The outputs of this study comprises two main components which sets out a strategic vision for supporting the future economic development of the county through the identification of strategic employment locations, including an employment strategy for each major settlement that can enhance economic investment and facilitate future jobs growth over the period to 2040. In order for the targets and recommendations of this study to be realised, the application of a land use zoning objectives implemented through a specific plan making process will be required to provide a statutory footing.



Component 1:
Strategic Employment
Locations



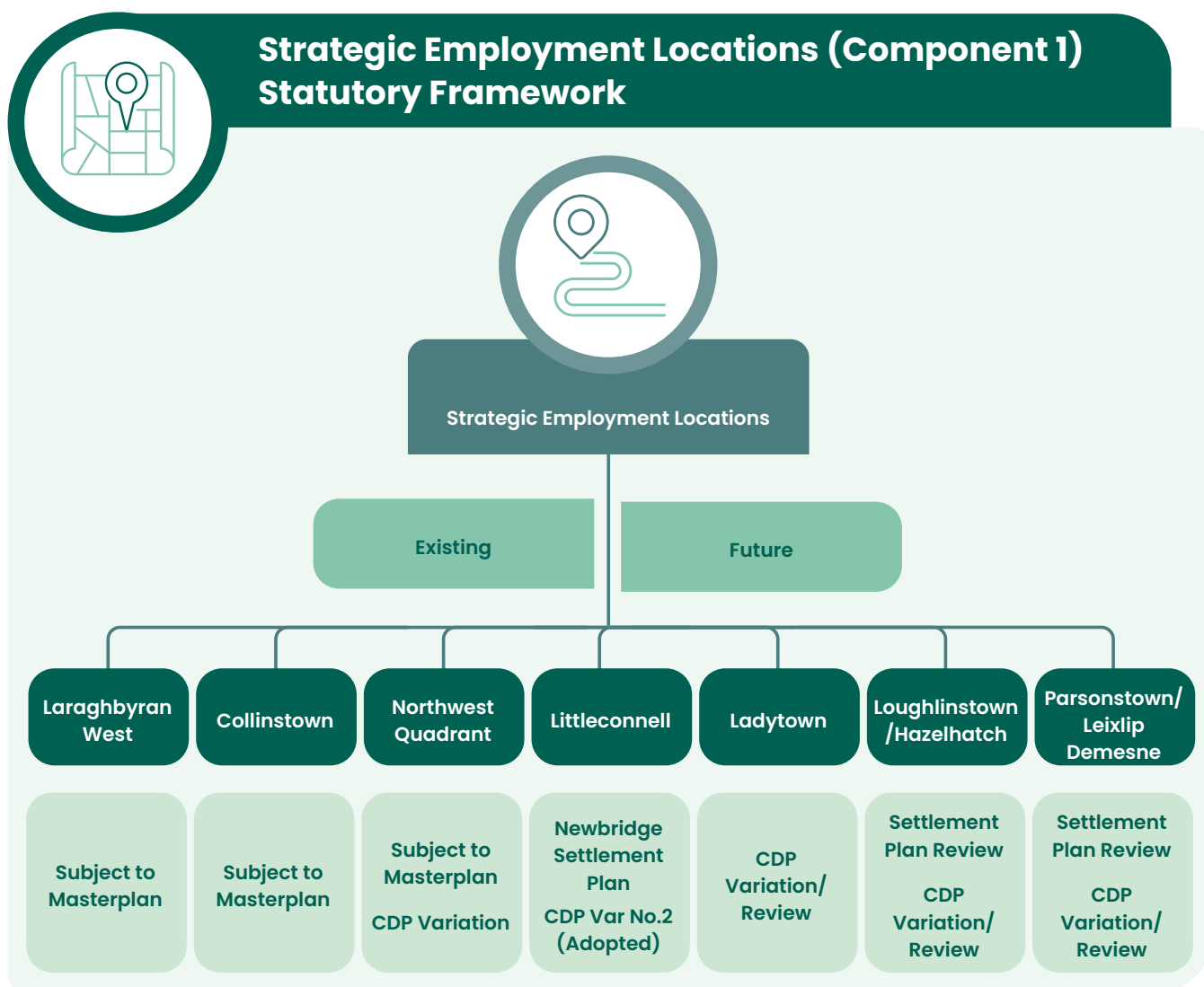
Component 2:
Future Employment Strategy
(Settlement Level)



The study recognises that a number of Strategic Employment Locations are currently identified through existing policy objectives at both regional and county levels, however certain new locations will require new or additional zoning objectives and incorporation as part of the preparation of the next county development plan, or by way of statutory variation to the current county development plan, if required. While a number of employment locations have been identified through existing policy objectives, some of these sites are currently subject to the preparation of a masterplan and adoption of same.³⁹

Appendix B outlines the future 'Employment Strategy' for each settlement in terms of jobs growth targets, including sectoral targets that have the potential to attract future investment and deliver employment opportunities to match resident skill sets. The economic vision and future direction for each settlement including land requirements to facilitate such growth will be implemented through upcoming settlement plan reviews (to be incorporated into the development plan by way of variation), or the next county development plan review stage depending on the settlement type and classification.

Figure 7: Strategic Employment Locations (Component 1) – Statutory Framework

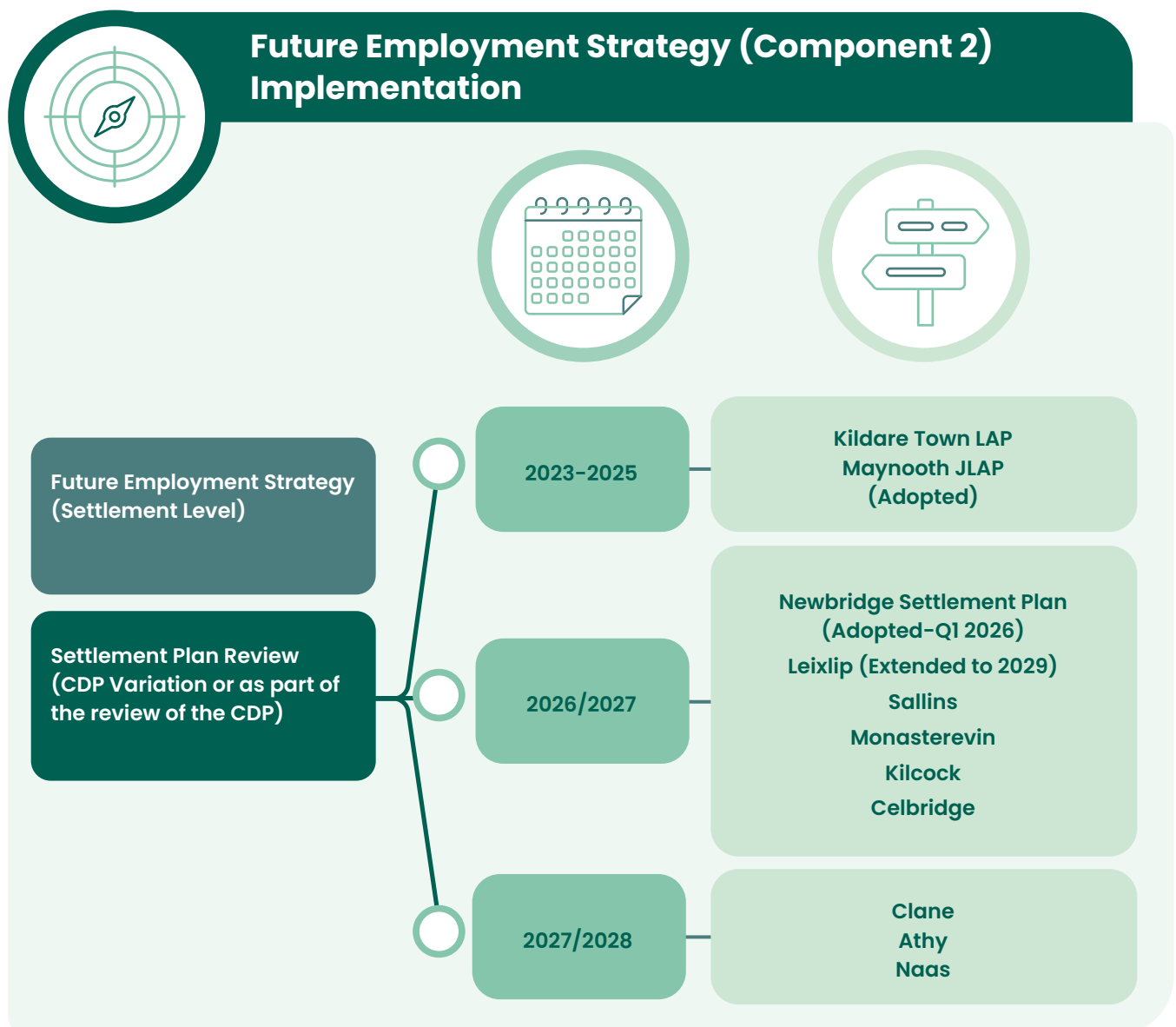


³⁹ Strategic Employment Locations subject to the preparation of a masterplan include – Collinstown, Leixlip; Northwest Quadrant, Naas; Laraghbyran West, Maynooth.

With the implementation of the new Planning and Development Act 2024 (as amended) being rolled out, the statutory mechanism utilised may be subject to change having regard to plan periods and subsequent legislative change that may impact the plan making process. Figure 7 (see previous page) outlines the statutory framework currently in place for existing Strategic Employment Locations identified. It also outlines the statutory process and policy framework required for the identification and subsequent zoning of new employment locations.

Figure 8 below provides an outline of the statutory process and planning framework required for the implementation of the 'Future Employment Strategy' outlined for each settlement, including an indicative timeline for the relevant plan review and implementation of respective strategies.

Figure 8: Future Employment Strategy (Component 2) – Implementation



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Comhairle Contae Chill Dara
Kildare County Council