

## Workspace Audit July 2022





Revisions tracker

Revision	Date	Description
A	01-06-2022	Issue for client review
B	06-07-2022	Second issue
C	27-07-2022	Final issue

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We Made That (unless otherwise stated)

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00.

# Introduction

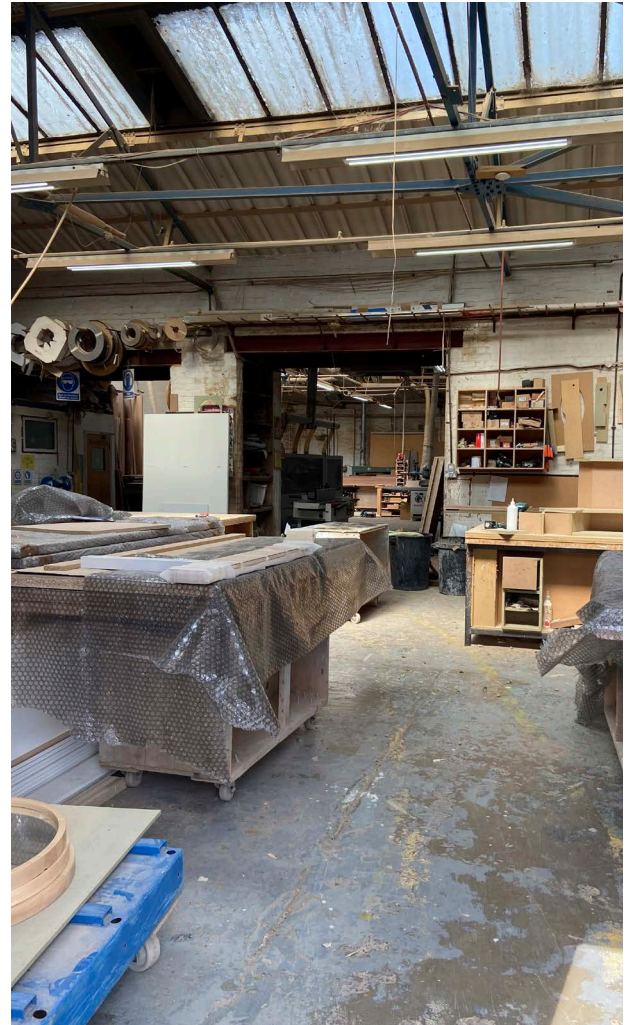
- About
- Approach and methodology

## 1.1 About

The Industrious Ealing Study has been developed to inform how Ealing council can best support industrial workspace to ensure a sustainable, inclusive and socially just economy where people, businesses and communities can thrive. It augments existing employment land evidence with a bottom-up picture of both socio-economic trends and industrial land usage towards creating positive economic change in alignment with the council's ambitions.

We Made That and PRD were commissioned to develop the Industrious Ealing Study. The study consists of two parts: the Inclusive Economy Study (Part A) and the Workspace Audit (Part B). The first element, the Inclusive Economy Study, combines socio-economic evidence with the London Borough of Ealing's strategic priorities to recommend how the borough can use projected industrial growth to reduce inequality and spread economic benefits. The Workspace Audit (Part B) is the focus of this report and builds on the evidence provided in Part A with a borough-wide mapping and analysis of industrial workspaces, businesses and jobs. The study focused on industrial workspaces and designated industrial land, and has an objective to evidence and recommend how and where the council can best support industrial workspace to deliver positive changes.

This report is intended to sit alongside the Inclusive Economy Study, building on its baseline findings throughout. Together with the demand-side analysis presented through the Employment Land Review, these three pieces of evidence should be considered together to ensure that the growth delivered by the Local Plan benefits Ealing's communities.



Woodworking business in Perivale SIL



Series of industrial units in International Trading LSIS



## 1.2 Approach and methodology

An iterative approach to research and analysis has shaped this study, which combines high level workspace and employment data with evidence of challenges and opportunities across the borough to direct on-the-ground research and test interventions.

This study seeks to provide recommendations to inform both the preparation of Ealing council's Local Plan and wider intervention that the council can make to stimulate change in industrial areas, responding to the needs of its residents, local economy and role in the wider London economy.

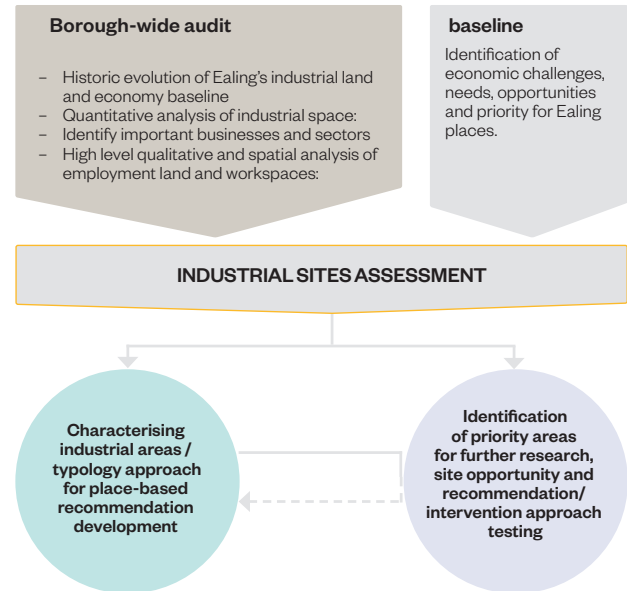
In order to make recommendations that are both place-based and which effectively leverage the recommendations of the Inclusive Economy Baseline, an approach to research, analysis and characterisation of Ealing's industrial land has been developed which combines both primary and secondary quantitative and qualitative data.

This study also draws on more ephemeral data, such as commercial and planning contexts to capture current and upcoming changes in workspace provision. As such, the findings should be understood as a snapshot in time, capturing the landscape of industrial land and employment in mid-2022.

### Borough-wide audit

To select priority areas to be studied, a borough-wide audit of industrial sites has been undertaken. Economic data gathered by PRD as part of the Baseline, market insights from the Employment Land Review and other spatial information were mapped and overlaid using GIS mapping software. Data included:

- Business registration data for businesses on industrial land (business name, sector, employment)
- Business growth
- Employment growth
- Concentration of foundational economy
- Commercial market
- Neighbourhood floor area ratio



Overview of approach

- Industrial typologies
- Claimant count

### Industrial sites assessment

Combining the findings of the borough-wide audit with the baseline, four different typologies were developed to define approaches to industrial land: Re-imagine, Intensify, Create and Protect. A scoring system was developed establishing criteria according to which the suitability for industrial land to be considered according to each typology was assessed. This system was informed by the priorities identified in the Inclusive Economy Study and used indicators gathered as part of the borough-wide audit. This is discussed further in Chapter 2.

Based both on the characterisation and on opportunities for Council intervention, four priority areas for further research have been identified. On the ground observational research, surveys and the collection of further secondary data were directed by the findings of the industrial sites assessment. The findings of this research were used to refine the definitions of the four typologies.

## 00. Introduction

### Observational research and data gathering

Four separate audits were undertaken on Bridge Road LSIS, South Acton LSIS, and Greenford and Perivale SILs over the months February–May 2022.

The estates, businesses and sectors in these areas were first mapped according to desktop research. A door-to-door assessment was then carried out to verify and fill in gaps. Information on the following was gathered:

- Name of business
- Address
- Units occupied
- Primary activity
- Type of space occupied
- Number of employees (or estimated number where unknown)

Businesses were allocated a Standard Industrial Category (SIC) code based on primary business activity. These codes were used, in conjunction with on-the-ground knowledge of operations to group businesses into 'business activity' categories which have been used to analyse the prevalence of different sectors across the study sites and as the basis of comparison with other industrial sites in London.

### Detailed surveys

Alongside the quantitative audit, researchers also carried out several longer semi-structured interviews with a number of businesses on site and representing a variety of sizes, sectors and designation status.

The aim of these interviews was to get a more detailed picture of not only business activity and employment, but also business integration in the wider economy and supply chain. Semi-structured conversations also sought to understand how the respective areas have changed and the impact or potential impact of development landscapes on existing businesses.

### Stakeholder engagement

In order to better understand both the business composition of industrial premises owned by major landowner, Segro, and their priorities and plans, two conversations were carried out with Segro representatives in March and May 2022. Insights from these discussions have been fed into the recommendations.

### Secondary data compilation

In addition to the data used for the industrial sites assessment, several sources of secondary data were used to identify opportunities for specific approaches on priority sites. This included:

- Data on unit sizes and business names and sectors on Segro owned property (provided by Segro)
- Land ownership boundaries and ownership details

Definitions and categories used to categorise and map businesses are presented and explained in Appendix.

### Development of recommendations

The research and analysis have led to the development of recommendations to support policy interventions across the borough and within the specific priority areas identified as part of the research process.

# 01.

## Context and baseline position

- Strategic and policy context
- Overview of Ealing's industrial trajectory
- Commercial property and market signals
- Key considerations



# 1.1 Strategic and policy context

## Strategic context

Ealing's situation as a key industrial land provider is inextricable from its strategic situation relative to central London, the rest of the UK and the globe. Sitting to the west of London, Ealing has historically connected London and Oxford via the Uxbridge Road, a link dating from the Middle Ages.

Pre-19<sup>th</sup> century maps indicate that parishes along the Uxbridge Road (Acton, Hanwell, Southall) also had especially good north-south road connections with smaller villages to the north (Northolt and Greenford Green), allowing for a continued close relationship between the urban centres and these more peripheral economies as they developed.

The opening of the Paddington branch of the Grand Union Canal (1801) and Great Western Railway (1836–1838) brought industry and trade with London en masse. Industrial growth was fostered with the subsequent construction of the Central Line and highways infrastructure during the interwar period.

Connectivity with Central London and beyond remains key to Ealing's economic identity in the 21<sup>st</sup> century, as it forms part of a strategic productivity arc stretching from Central London to Heathrow International Airport. Heathrow is 15 minutes to the west of Ealing Broadway, connecting Ealing's goods and people with the world. Five Crossrail stations are opening in Ealing in 2022, providing increased transport capacity from Reading and Heathrow to the West to Central London. The proposed HS2 station at Old Oak Common will also see high speed rail services to the Midlands, Scotland and the North. The proposed West London Orbital will also connect Old Oak Common with Wembley, Brent Cross and the Great West Corridor.

## Policy context

Ealing is subject to several important policies and imminent changes. Large parts of the borough are covered by Opportunity Area designation in the London Plan (2021), including Southall and Old Oak Park Royal, and have ambitious visions and capacity to deliver high levels of housing and employment in the plan period.

As part of its Local Plan review process, Ealing will be required to specify how the borough will deliver

the growth set out in the London Plan and how it will encourage development which creates employment opportunities and housing choice for Londoners. Of particular importance will be the proactive management of industrial, logistics and related uses essential to the functioning of the economy in line with national (NPPF, 2021) and London-wide (London Plan, 2021) policy.

### NPPF

National policy seeks to encourage efficient use of land. Specific reference to making use of space above commercial uses supports vertical intensification of industrial land. In areas of high housing demand, the use of employment land for homes is supported, provided this would not undermine key economic sectors or sites or the vitality and viability of town centres.

Aside this spatial intensification, the NPPF supports a shift to higher value activities, such as provision for clusters or networks of knowledge and data-driven, creative or high technology industries. Storage and distribution operations at a variety of scales are also encouraged.

### The London Plan

The plan sets out a number of policies that have significant impact on industrial development in the borough. Policy E4 requires boroughs ensure a sufficient supply of land and premises be provided and maintained taking into account the evidence in employment land reviews, industrial land audits and the potential for intensification, co-location and substitution. Intensification is defined as an increase in employment space by site area.

Policy E5 and E6 states that boroughs should set the boundaries of SIL and LSIS having regard to the scope for intensification, and to develop local policies to protect, intensify and make best use of land of SILs.

Policy E7 requires that boroughs are proactive in encouraging intensification to facilitate the consolidation of SIL or LSIS and supports optimising the potential of industrial sites for housing on selected parts of SIL or LSIS where existing capacity can be consolidated or appropriately substituted. This should be done through a carefully coordinated plan-led approach.

## 01. Context and baseline position

Overall, industrial uses include all B Class uses plus closely related uses found on employment sites (such as the sui generis uses covering vehicle repair). The introduction of the E class (2020) amalgamates light industrial and other town centre uses, requiring further distinction. Intensification increases the industrial capacity of a site. Mixed intensification does so by including a non-industrial use. Mixed-used intensification must be plan-led, contributing to Ealing council's overall industrial needs.

### Key points

In 2015, the Borough contributed the third highest amount of industrial land in Greater London. Of particular note is that most of the Borough has both excellent access to the strategic road network and connectivity to Central London and the world. It is therefore well placed to locate strategic industrial uses and the challenge is for the borough to balance its strategic land provider role and the needs to its residents and local economy.

The London Plan sets out ambitious housing targets for Ealing, while it also identifies the borough as a key industrial land provider. According to the West London Employment Land Review's (2019, and update 2022) Ealing has a net deficit of industrial space.

The proactive management of industrial uses through planning and other mechanisms will therefore be important to ensure that the borough is delivering industrial capacity — and the right type — in a context of land scarcity and high housing delivery targets.

## 01. Context and baseline position

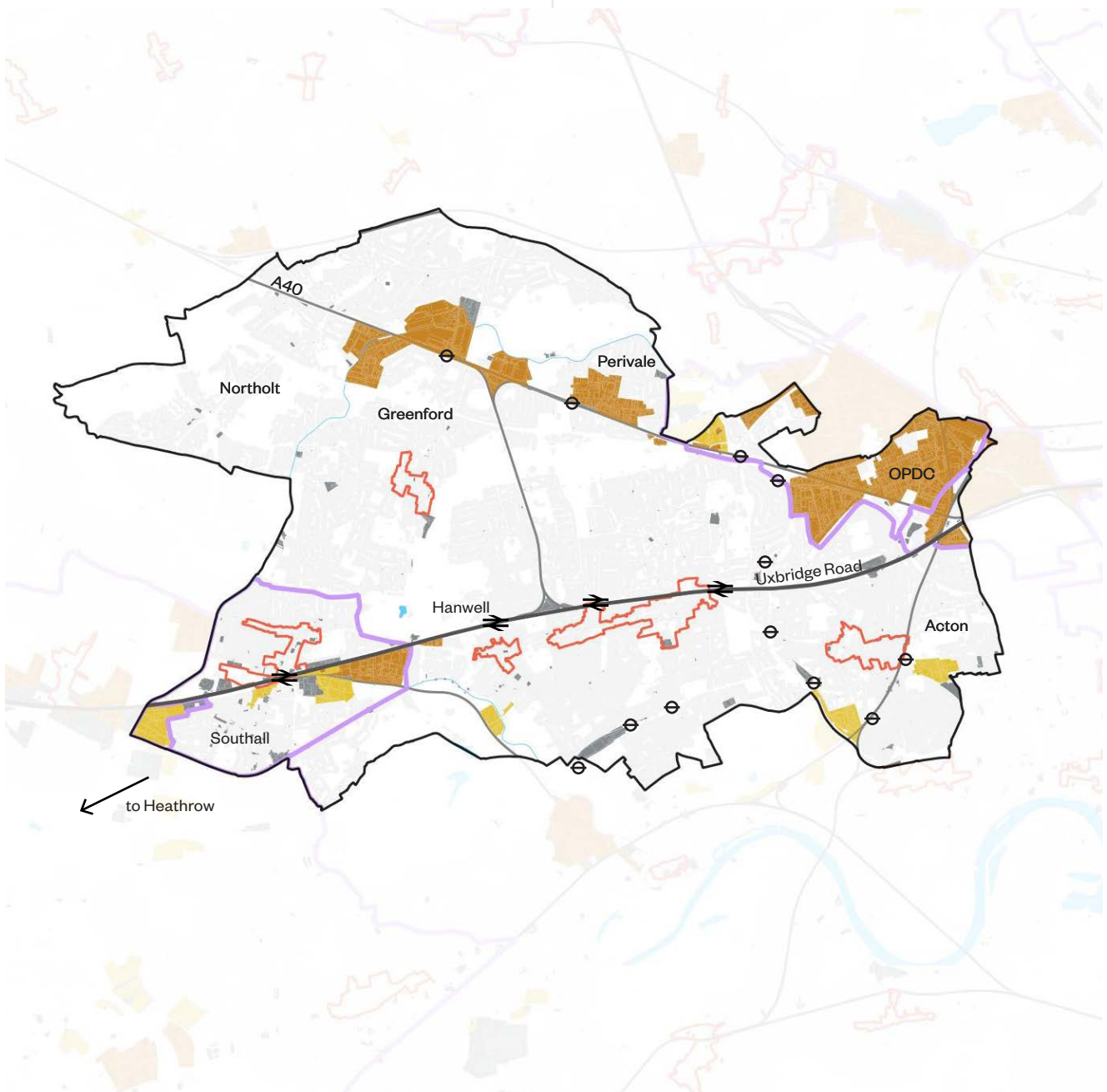
Sitting strategically to the west of London, Ealing is traversed by radial routes including the A40, Central Line, Great Western Railway and soon Crossrail.

### Key

- SIL
- LSIS
- Non-designated industrial land
- Opportunity area
- Town centre boundary
- Rail



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## 1.2 Economic context

Complex global, national and local factors are shaping Ealing's economy. Despite a decade of sustained economic growth in the capital, many Londoners have not shared in the success. The evidence base shows that Ealing faces acute challenges around inequality and that industrial land have a key role to play in addressing these.

The Inclusive Economy Baseline has worked to understand the socioeconomic makeup of the borough, its economic performance and what implication this have for industrial land. The key messages from the study have been summarised below.

**Key message 1: Housing affordability and demographic factors are economic issues and will affect Ealing's prosperity if left unaddressed.**

- **57,000** net outflow of people from Ealing since 2011
- **39%** fall in international migration 2012–2020
- **71%** of Ealing neighbourhoods fall within 20% most deprived nationally for barriers to housing and services

A significant outflow of residents since 2011 has driven stagnation in Ealing's population growth. This has primarily been to neighbouring boroughs due to a shortage of affordable housing, as access to housing has been found to be the primary driver of deprivation. If left unaddressed, this will lead to an aging population and Ealing's economic prosperity will be impacted in the long term.

**Key message 2: Ealing economic growth has been slow and the borough has underperformed in terms of job creation**

- **18,200** businesses
- **15%** business growth in Ealing since 2015
- **0%** change on employment levels since 2015

Despite higher value business growth across the borough in recent years, this is not yet generating substantial employment dividends for Ealing's residents.

**Key message 3: The quality and resilience of Ealing's employment is poor**

- **76.3%** of Ealing residents in work in 2021
- Ealing residents earn **9%** less than the London average
- **10%** increase in children in absolute low income households since 2015
- **40%** of Ealing jobs in low paying industries

Ealing's economic activity has grown in recent years but there is compelling evidence to suggest that the borough is challenged by poorly paid and insecure forms of employment. These issues were brought into sharp focus by the Covid-19 pandemic.

## 01. Context and baseline position

### What does this mean for industrial land?

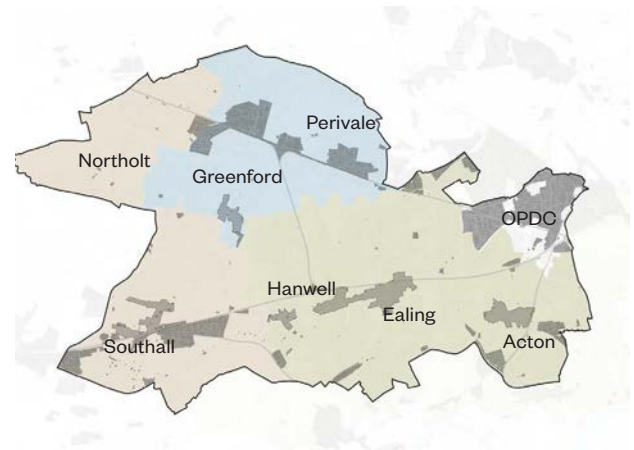
The need for housing (and affordable housing) means that the borough sits at the centre of tensions between meeting housing target and protecting economically valuable industrial space. The pressure to release industrial land is likely to intensify and the Council will have to explore creative solutions to provide both industrial capacity and housing.

Whilst it is clear that industrial land is integral to Ealing's economic identity, demand for industrial space is primarily driven by lower intensity uses such as distribution and logistics. These uses are also often providing poor quality and low paying jobs. In a context of very high demand for logistic and distribution uses, there is a risk that higher density and more traditional industrial activity will be permanently priced out by higher paying occupiers. The Council will have to explore creative solutions to both respond to the demand for low density uses and provide for other uses, to create employment, good jobs and to diversify the economy.

Borough-wide challenges also mask significant variances in area socioeconomic makeup and area performance. Understanding the geographical nuances is important to allow a more focused local response to industrial land interventions and policy.

#### Key

- Southall and Northolt
- Greenford and Perivale
- Acton, Ealing and Hanwell
- SIL and LSIS
- Town centres



Three economic areas	Key characteristics
<b>Acton, Ealing and Hanwell</b>	<ul style="list-style-type: none"> <li>- The Uxbridge Road connects the three areas that make up this geography.</li> <li>- The borough's highest value employment is hosted here.</li> <li>- Larger high street centres are key economic hubs in this geography.</li> <li>- Challenges around affordability for both residents and businesses are most acute in Ealing, Acton and Hanwell.</li> </ul>
<b>Southall and Northolt</b>	<ul style="list-style-type: none"> <li>- Challenges of deprivation, low pay and poverty are most acute in Southall and Northolt.</li> <li>- Strong foundational economies provide a significant proportion of employment in this geography.</li> <li>- This area has been acutely affected by the pandemic, especially due to a reliance on supply chain linkages with Heathrow.</li> <li>- Significant public sector assets here can provide increased influence, scope to enact change and embed political ambition.</li> </ul>
<b>Greenford and Perivale</b>	<ul style="list-style-type: none"> <li>- This geography hosts smaller town centres and industrial areas are the primary economic driver.</li> <li>- The borough's largest employers (in employment terms) are located here.</li> <li>- Major landowners, such as Segro, have particular influence in Greenford and Perivale.</li> </ul>



## 1.3 Overview of Ealing's industrial trajectory

Hosting approximately 5,112,000 sqm of industrial land, Ealing provided 7.3% of the industrial land supply for London at the time of the 2015 Industrial Land and Economy Study. Recent VOA data reveals that Ealing's industrial land supply concentrates 10% of London's total industrial floorspace.

### Ealing as an industrial land provider

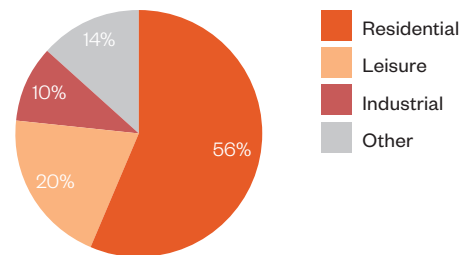
Ealing's industrial economies developed primarily in the interwar period. A combination of relatively low land values along the Brent River Valley and improved connectivity within the city and beyond meant that Acton, Greenford and Perivale attracted industrial enterprises with supply and customer chains around London and the rest of the UK. Commercial growth and concentration of industrial activity in the borough was so strong during this period that by 1940, the area surrounding North Acton at Park Royal (now managed by OPDC) had become the largest industrial estate to the south of Birmingham in terms of land area (Allies and Morrison, 2020).

The 2015 Industrial Land and Economy Study revealed that Ealing's industrial land comprises approximately 7.3% of the overall London land supply. This represents a significant floorspace loss in the period 2001-2015, with the study finding that 7.4% of Ealing's industrial land had been lost across this period. This represents a decline three times that of the benchmark rate of release. It is important to note, however, that the decline in land above the benchmark has occurred primarily on non-designated sites and has therefore not been plan-led.

It is also significant that Ealing's industrial land loss has occurred at a slower pace than that of London more widely, which exceeded 15% across the period 2001-2015 (Industrial Land and Economy Study, 2015). In fact, London's poor performance in retaining space for industry overall has played a role in condensing the pressure on Ealing's limited supply.

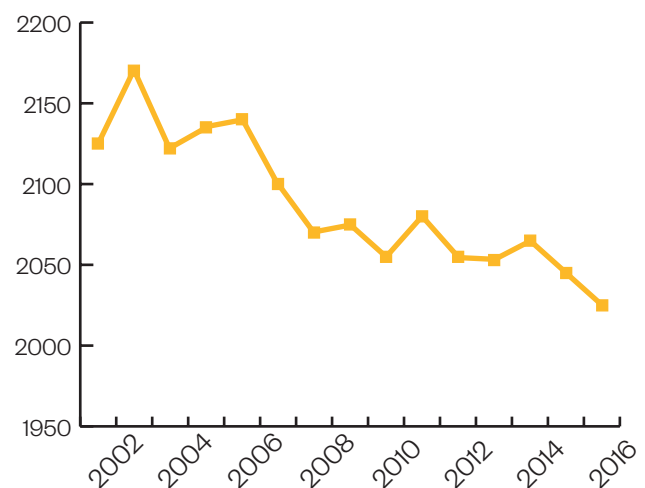
### Ealing as an industrial floorspace provider

VOA data indicates that approximately 10% of Ealing's commercial floorspace is dedicated to industrial use and that this represents approximately 10% of London's industrial floorspace overall. Across nearly the entire borough, except for Ealing Town Centre, industrial is the dominant commercial land use typology with only residential and leisure uses occupying more of Ealing's space. In Southall, Acton Greenford and Perivale, the picture is even more extreme, with industrial use representing over 70% of commercial floorspace.



Over half of the London Borough of Ealing's commercial floorspace is dedicated to residential use, and 10% to industry (Allies and Morrison, 2020)

Unsurprisingly, a loss of industrial floorspace has accompanied the land loss of the past two decades. However, this has occurred with significant nuance not captured by floorspace data alone. The loss of industrial stock on non-designated land has occurred alongside an increase in floorspace on sites designated as SIL or LSIS (ELR, 2022).



Ealing industrial floorspace change over time (sqm, 000s) (VOA/GL: Hearn 2019)



## 01. Context and baseline position

A significant share of Ealing's surface area is comprised of industrial land, hosting a variety of sectors. 45% of Ealing's industrial land is used for storage, which provides low employment densities for the borough.

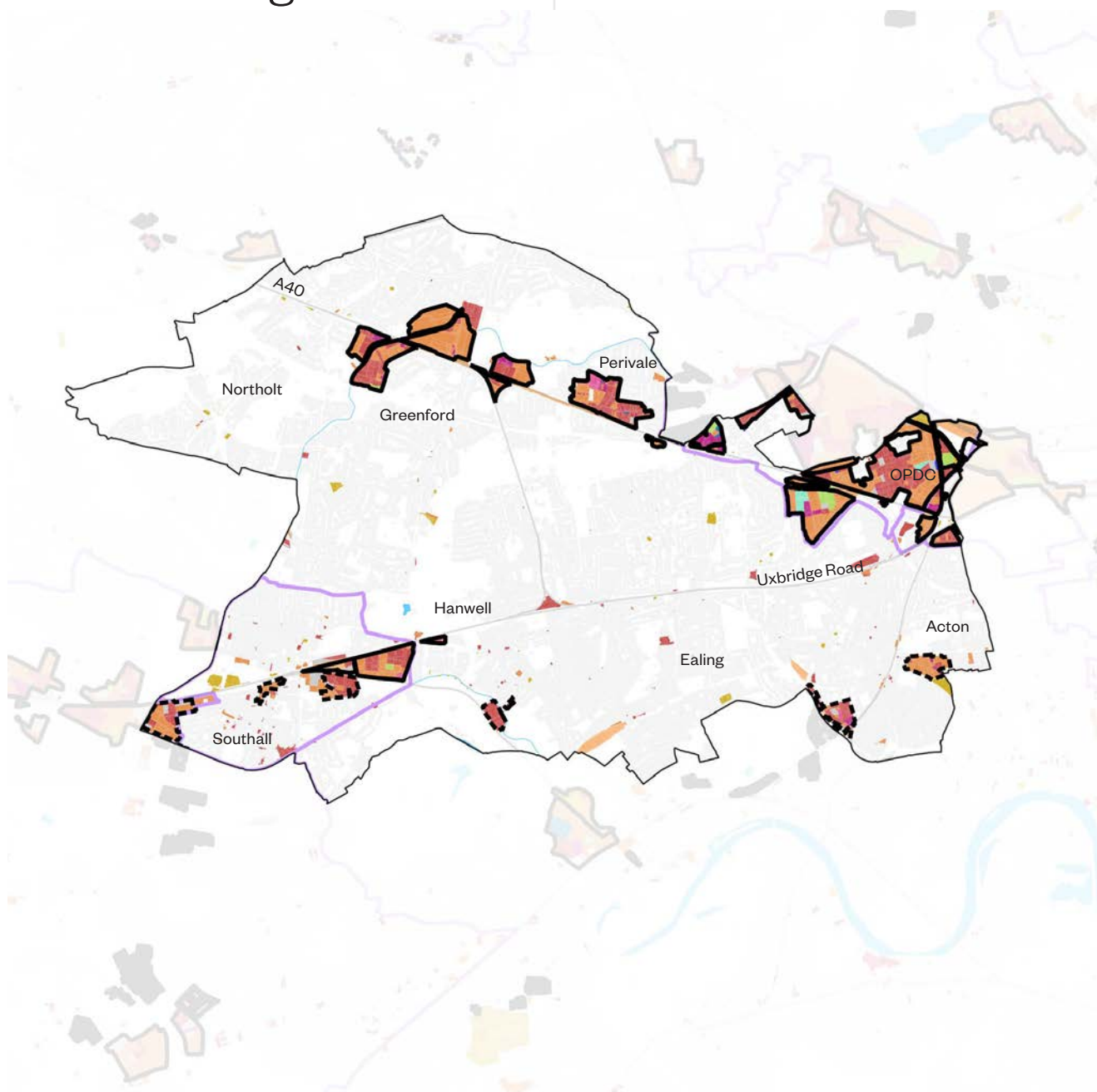
### Key

- Manufacturing
- Warehousing
- Rail
- Services
- Retail
- Utilities
- Residential

- SIL
- LSIS



0 40m



## 01. Context and baseline position

The loss of industrial floorspace documented in the past 20 years has been primarily market-led, driven by redevelopment on non-designated sites. Both commercial and political pressure to deliver housing and other higher-value uses have driven a significant and growing development churn which has primarily seen the replacement of B1c, B2 and B8 stock with non-industrial floorspace and uses.

At the same time, SILs have experienced a growth in stock since 2004 (+20%), which has been concentrated along the A40 corridor and comprises B8 use class spaces. In LSIS, the picture has contrasted. Outside of South Acton LSIS (which experienced a strong growth in stock) most LSIS have also lost B2 and B8 floorspace.

### Land area vs. floorspace

The nuanced pattern of industrial floorspace loss and delivery across designated and non-designated land in the borough highlights the importance of capturing the distinction between land area and floorspace and the relationship between industrial land, policy designation and floorspace accommodated.

As of 2015 (ILSES, 2015), approximately 73% of Ealing's industrial land supply was found to be designated, 49% at London level as SIL and 24% at local level as LSIS. The remaining 27% was found to be non-designated. According to the ELR (ELR, 2019), 41% of Ealing's industrial floorspace is within SIL, 13% is within LSIS and 46% is non-designated.

Combining the figures from the ILSES and the ELR, the 27% of the industrial land which is non-designated, a conservative estimate given the age of the data, hosts

Designation	Industrial land area (ha)		Industrial floorspace (ha)		Density
SIL	174.5	49%	60.1	41%	0.34
LSIS	84.5	24%	19.4	13%	0.23
Non-designated	93.7	27%	67.7	46%	0.72
Total / avg.	355.7	100%	147.2	100%	0.41

Industrial land area, floorspace and approximated density calculations  
sources: Industrial Land and Economy Study (2015), West London  
Employment Land Review (2019)

46% of the floorspace. This suggests an especially dense provision of floorspace on non-designated industrial land, which is confirmed by a floorspace area ratio on non-designated land of 0.72, compared with a mean across designations of 0.43. This would suggest that Ealing's non-designated industrial land is concentrating floorspace at a significantly higher density than SIL or LSIS.

A stress-test using floorspace data from the in-depth audit of non-designated industrial land sites across Southall confirms that non-designated industrial land hosting industrial functions is in fact providing floorspace at a high density. When vacant land is disregarded, 5.3 hectares of industrial floorspace in Southall are provided across just 5.8 hectares of industrial land, concentrating floorspace at a ratio of .91 hectares of floorspace per hectare of land.

### Methodology note

Land area concerns the ground area dedicated to industrial use, irrespective of buildings. This data has been captured for the 2015 Industrial Land Supply and Economy Study using satellite imagery and measured using GIS. Given that OPDC has been included in the report figures, the appx. 215 ha of SIL falling within OPDC jurisdiction has been omitted.

Floorspace concerns the total floor area of the buildings on industrial land. This breakdown by designation comes from the 2019 Employment Land Review using data provided by Ealing Council but of unknown origin.

To stress-test the density estimations provided by the existing evidence, the density calculations have been compared with a sample of land area and floor area on non-designated land observed on the ground in Southall and measured using GIS.

## 01. Context and baseline position

### Industrial stock

The industrial building stock in Ealing varies between areas and sectors of activity. While the majority of buildings in opportunity areas are composed of units built between the 1970s and 2000s, larger and more recent units can also be found — particularly on SILs and Segro-owned sites. Ealing has a higher proportion of new stock than any other borough (14%) (ELR,2019).

Manufacturing typically takes place in small or medium-sized units (<185-500sqm) usually located within managed industrial parks. Some of these units now accommodate other activities such as car repair services or offices. Some manufacturers may be located in much larger premises, usually in independent buildings with some office space.

Logistics and distribution activities often require large buildings (>10,000sqm). With increased demand for such uses in the area, many units constructed in the last decade belong to that category, often in proximity to the A40. Some businesses including vehicle hire or construction material suppliers may also occupy units with large yards used for servicing and storage.

### Vacancy and market tension

The apparent growth of floorspace within designated sites indicates that industrial policy at London level is broadly working as intended in Ealing. AAn understanding

Vacancy on industrial land has fallen in recent years, dropping from around 8% in 2010 to 3% in 2020 (CoStar, 2021). This is much lower than that of London and the UK and below what is considered to be a healthy vacancy rate (between 5% and 8%), leading to market compression and excessive rent rises.

This suggests that the market is undersupplied. Not only is this well below the rate at which industrial land release would be appropriate, but the delivery of supply is needed. The West London Employment Land Review update (2022) confirms this statement, highlighting both strong demand and declining levels of supply are constraining provision.

### What does this mean for industrial land?

The need for housing (especially affordable housing) means that the borough sits at the centre of tensions between meeting housing targets and protecting economically valuable industrial space. The pressure to release industrial land is likely to intensify, which will require a considered approach to designation in the Local Plan.

Given the high rate of industrial floorspace loss on industrial land not currently protected by policy, combined with some indicators that undesignated land currently uses space more intensively than the designated land in the borough, it is evident that interventions beyond existing policy protections are needed.

## 01. Context and baseline position

Industrial land is integral to Ealing's economic identity. All of the borough's employment specialisms are located in designated industrial areas, making their ongoing effective operation essential.

### Ealing industrial economy and employment

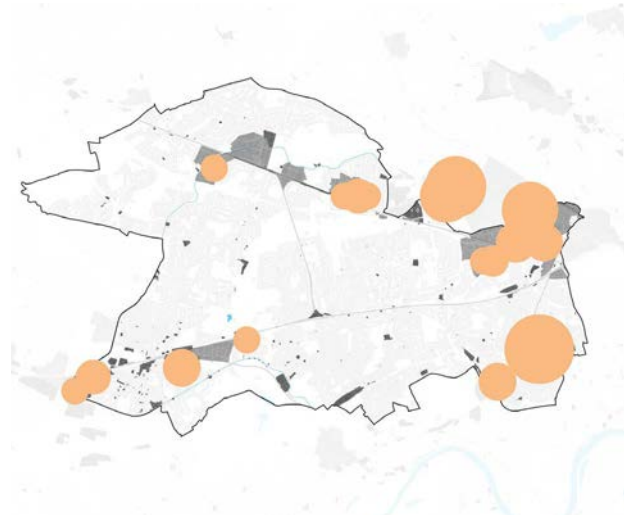
In 2021 Ealing was home to 18,200 businesses. Business growth in Ealing since 2015 has been relatively strong (15%) compared with London (13%) but lower than the national average (20%).

Despite this, since 2015 employment growth in Ealing has stagnated. Whereas the borough has seen growth in office-based activities such as Financial and Professional Services and ICT/Media/Creative Services, these sectors have shrunk in employment terms in the same period.

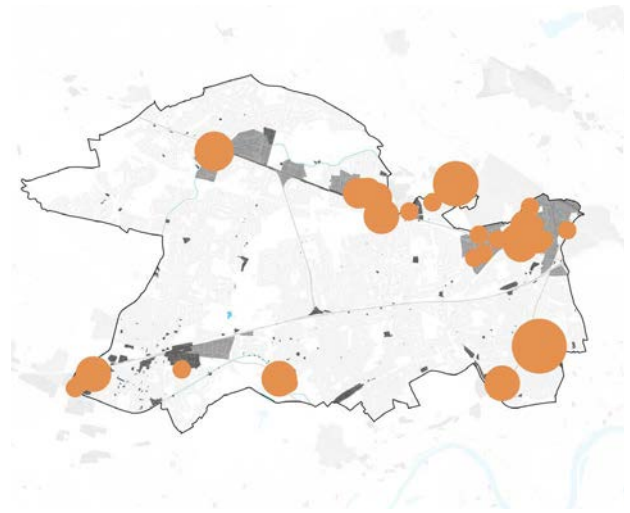
Ealing's business specialisms are in ICT, media and creative services, and retail and wholesale based on a Location Quotient of above 1.2. Ealing also hosts regionally significant employment specialisms including transport, warehousing, and logistics and wholesale. These activities are particularly concentrated in SIL, reinforcing the SIL role in the functioning of the London economy. All specialisms are the most highly concentrated in industrial land.

#### Key points

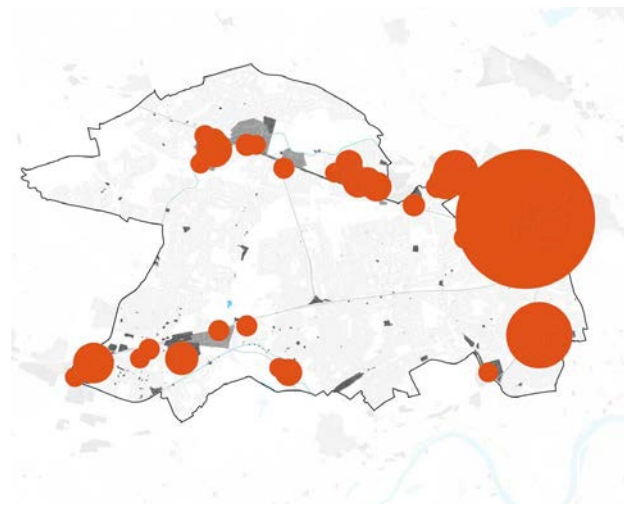
The breakdown of sectors by area reveals that these are not evenly distributed. Wholesale is concentrated around the OPDC, and logistics and warehousing along the A40. Manufacturing and car repair services are often located within LSIS areas in more affordable premises, making these businesses more at risk of displacement.



Concentration of transport activities (BRES business counts, 2021)



Concentration of warehousing and logistics activities (BRES business counts, 2021)



Concentration of wholesale activities (BRES business counts, 2021)

## 01. Context and baseline position

Designated industrial areas have accommodated most of Ealing's growth in the past 5 years. However, this has not always translated to employment growth.

### Key

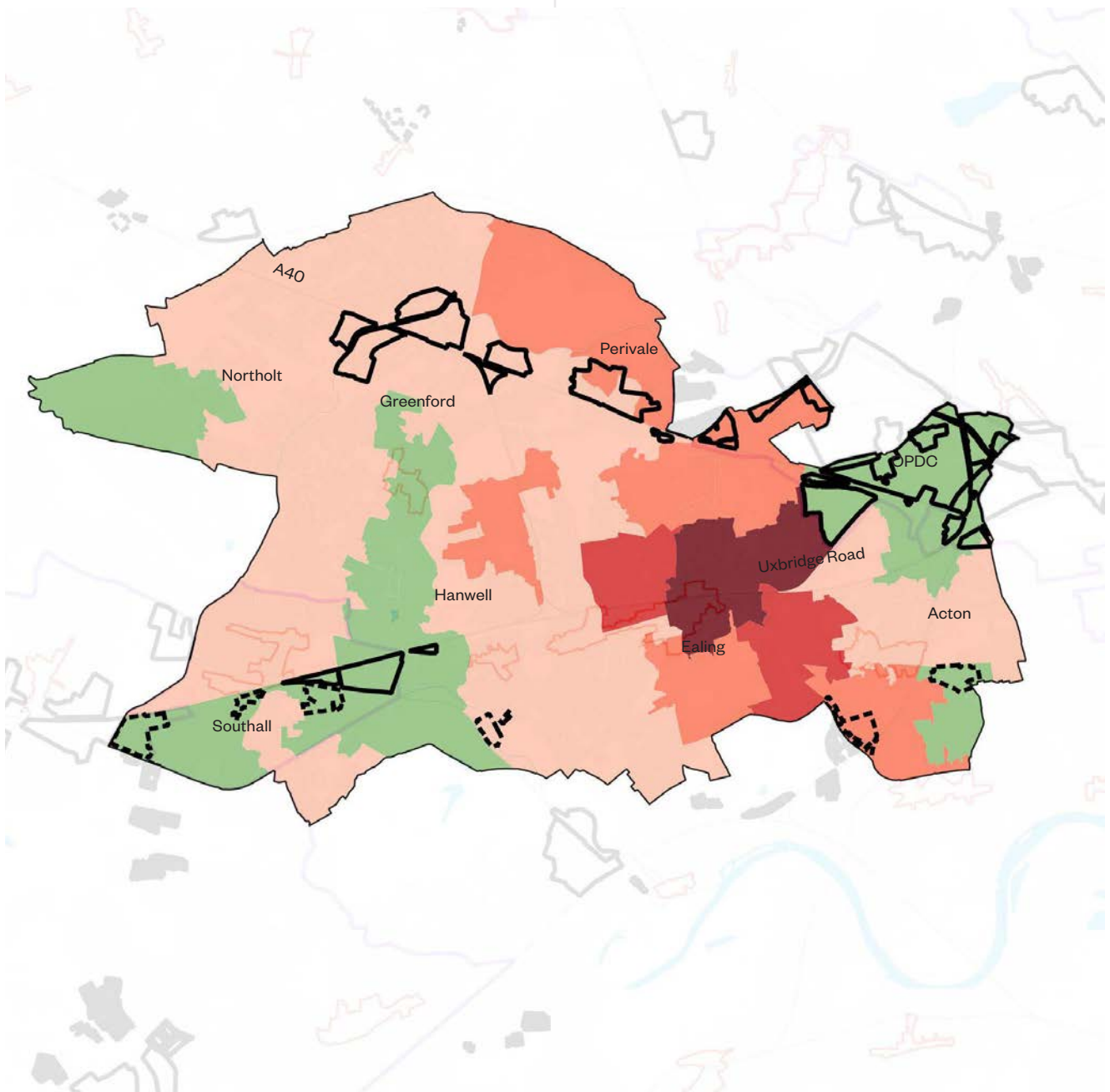
Business change by MSOA, 2017–2021  
(source: BRES ONS business counts, 2021)

- 220 businesses
- 220 to -90 businesses
- 90 to -20 businesses
- 20 to 5 businesses
- 70 to 100 businesses

- SIL
- LSIS



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## 1.4 Commercial property and market signals

Industrial conditions have rarely been stronger in the UK, with demand outstripping supply and two thirds of the current pipeline across the country already pre-let.

In Ealing, changing occupier needs are converging with specific supply conditions to generate an unprecedented squeeze on the industrial market. Despite this, Ealing has seen falling deal counts since 2011 ELR (2019), indicating a lack of suitable spaces to meet demand in the borough.

### Market trends

#### Demand for warehouses

The UK has seen growing demand for warehousing and logistics space in the past several years. The shift to e-commerce, intensified by Covid-19, has fuelled the expansion of online retail and third party logistics (3PL) businesses both in numbers and in floorspace requirement.

This has been amplified by Brexit and other macro-disruptions to supply chains, which have increased the average length of time businesses need to store goods for and therefore generated additional demand for space.

#### New industrial occupiers

In addition to existing occupiers, entirely new sectors are creating demand for industrial land as they look for large spaces in strategic locations around major cities. This includes emerging industries such as:

- modular housebuilders
- lithium-ion battery makers
- data centre operators
- film/TV production operators

The nature of the demand for the above uses and sectors are slightly more complex than that of the logistics sector. Broadband connectivity and transport access being key.

### Ealing trends

#### Historically low vacancy

According to the draft ELR, Ealing's current industrial vacancy rate is historically low (2.8%), which is significantly below that of both London (7.8%) and the UK as a whole. Vacancy under 5% tends to lead to market compression and excessive rent rises.

#### Compression at both ends of the market

The market in Ealing is squeezed on both ends. General industrial and small manufacturing businesses under 1,000 sqm are seeing rents rise and low availability of space due to the proliferation of delivery businesses and dark kitchens. Meanwhile, 5,000 sqm + 3PLs such as Amazon and Ocado are facing competition for space with data centres and film production operators. Between these size bands, Ealing is also not able to meet demand for medium-sized grow-on space needed to retain growing businesses in the borough.

#### Historically large transactions

Segro 2020 purchase of Perivale Park for £202.5 million was one of London's largest ever industrial transactions. The purchase demonstrated confidence in the demand for space in Ealing as a strategic location for new and established industrial businesses.



Segro Perivale Park, Perivale



01. Context and baseline position

Strong rental growth

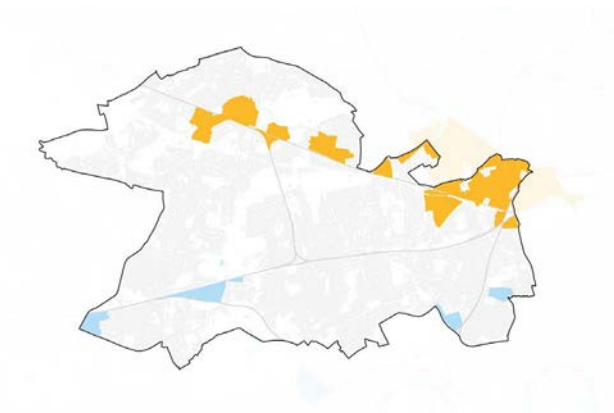
Industrial rental growth in Ealing has been strong and Ealing currently achieves among the highest average industrial rents in West London, second only to Brent.

Location	Prime rents (£ psf)	Secondary rents (£ psf)
Harrow	£14	£10
Barnet	£13	£9.50
Brent	£20	£15
Ealing	£17.50	£12.50

Prime and secondary rents across West London (source: Draft ELR 2022)

Geographic distribution of rents

Prime speculative industrial and logistics assets tend to be located in strategic locations close to good road communications, a suitable labour pool and are separated from residential areas. Prime rents are therefore broadly achieved in the SIL locations along the A40, while secondary rents are achieved in the areas south of the borough.



Prime industrial rents (gold) and secondary industrial rents (blue)  
CoStar data analysed by GL Hearn, (GL Hearn, 2019)

Key points

There is demand for both small and cheap, and large and high quality spaces. Traditional occupiers are under threat, as rents and competition for space rise. The delivery of new workspace is likely to be most viable along the A40 corridor, where prime speculative rents are achieved.

## 1.5 Key considerations

### What are the challenges?

#### Socioeconomic challenges

##### Housing affordability

Genuinely affordable housing is a key component of Ealing's economic underperformance. The demographic issues perpetuated by a lack of affordable housing will result in continued economic stagnation if not addressed.

Considering Ealing comes from a position of a net deficit of industrial land, co-locating housing on industrial land will not be considered in this study in depth. However, it is essential that the provision of affordable housing is treated in detail elsewhere, for example in the Strategic Housing Market Assessment (SHMA) update.

##### Job creation

Ealing's economic growth has been slow and Ealing has underperformed in terms of job creation. Given that much of the business growth in industrial areas is currently in low density activities such as logistics and warehousing, it will be important to identify opportunities to intensify employment while managing the growth of low density employment on industrial land.

##### Employment quality

The quality and resilience of Ealing's employment has been low with many jobs low-paying, a particular concern as a high proportion of residents work locally. The challenge will be to find opportunities to create higher paying and higher quality employment and mechanisms to shift away from less resilient carbon-intensive industries.

#### Planning challenges

##### Housing vs. jobs vs. industrial targets

Ealing is shifting from a net surplus in industrial stock in the previous plan period to a net deficit in the context of acute housing needs at a time when commercial pressure to convert property to residential uses is especially high.

More expensive and time consuming processes around consolidation and intensification will need to be deployed to meet needs.

##### Development model

The fact that traditional occupiers and job-rich uses are being priced out of the borough means that Ealing must at once provide intensified space and cheap space. Given the demand for film and logistics uses, this will mean protecting manufacturing space from both the housing market and the industrial market itself.

This may mean the requirement of cross-subsidy from housing development. If this is the case, Ealing needs to understand where the potential for intensification is and which sections of LSIS must be preserved with policy for purely industrial uses.

##### Land use policy

While boroughs have limited control over what is delivered in SIL, the London Plan stipulates that boroughs develop local policies for LSIS. Some areas will be more suitable in character than others to be intensified and these areas need to be identified and aligned with broader placemaking and regeneration objectives.

## 01. Context and baseline position

### What needs to be done?

The evidence has made it clear that public sector intervention in shaping, supporting and delivering employment space in Ealing will be essential to meeting Ealing's ambitions for inclusive economy.

This includes setting the right planning framework in addition to directing delivery and management of employment space.

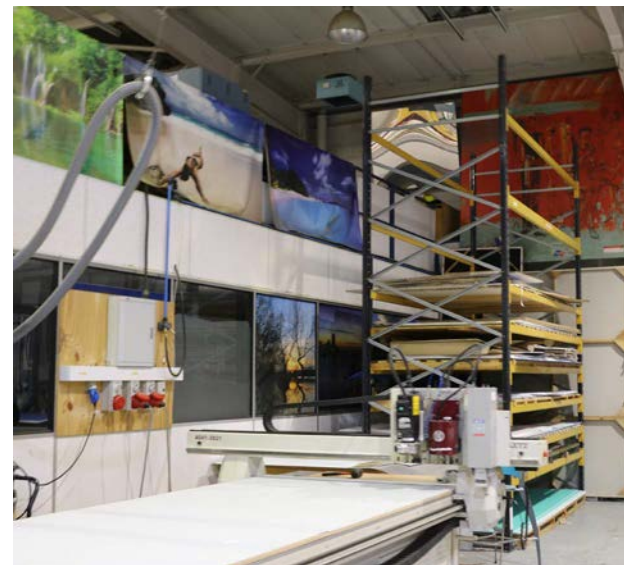
However, In order to meet Ealing's inclusive economic ambitions, interventions need to go beyond setting out the right planning framework, enabling Ealing to be a market maker in industry. This must focus on areas where innovative policy or public sector interventions are most likely to have a positive impact or where the market will not deliver on its own.



Woodwork and construction in Perivale SIL



Light industrial units within Greenford SIL



Card making and printing factory in South Acton LSIS



A mix of non conforming retail and industrial uses in Bridge Road LSIS

## 02.

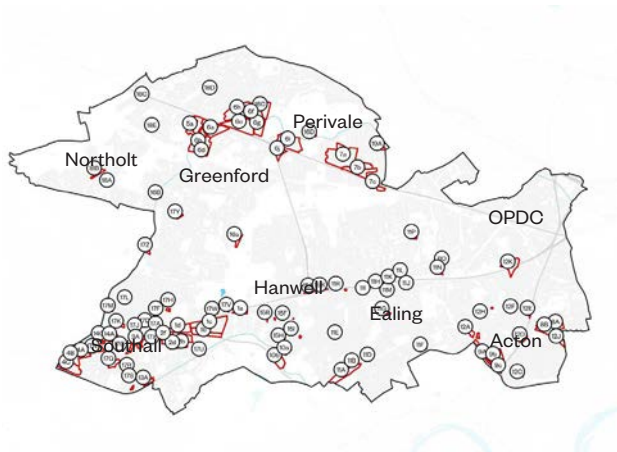
# Ealing's industrial areas

- Typology framework
- Assessment and characterisation
- Typology mapping and areas' characteristics

# 2.1 Typology framework

With a view to defining interventions that directly respond to the challenges identified by the evidence, the typology framework brings the socioeconomic data together with borough-wide spatial information. Based on this, industrial land has been assessed and characterised according to three propositional categories (re-imagine, intensify, create) and one additional characterisation (protect).

All designated and non-designated industrial land has been subdivided based on geography, typology and apparent consolidation. These sub-areas have been characterised and assessed according to the typology framework.



Key

- Categorisation number
- Boundaries

Re-imagine	Industrial areas containing low productivity economic activity that is underdelivering in terms of social or economic benefits to Ealing.
Intensify	Key economic drivers for the borough which have the capacity to grow and support more inclusive employment opportunities.
Create	Areas of the borough with strong economic need and opportunity which have the capacity to accommodate new meanwhile or permanent workspace.
Protect	Less economically significant areas but contain socially or strategically important activity which need to be retained or protected.



## 2.2 Assessment and characterisation

The typology framework brings the socioeconomic data together with borough-wide spatial information. Each typology has undergone a three-part assessment process:

### Step 1: Core scoring

Each site is assigned a score of 0–2 for each of its core indicators. Core indicators are derived from the Inclusive Economy Baseline and align with inclusive growth priorities. Totals are then translated to a percentage score.

### Step 2: Sense-check

Each site is quickly checked against a set of secondary indicators. Secondary indicators are additional pieces of information that may support a given site being assigned a typology.

### Step 3: Opportunity assessment

Each site is assessed for the opportunities for action via council-owned assets or known landowner relationships.

Each site has been assigned a score 0–2, with higher scores indicating a higher potential for characterisation according to each typology.

The indicators for each typology can be found on the following pages. A more detailed description of the scoring logic and an overview of the scores assigned to each sub-area can be found in the Appendix.

Opportunity indicators	Key questions
LBE-owned sites	Does LBE have an opportunity to intervene through assets it owns in this area?
Development sites	Are there development sites in or around this area which may be able to contribute to re-imagining/intensifying/creating employment in this area?
Sectors	Is there a presence of sectors in this area that may signal the erosion of industrial uses?
Major planning applications	Are there any major planning applications which may be able to contribute to re-imagining/intensifying/creating employment in this area?
Crossrail	Is this area within a proximity to Crossrail that suggests some of its benefits could be leveraged?



## Re-imagine

Industrial areas containing low productivity economic activity that is underdelivering in terms of social or economic benefits to Ealing.

## Characteristics

### High scores along the A40

High 're-imagine' scores are clustered along the A40 and in the borough's SIL. This tends to be where logistics and distribution uses generate a relatively low employment density.

### Low pay across the borough

The ubiquitous presence of low paying sectors, such as vehicle repair service, meant that areas across the borough scored as 're-imagine'.

### Identification of utilities

Several utilities premises and infrastructure were identified in this category due to low business growth and employment density. These were discounted in the opportunities analysis stage.

### Erosion of industrial use

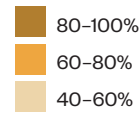
Many areas with a high presence of professional services and media, such as the eastern portion of Great Western and Ealing Studios, which contain sectors that erode industrial use.

Core indicators	Key questions
Employment density	Is this area already providing high density employment or could it do more?
Low paying jobs	Are jobs in this area in typically low paying sectors?
Sectors	Is there a presence of sectors in this area that may signal the erosion of industrial uses?
Secondary indicators	
Business growth	Sense-checked for alignment with 're-imagine' narrative.
Quality of stock	
Multiple deprivation	

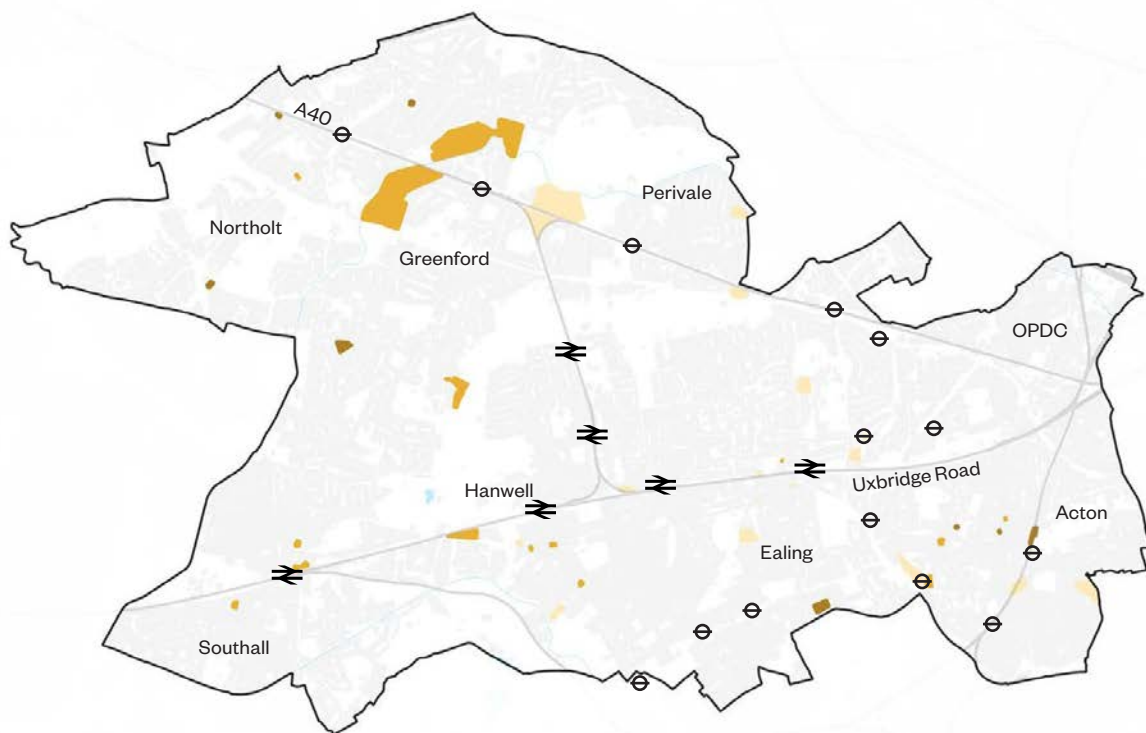
## 02. Ealing's industrial areas

'Re-imagine' sub-areas are clustered along the A40, where a concentration of logistics units currently provide low density and low paying employment.

Key: 'Re-imagine score'



Re-imagine

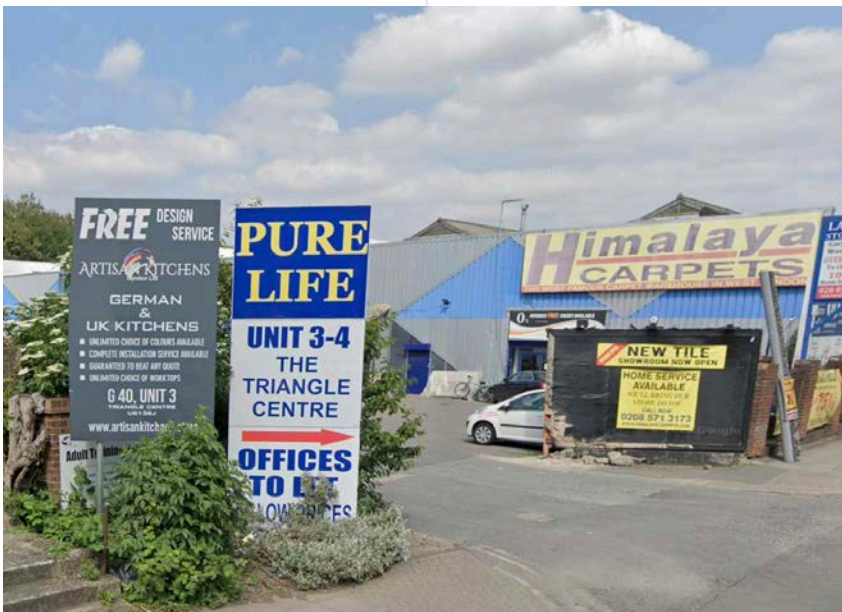




Westway Retail Park



The area containing Ealing Studios scored highly due to a presence of offices.



Eastern portion of Great Western SIL



Non-designated vehicle repair in Greenford



Utilities in Greenford



Non-designated vehicle repair in South Acton

## Intensify

Key economic drivers for the borough which have the capacity to grow and support more inclusive employment opportunities.

## Characteristics

### High scores around Acton and Perivale

High 'intensify' scores are clustered in Acton and Perivale, where current uses and links to distribution networks indicate intensification could be supported.

### Higher quality stock

Areas scoring high for 'intensify' tend to already have higher quality and newer stock, which may pose a challenge for redevelopment ambitions.

### Proximity to existing or future rail connections

'Intensify' areas tend to cluster along existing or future rail connections, with many concentrating along Crossrail routes or even already being redeveloped as part of Crossrail

### Significant presence of building suppliers

A significant proportion of 'intensify' areas include building suppliers, whose relatively low employment density and FAR suggest a need for and ability to support intensification.

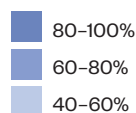
Core indicators	Key questions
Uses x intensification	Are the current uses in this area suitable for/ compatible with spatial intensification?
FAR	Does the average floor area ratio in the neighbourhood suggest ability to support intensification?
Links to distribution networks	Are the links to road and rail networks adequate to support intensified employment?
Employment density	Is employment density currently low?
Secondary indicators	Key questions
Quality of stock	Sense-checked for alignment with 'intensify' narrative
Sector resilience to Covid-19	
Sector resilience to Brexit	



## 02. Ealing's industrial areas

'Intensify' sub-areas score highest in Acton, where there is both existing high-value employment and uses compatible with intensification. Crossrail may support potential future intensification in these areas.

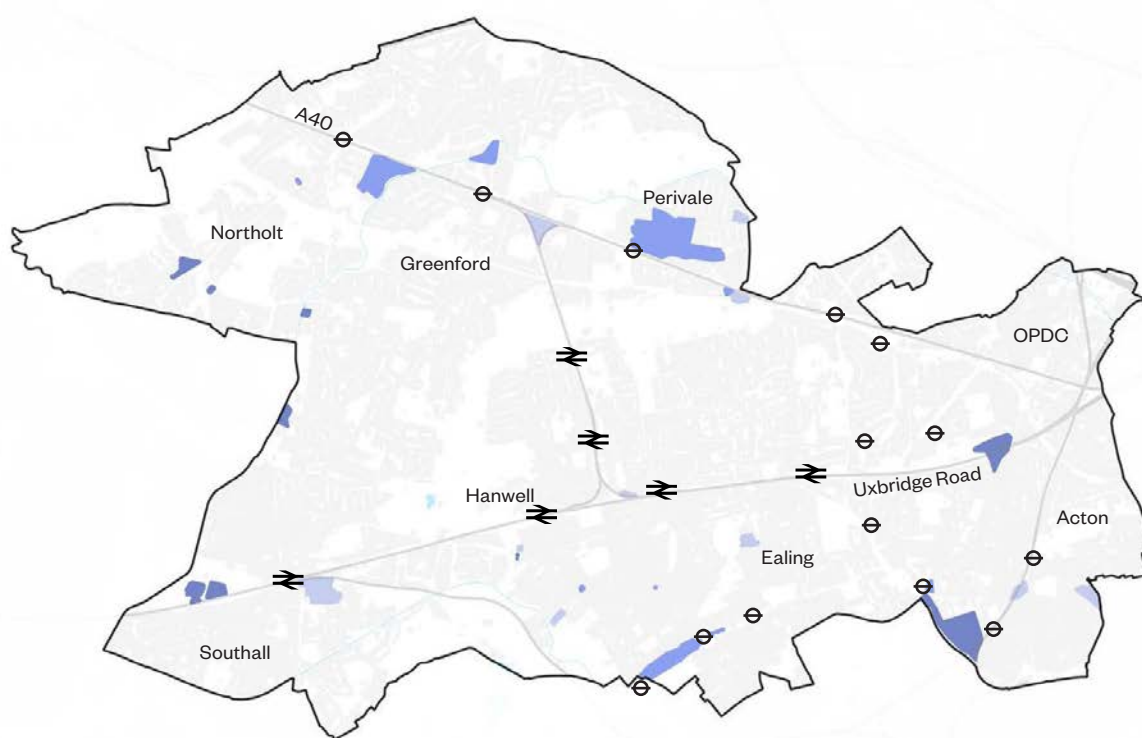
Key: 'intensify' score



Intensify



0 40m





Segro Park, Perivale



Adrienne Business Park, Northolt, scored highly on 'intensify' due to its low floor area ratio



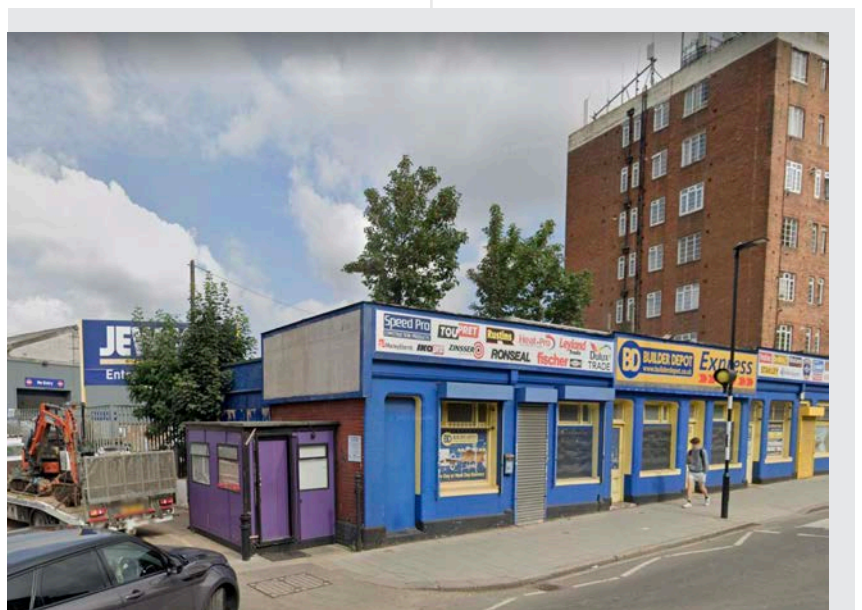
Greenford SIL



Cranleigh Gardens, Southall



Non-designated land in Southall



Non-designated land in South Acton



### Create

Areas of the borough with strong economic need and opportunity which have the capacity to accommodate new meanwhile or permanent workspace.

## Characteristics

### High scores near transport networks

High 'create' scores cluster around major road transport networks such as the A40 and Uxbridge Road. These areas also achieve relatively high rents, which is important in generating opportunity to create new workspace.

### Larger and consolidated land ownership

There is a tendency for 'create' scores to occur in areas with consolidated land ownership (such as Segro sites in Greenford and Perivale). This is likely due to links with distribution networks.

### Hosting creative industries including artists studios and film studios

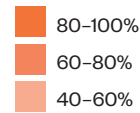
'Create' areas see seeds of existing creative networks, especially in Perivale and The Vale.

Core indicators	Key questions
Uses x intensification	Are the current uses in this area suitable for/ compatible with spatial intensification?
FAR	Does the average floor area ratio in the neighbourhood suggest ability to support intensification?
Links to distribution networks	Are the links to road and rail networks adequate to support intensified employment?
Employment density	Is employment density currently low?
Secondary indicators	Key questions
Quality of stock	Sense-checked for alignment with 'intensify' narrative
Sector resilience to Covid-19	
Sector resilience to Brexit	

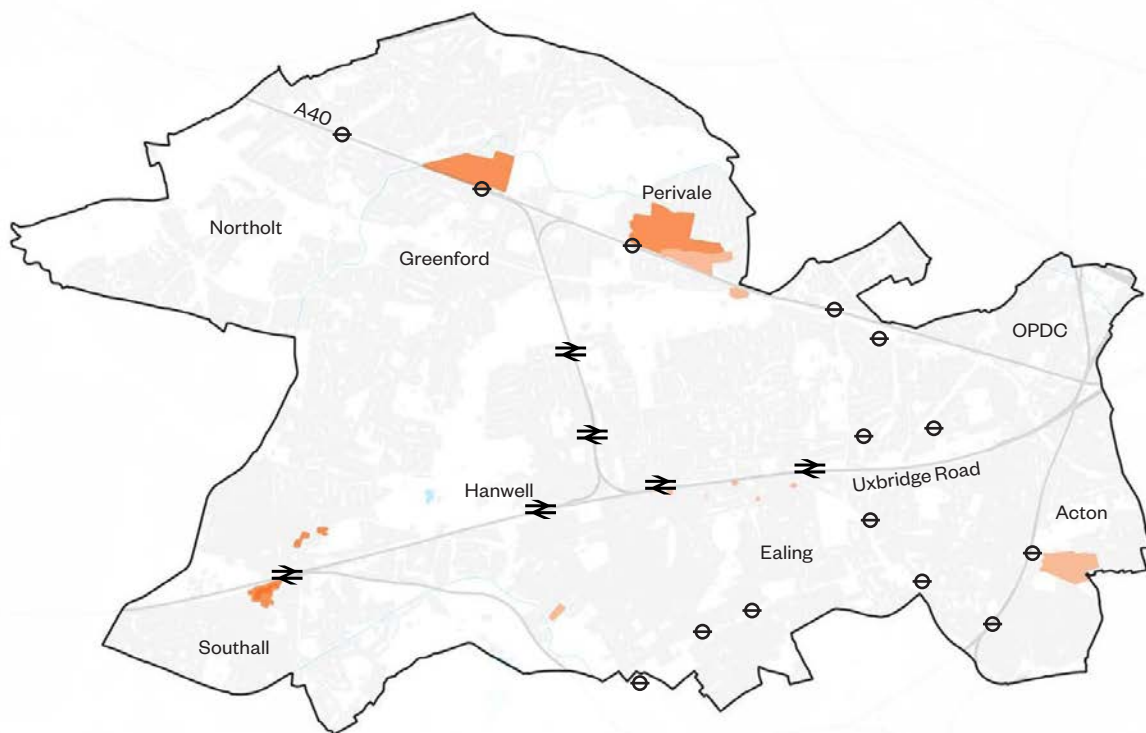
## 02. Ealing's industrial areas

'Create' sub-areas are concentrated in Greenford and Perivale. In these areas, economic need is strong and prime industrial rents suggest that new workspace could be viable.

### Key



Create

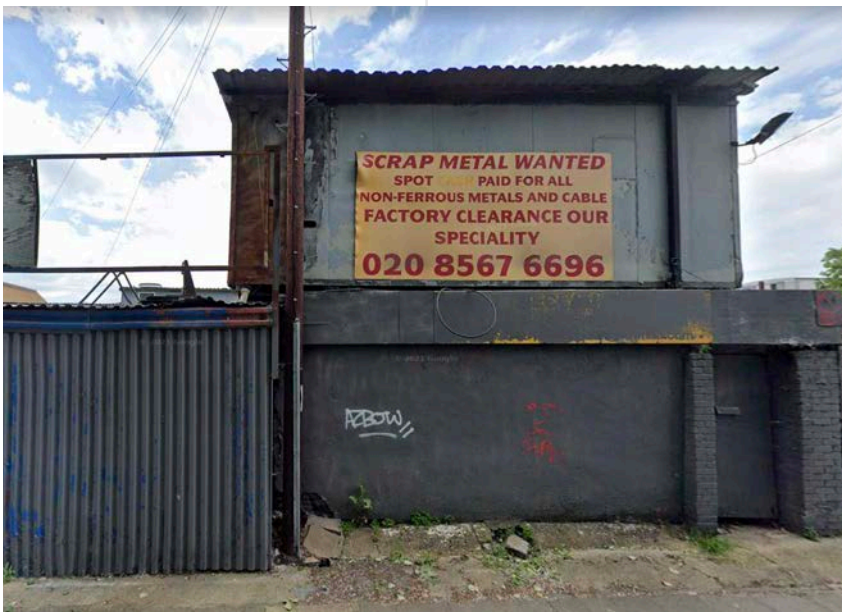




TRS Wholesale, Featherstone LSIS



The Vale LSIS in Acton scored highly for both 'create' and 'intensify'



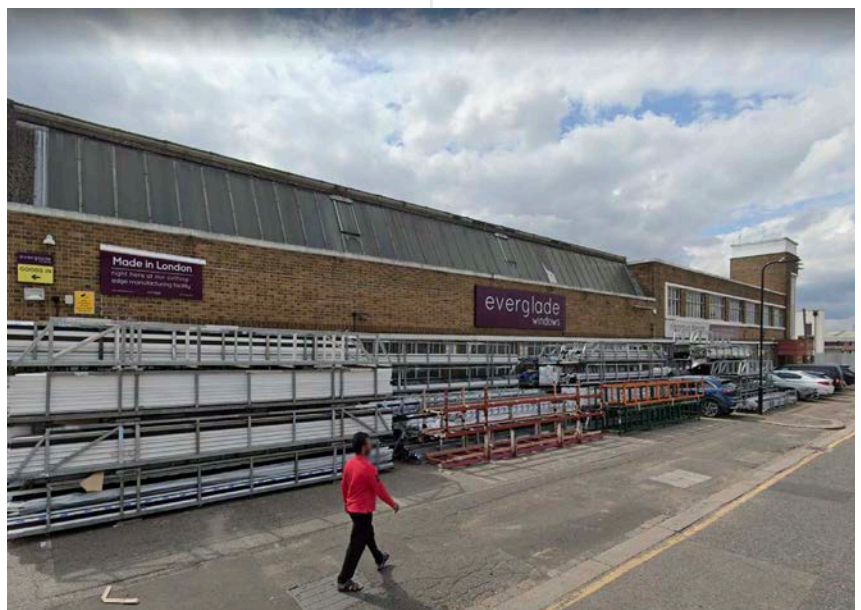
Trumpers Way LSIS



Perivale SIL (southern portion)



Wincanton, Greenford SIL



Perivale SIL



Protect

Less economically significant areas but contain socially or strategically important activity which need to be retained or protected.

Characteristics

**Small, lower quality premises hosting primarily manufacturing or foundational economy businesses**

Smaller premises and degraded stock dominate among high “protect” scores. Particularly in Southall, this land tends to host small scale manufacturing, new warehousing and retail or businesses essential to day to day life.

**Large warehouses hosting strategically important activities**

Alongside smaller premises scoring high for “protect,” areas containing large warehouses hosting strategically important activities (such as catering, food manufacturing and laundries) also score highly in this category.

**Present across the borough**

“Protect” scores can be found all across the borough, and often co-locate with other categories. This suggests that even where other approaches are pursued, protection of at-risk sectors, foundational economy employment or business growth should often be centered.

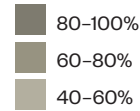
Core indicators	Key questions
Business growth	Has there been significant business growth in the past five years which should be protected?
Local services employment	Does this area host businesses that provide essential goods and services to local residents?
Sectors	Does this area host at-risk traditional industrial occupiers which should be protected?



## 02. Ealing's industrial areas

'Protect' sub-areas dominate in Southall. A high presence of both at-risk industrial sectors and businesses which provide essential goods and services suggest that some activities here need to be retained.

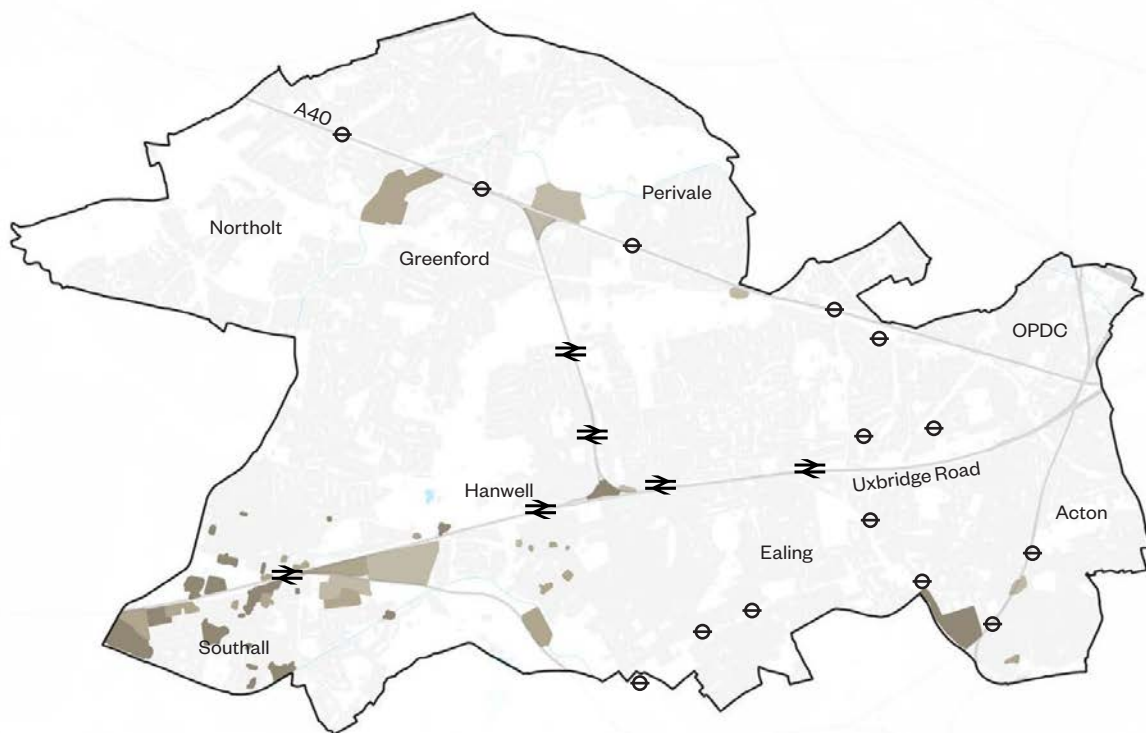
Key: 'Protect' score



Protect



0 40m







Plasser & Therer, Hanwell



Great Western, Southall. The majority of 'protect' areas are located in Southall.



South Acton LSIS



Bridge Road LSIS



Greenford SIL (southern portion)



Non-designated vehicle repair, Southall

03.

## Priority areas research

- Rationale for selection
- Greenford SIL
- South Acton LSIS
- Perivale SIL
- Bridge Road LSIS

## 3.1 Rationale for priority area selection

Four priority areas were selected for further on-the-ground research and testing: Greenford SIL, South Acton LSIS, Perivale SIL and Bridge Road LSIS. These contexts represent Ealing's different economic geographies, reflect each typology and show evidence of opportunities for Council intervention.

### 1. Greenford SIL: re-imagine/protect

Sub-areas for analysing Greenford SIL were determined primarily by geography, resulting in a mixed picture with different sections of the SIL achieving each of the typology classifications. As it concentrates the largest areas classified as 're-imagine', this site has been primarily considered through the 're-imagine' lens, with recognition that there may be some activities, especially manufacturing activities in the southern portion of the SIL, that may need protection.

### 2. South Acton LSIS: intensify/protect

South Acton LSIS scored highly for 'intensify' due to the commercial opportunity brought to the area through Crossrail, existing low density light industrial uses that appear to be broadly compatible with intensification and evidence of a presence of creative and existing sustainable manufacturing activities that could be built upon. Given it also scored highly for Protect, likely due to the presence of at-risk industrial sectors, this site has been primarily considered through the 'intensify' lens, with recognition that some activities may need protection.

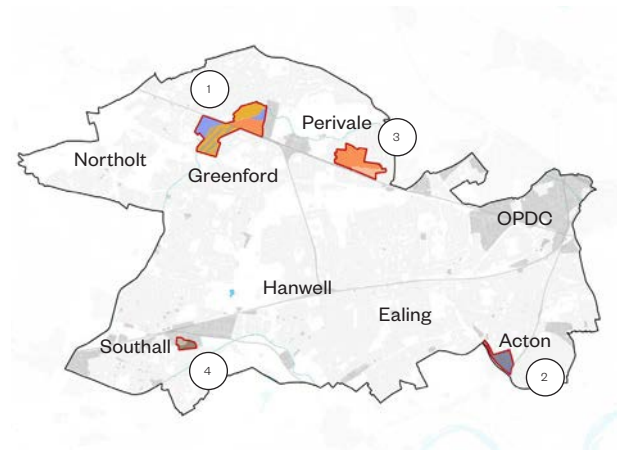
### 3. Perivale SIL: create

Sub-areas for analysing Perivale SIL were determined by an apparent functional division between the Segro owned portion to the northwest and the smaller light industrial spaces to the southeast. Both sections achieved highest scores for 'create', primarily due to the high rents achievable in the area presenting an opportunity for the market to deliver new space plus

the presence of some creative uses and knowledge economy activities that could be grown.

### 4. Bridge Road LSIS: protect

Bridge Road LSIS was divided for analysis along an apparent functional division between the area to the west of Bridge Road concentrating wholesale use and to the southeast containing some major food manufacturers. Both areas were classified as 'protect' at different intensities due to development pressures, foundational economy presence and at-risk sectors.



#### Key

- 80-100% 're-imagine' score
- 80-100% 'intensify' score
- 80-100% 'create' score
- 60-80% 'create' score
- 80-100% 'protect' score
- 60-80% 'protect' score
- Also scored a high 'protect' score
- Selected site boundaries

- 1. Greenford SIL
- 2. South Acton LSIS
- 3. Perivale SIL
- 4. Bridge Road LSIS



## 3.2 Greenford SIL

Situated within a geography that is underdelivering in terms of social and economic benefit to Ealing, but containing some evidence of both business growth and at-risk sectors to be retained, Greenford SIL has been further researched as a 're-imagine' and 'protect' typology.

Additionally, Greenford SIL has been selected as a priority area for further research based on the following considerations:

### **Low and medium quality wholesale and distribution units**

Initial spatial analysis revealed that units in Greenford are generally low to medium quality in low intensity sectors. This provides an opportunity to further investigate transformation options for this kind of scenario.

### **Prime location with good transport and road access**

Initial spatial analysis reveals that units in Greenford are generally low to medium quality in low intensity sectors. This provides an opportunity to further investigate transformation options for this kind of scenario.

### **Potential to incorporate new uses**

The departure of Brompton Cycles from this area creates an opportunity to radically rethink the economic function and identity of this area in a way that considers the potential for innovative new uses.



Bridge Road LSIS

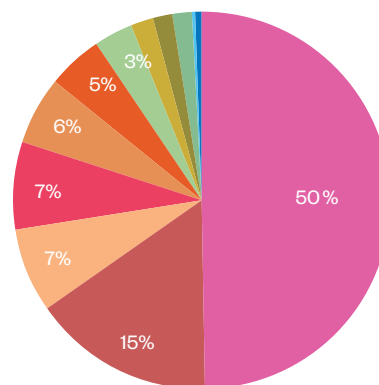
### 03. Priority areas research

Re-imagine

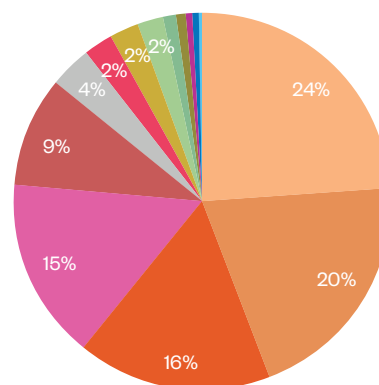
The Greenford SIL is mainly owned by Segro, with other smaller industrial estates including the Northolt area to the west of Metropolitan Park. The area benefits from a good level of connectivity by road and by public transport. Despite its status as an industrial site, nearly half of local jobs are in non-industrial sectors of activity such as services.

#### Key figures

- 185 businesses
- around 6000 jobs
- 229,000 sqm of employment floorspace



% of jobs by sector



% of floorspace by sector

#### Key

- Manufacturing
- Wholesale
- Warehousing
- Transport and logistics
- Construction
- Construction-related
- Utilities
- Vehicle sale, repair and hire
- Retail
- Restaurants, cafés
- Arts, creative industries
- Services
- Multi-occupancy
- Vacant



### 03. Priority areas research

Greenford SIL contains a large amount of floorspace dedicated to warehousing and logistics, but nearly half of local jobs are in the service industry.

Re-imagine

#### Key



0

40m





Manufacturing business on Kelvin Industrial Estate



Belvue Road, transitioning from industrial uses to residential further up the street



Large logistics warehouse, Ockham Drive



Food manufacturer, Kelvin Industrial Estate



Entrance to Belvue Business Centre, Northolt



Metropolitan Park, owned by Segro



## Employment

A wide range of businesses are found on the Greenford SIL. While they represent a small proportion of floorspace, non-industrial uses (which typically feature lower employment density) encompass a substantial proportion of jobs.

More generally, there is evidence that the jobs provided are of relatively high value within niche fields and concentrating specialty knowledge and skills such as cloud engineering and chemistry. Evidently many of these businesses, benefit from the provision of security on the Segro estate.

## Workspace

The Segro estate has evidently benefited from a high level of investment to improve public realm on-site and refurbish or rebuild certain units. The high vacancy rate observed in this area (approximately 1 in 10 units) is largely due to newly delivered or refurbished units awaiting new tenants.

To the west of Metropolitan Park, the Northolt section of the estate features a number of large units mainly used for logistics and warehousing. Smaller units to the north of these are occupied by car repair services, light manufacturing and small offices.

Parking has been reported as an issue by nearly all surveyed businesses on the Northolt site. This seems to be resulting from car repair services leaving cars in disrepair on several parking spots across the area, as well as the increased pressure of high-density employment spaces such as offices, where most employees commute by car. Parking spaces along some roads have created difficulties for circulation, especially larger vehicles needed for industrial activities

Kelvin Industrial Estate slightly anomalous as it is surrounded by much newer, higher quality Segro-owned industrial land – while neighbouring estates have undergone substantial renewal (refurbishments, newly constructed units and high turnover of businesses in past 2 years), the Kelvin estate seems to have very little changes both in terms of buildings and businesses in past 15 years.

## Developments

Some units within the Segro-owned area of the SIL have been recently refurbished or rebuilt. The only major redevelopment in the neighbouring area is the residential-led Greenford Quay scheme.






Name	Description
Fairway Drive	3 new industrial units
Greenford Quay	Partially completed build-to-rent development (2118 homes)

### 03. Priority areas research

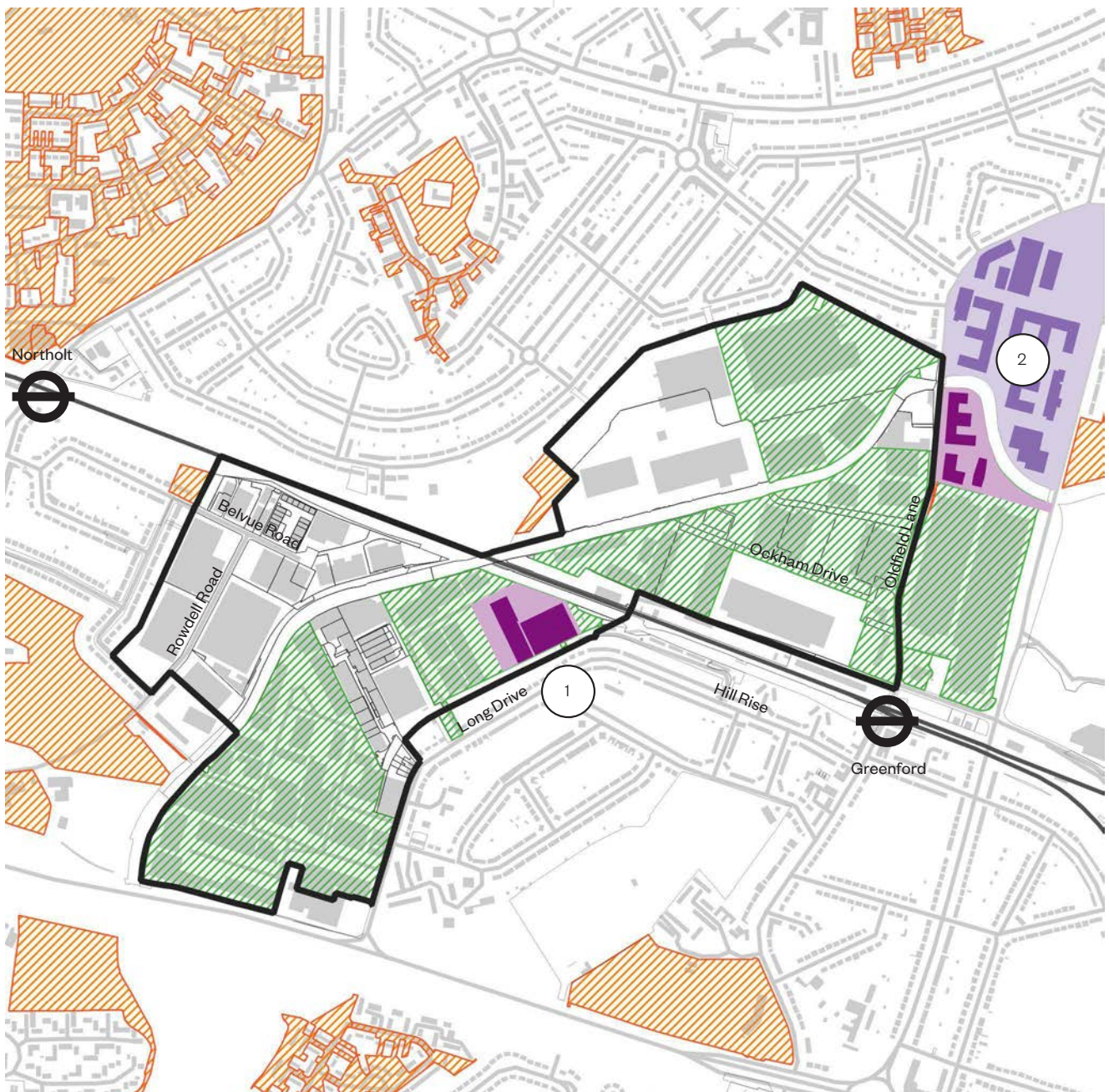
Most of the Greenford SIL is owned by Segro. A former industrial area to the east is now under residential redevelopment.

Re-imagine

#### Key

-  Planning approved
-  Completed
-  Owned by London Borough of Ealing
-  Owned by Segro
-  Study site

1. Fairway Drive
2. Greenford Quay



### 03. Priority areas research

Re-imagine

The SWOT table below summarises the key findings from the research.

	Strengths	Weaknesses	Opportunities	Threats
<b>Workspace and economy</b>	<p>Substantial proportion of newly built or refurbished industrial units especially on Segro site</p> <p>Wide range of activities including innovative businesses in both industrial and non-industrial sectors</p> <p>Several large units attracting warehousing and logistics businesses</p>	<p>Lower quality industrial areas outside Segro area with older stock and occasional poor maintenance</p> <p>Lack of security outside of secured Segro area</p>	<p>Newer high quality units may attract skilled industries</p> <p>Good professionalised security has potential to attract high value product development, manufacturing or engineering businesses</p>	<p>Non-industrial uses (especially offices) may undermine industrial character and function</p>
<b>Area context</b>	<p>Good connectivity on road, rail and underground across estate</p>	<p>Limited integration of industrial estate with residential surroundings</p>	<p>The canal could be better integrated in public realm to increase overall attractiveness of the space</p>	<p>Proliferation of office uses likely to contribute to future parking issues</p>

Table 1. Greenford SIL SWOT table.



#### Key points

It is anticipated that in the current industrial market, new and intensified employment floorspace will gradually be delivered in prime SIL locations such as Greenford through a relatively natural process as landowners upgrade stock and see the value of increasing space. Recent deliveries and market activity in Greenford, outlined in the Employment Land Review, indicate that this process may be underway.

However, encouraging this growth in a way that also supports a Re-imagining of the role and function of Greenford and Northolt SIL within Ealing's inclusive growth ambition and wider economy will involve visioning and coordination on the part of the Council.

This must first and foremost mitigate against the 'worst-case scenario' outcomes of the trajectory presented in the Employment Land Review. In such a scenario, market trends drive higher density and well paid manufacturing based employment out, to be replaced by lower density uses such as logistics and Ealing experiences an overall employment decrease. The area is already seeing the departure of high-value employment within a desired sector with the loss of Brompton Cycle's manufacturing facility.

With a significant portion of the SIL under Segro ownership, the key to anticipating challenges and working towards a new vision will be partnering with Segro towards shared objectives around employment and local resilience. This will also involve proactively understanding the evolving needs of key high value employers so that solutions to a lack of grow-on space, affordability or recruitment can be sought and companies can be kept within the borough.

## Recommendations

### **Establish a formalised strategic partnership with Segro**

Segro's ownership of a majority of the site provides an opportunity to directly and closely engage a major landowner with Council ambitions to support inclusive growth through industrial land. The Council should seek further engagement with Segro to understand future changes in occupiers, demand for space and long term strategic plans. This should include communicating inclusive growth ambitions and identifying opportunities for Segro to partner with Ealing to deliver innovation within the borough. This should especially focus on flagging issues with providing grow-on space for growing manufacturers. This has happened in other locations such as Slough and Segro park in Dagenham

### **Prioritise the creation of active travel routes through and around the SIL**

While the SIL is well connected by road, rail and underground, a large proportion of employees drive to work. This creates pressure on parking infrastructure. A coordinated focus on providing infrastructure to support active travel (in cooperation with Segro) should be coordinated with wider work on this.

### **Prioritise development proposals which support, enhance and protect both high value employment and the function of SIL**

While it is assumed that the market will to some extent shape the delivery of higher density floorspace, the Council needs to actively manage this in order to avoid the delivery of low value uses or uses which threatens the industrial character and function. Development proposals should be considered for their overall contribution to the spatial and functional mix of the SIL.

## Key considerations for future sectors and employment space typologies

Considering Greenford's strategic location along the A40 and the large, consolidated logistics and manufacturing spaces being delivered, it is imagined that the area could continue to serve as a key location for logistics and manufacturing.

However, given the typically lower-density nature of logistics space in particular, the Council is encouraged to support the delivery of medium to large scale manufacturing alongside this and/or innovate to co-locate logistics functions with other higher density small to medium scale manufacturing.

- Green logistics : Logistics constitutes 24% of the floorspace in Ealing, but provides only 7% of the jobs. It is evident that the strategic location along the A40 makes Greenford a prime location for logistics and that this sector is likely to continue to grow. To direct this growth in a way that is aligned with ambitions, the ambition should be to provide for this growth within the green logistics sector.
- High tech manufacturing: The departure of Brompton represented a loss of the kind of high value, high density and resilient manufacturing that Ealing should seek to attract. Visions for future provision should seek to mitigate the conditions that led to the departure of this anchor employer and lessons should be taken from the amenities, environment and configuration of their new location.

While it is recognised that this SIL will primarily provide the larger footprints within the borough (and that footprints will continue to grow), there is apparent scope for smaller scale light industrial and studio type spaces to the north of the SIL. These typologies can both be intensified and tend to host activities broadly compatible with the residential development occurring in Greenford Green.

## Lessons learned for other 're-imagine' areas

- In high-value areas within SIL, allow the market some freedom to deliver new floorspace
- Maintain and proactively grow relationship with key landowners, including cooperating to develop masterplans
- Directly engage with the industrial land market where possible through purchasing land on which to develop workspace in line with broader ambitions and serve as a model to improve landowner and developer confidence

## Precedents

### Green logistics (ZAC La Chapelle International)

The ZAC La Chapelle International in Paris is a mixed use development integrating residential, light industrial and office space. It will also incorporate a 45,000 sqm logistics platform for road and rail freight, covered by a green roof dedicated to urban agriculture and public amenities.



www.a26.eu

### Shared servicing yard, street activation and sustainability (Barking Industria, London)

Industria, in Barking and Dagenham, is a stacked industrial building aimed at densifying industrial uses. Vehicular access to upper levels is ensured by a helical ramp. The ground floor will be occupied by shops, a café and a business hub in order to maximise street activation.



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## 3.3 South Acton LSIS

Containing some sectors which are key economic drivers for the borough and situated in a development context which may create opportunities to support the delivery of intensified floorspace, South Acton LSIS has been researched as an intensify/protect typology.

Additionally, South Acton LSIS has been selected as a priority area for further research based on the following considerations:

### Designated LSIS

The London Plan grants specific control to Councils over their approach to LSIS. As South Acton is a designated LSIS site, in-depth research of this site allows for the testing of potential Council approaches.

### Relationship with town centre

The evidence base identifies the importance of the relationship between knowledge economy businesses in town centres and a need to establish approaches to industrial land which considers town centres. This site's clear locational benefit close to Acton Town Centre provides an opportunity to test influence over quality of place.

### Low density light industrial

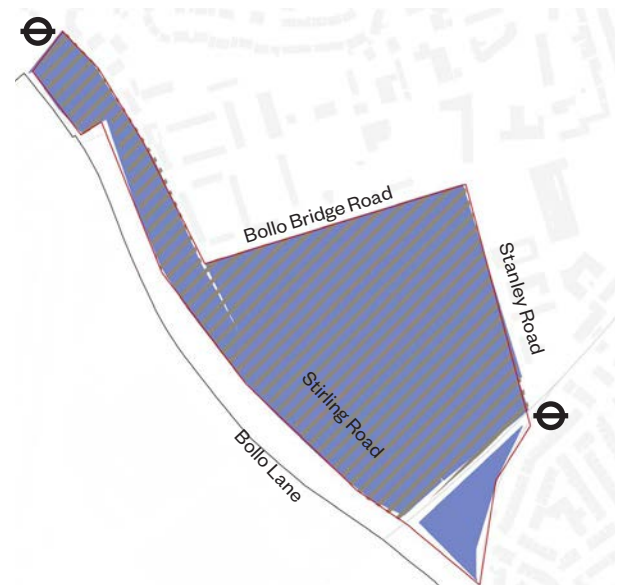
Existing uses in South Acton include low density light industrial which has potential to be intensified. There is also some evidence of industrial erosion.

### Leverage potential

Given the ambition to recommend planning and policy levers for the Council to intervene to enact change, the fact that there are a number of ongoing planning applications and potential site allocations in this area make it a suitable choice.

### Evidence of high value sectors

Initial sector analysis indicates a presence of creative and knowledge economy sectors, which would be suitable sectors on which to test intensification approaches.





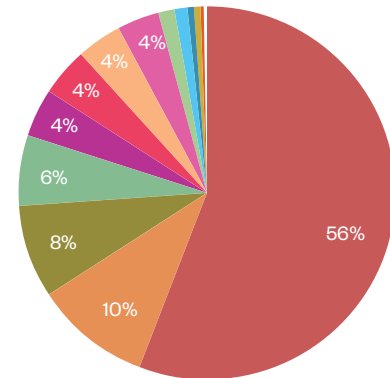
# 3.3 South Acton LSIS

Intensify

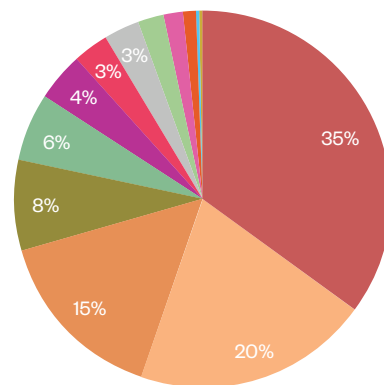
South Acton LSIS is an area of significant change, with thousands of new residential units to be delivered in the vicinity in the coming years and portions of the site currently undergoing extensive redevelopment. Once called 'Bubble City' for its concentration of commercial laundries, South Acton LSIS now accommodates a rich variety of sector specialisms in a lively and attractive urban environment.

## Key figures

- 92 businesses
- around 850 jobs
- 88,000 sqm of employment floorspace



% of jobs by sector



% of floorspace by sector

## Key

- Manufacturing
- Wholesale
- Warehousing
- Transport and logistics
- Construction
- Construction-related
- Utilities
- Vehicle sale, repair and hire
- Retail
- Restaurants, cafés
- Arts, creative industries
- Services
- Multi-occupancy
- Vacant

Manufacturing dominates in South Acton, both in terms of jobs and floorspace.



## Employment

A high proportion of South Acton LSIS' employment is within the manufacturing sector, with over half of the jobs in the LSIS in manufacturing. Some of the largest employers include two commercial laundries (MacGill and Elis) operating across three premises on the site and collectively employing nearly 150 people. Much of the other manufacturing is light industrial, supplying the area's specialist, highly skilled and creative jobs. For example, two cosmetic development companies (Fushi and Pai Skincare) have recently grown in premises on the site and provide employment specialisms ranging from chemistry to ayurvedic medicine. The area also hosts longstanding signmaking and printing businesses which provide both highly skilled design jobs and more manual and lower-paid employment. The area is also seeing the growth of new activities including dark kitchens and last-mile food delivery.

## Workspace

Warehousing and logistics activities take up a significant portion of the LSIS floorspace relative to job provision. This will soon change with the planned replacement of much of the TfL infrastructure and yards by the forthcoming Bollo lane development. Manufacturing space include both small (sqm) light industrial units accommodating product development uses to larger warehouses and production spaces which accommodate the more space intensive laundries and printers (and, importantly, their large equipment). Most manufacturing units also make use of ancillary offices, which tend to be stacked above production, storage and service spaces. However, businesses in these units report a recent decrease in the amount of office space needed, alongside an increase in storage space required as their operations grow.

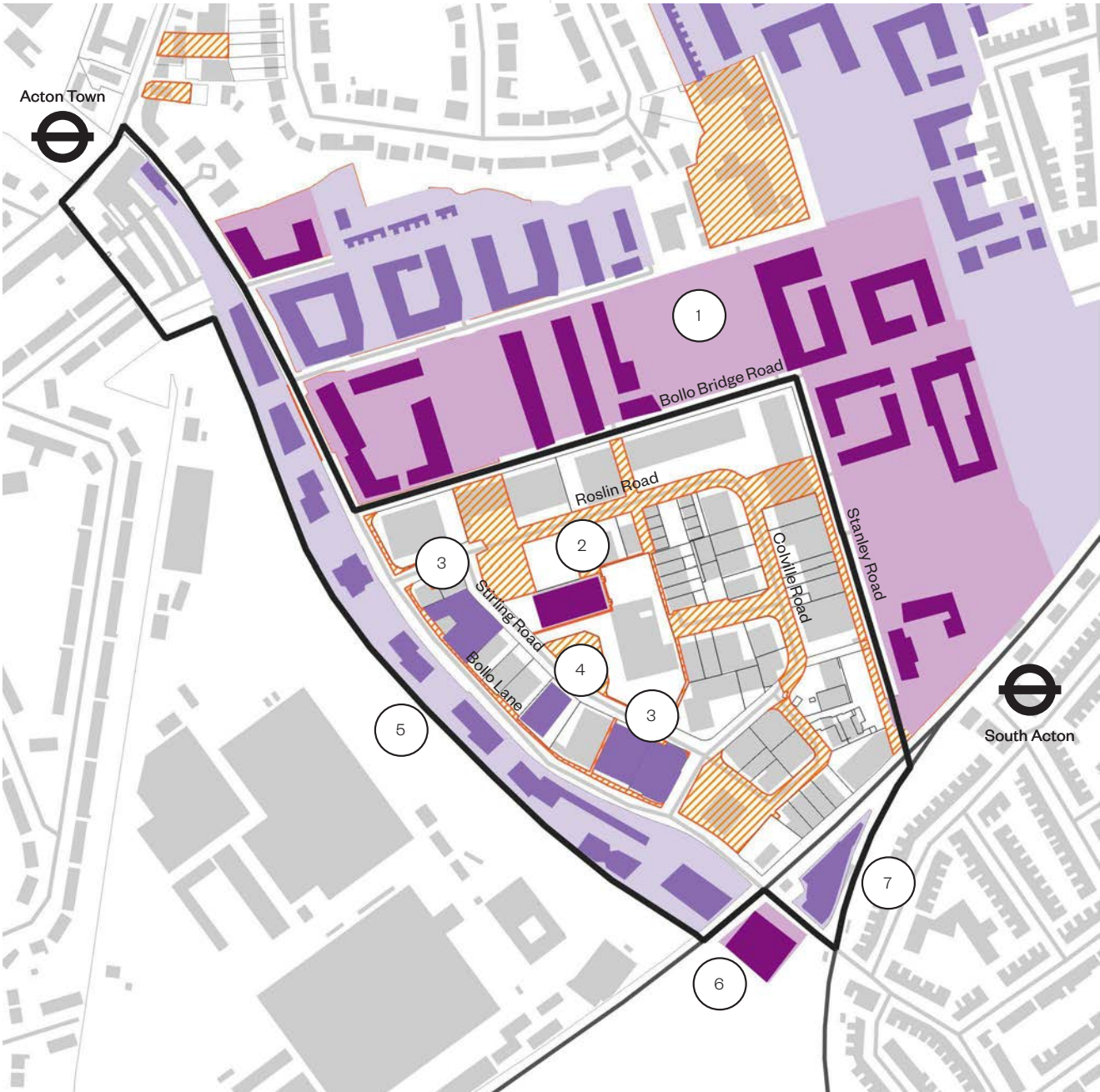
## Developments

The South Acton LSIS is undergoing substantial changes as several large scale redevelopments (usually mixed use but dominated by residential) are planned within and around the designated area.

Name	Development
Acton Gardens	Partially completed residential development with around 2,500 new homes (site adjacent to but outside of designated area)
16 Stirling Road	Newly constructed 7-storey warehouse unit
1 and 67–91 Stirling Road	Mixed use development with 237 homes and 4,100 sqm for class E use
29–39 Stirling Road	Mixed use development with 149 homes and 2,454 sqm flexible commercial space
Bollo Lane	Mixed use development with 875 homes (50% affordable), 2,300 sqm of commercial space
100 Bollo Lane	Mixed use development with 112 homes (75% affordable) and 2,760 sqm B1a floorspace
93 Bollo Lane	Mixed use development with 96 homes and 1618 sqm of E(g) floorspace

Table 2. Developments in South Acton LSIS (see map on following page)

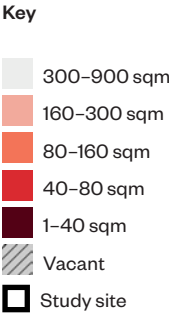
South Acton LSIS is surrounded by residential-led developments, some of which are replacing former industrial land.

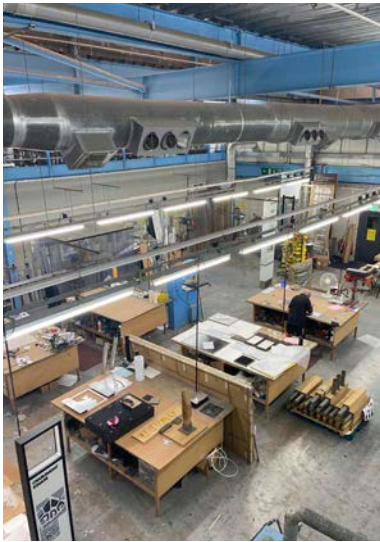




03. Priority areas research

Unlike other areas, there is a wide variety of employment densities on South Acton LSIS. Highest density mainly corresponds to manufacturing units.





Rivermeade Signs



Redevelopment along Stirling Road, with manufacturer Science Projects in the background



Marble stored outside of Marble Works



Colville Road studios



Storage outside of Hong's Food



Stirling Road



### 03. Priority areas research

Intensify

The SWOT table below summarises the key findings from the research.

	Strengths	Weaknesses	Opportunities	Threats
<b>Workspace and economy</b>	<p>Diversity of existing business ecosystem</p> <p>Strong specialisation, concentration / intense activity</p> <p>Presence of innovative and high value businesses – product development, food manufacturing, creative manufacturing + last miles logistics</p> <p>Price point</p>	<p>Lack of grow-on and storage spaces for manufacturing businesses</p> <p>Some relatively poor quality industrial building</p> <p>Evidence of recent high value business loss due to redevelopment / residential encroachment into industrial land</p>	<p>Intensification of industrial land</p> <p>Higher levels of employment density</p> <p>Population growth/ new markets</p> <p>Placemaking opportunities with ongoing redevelopments</p> <p>Use of Council owned sites along Stirling Road site as a lighthouse for desired typologies and business archetypes</p> <p>Opportunities for land consolidation across council-owned and privately owned sites</p>	<p>Multiple landownership and land fragmentation as a barrier to cohesive development</p> <p>Loss of industry that is already growing</p> <p>Lack of incentives for industries to relocate</p> <p>Higher rents in places, esp. newer units</p> <p>Small businesses' vulnerability and a number of businesses on short leases</p>
<b>Area context</b>	<p>Central location and good accessibility</p> <p>Contained/ self-sufficient environment, with good link to adjoining residential neighbourhoods</p> <p>Relatively good amenity offer and quality of public realm</p>	<p>No clear identity or role as industrial location</p> <p>Overall lack of visibility</p>	<p>New green and circular initiatives</p> <p>Establish area as a creative manufacturing and product development cluster</p> <p>Potential to create a catchment area and for the LSIS to provide uses supporting the 15mn neighbourhood vision (last mile distribution)</p>	<p>Land use conflicts and further erosion of leases</p> <p>Market pressure / residential development</p>

Table 3. Sout Acton LSIS SWOT table.

## Key points

There is significant potential for South Acton LSIS to grow its employment base, both in terms of scale and range of uses.

The area is likely to continue to be suitable to a range of sectors with a future economy based on a range of productive, creative and service activities that require a variety of business spaces, including standalone industrial buildings, distribution warehouses and small to medium size industrial production spaces.

This will present opportunities for (and require) development innovation to intensify employment activity through the delivery of space across multiple floors, the mixing of typologies and, potentially the development of more mixed forms of intensification incorporating other uses (included, but not limited to residential) which could support broader placemaking and regeneration objectives.

Overall the area should be managed first and foremost for its capacity to host conforming industrial uses. However, South Acton is both locationally and typologically suitable for more mixed forms of intensification. This has the potential to support broader placemaking and regeneration objectives, but this should be done very carefully as part of a plan-led approach underpinned by a masterplan. As part of this, residential co-location could be explored if developments deliver wider employment benefits, appropriate guidance on typologies and workspace design is provided and if it does not question the 'agent of change principles'.

## Recommendations

### **Seek the development of an intensification masterplan**

A masterplan would effectively map out sites for potential land assembly, intensification and potential shared use which can help ensure that the area's intensification is feasible, well-designed and delivered in a timely manner. Such a plan can also guide how to intensify the site incrementally which can allow business operations to continue during redevelopment.

The masterplan should ensure businesses can be clustered to strengthen commercial identity and foster a vibrant business community. This will help to develop and maintain a community where resources can be shared and deliveries and servicing would have least impact on surrounding residential development without affecting the function of the employment uses. The masterplan could clearly identify where 'softer' and 'heavier' industrial uses should be located to avoid land use conflict. The eastern side of Bollo Lane could for example provide for lighter industrial uses, compatible with a residential environment, creating a buffer between the residential buildings along the railway and the heavier industrial uses in the rest of the LSIS.

The masterplan should be accompanied by clear guidance on space typologies and design to ensure future working environments created are fit for purpose. This, together with details on operational requirements can provide a basis for planning negotiations and help to provide or increase certainty to landowners from what is expected from development and positively support the delivery of functional employment space. Public realm and servicing requirements should not be omitted as part of this exercise.



#### **Liaise with displaced or at-risk businesses regarding future spatial needs and develop a relocation strategy**

Successful growth in the South Acton LSIS should balance the retention of existing businesses with the creation of new spaces for people to work in and it is vital that business displacement is kept to a minimum if the character and economic value of the area is not to be lost. In this way, any masterplan or development scheme should achieve a detailed understanding of affected businesses needs and issues and develop a strategy that directly addresses these.

The research and audit has revealed that the area is losing anchor employers and high value businesses through ongoing redevelopment. At least 8 businesses located along Stirling Road are currently being displaced due to forthcoming development. This includes some locally embedded employers which concentrate specialised skills (small scale parts manufacturing, creative making). None have had successful conversations around relocation with the council to date. There is however still potential to support some businesses in finding a suitable space in the interim and long term to keep these jobs in the borough. Some businesses are also compatible with co-location/mixed-use schemes (e.g. creative manufacturing).

#### **Leverage Stirling Road site either as a lighthouse for desired typologies and business archetypes**

The sites owned by LBE represent a significant opportunity to innovate and deliver what the council wants to see in the area through a pilot scheme which would deliver the right mix of employment typologies, increase plot-ratios through stacking, explore options to co-locate uses, and creating additional workspace capacity on 'early win' sites. These could potentially aid business retention and relocation across the LSIS, unlocking other sites.

Options should be explored for accommodating light industrial and industrial uses while considering heights, massing, access, and servicing regarding adjacent residential and industrial uses in terms of safety, visual and sound mitigation.

#### **Focus on infrastructure provision to keep site functioning smoothly**

Infrastructure provision will play an important role in unlocking new opportunities in South Acton. Proposed interventions include transport improvements and the provision of reliable broadband, currently highlighted as an issue by some businesses, as well as key environmental improvements.

Ealing council owns most of the major roads through the estate. The introduction and enforcement of parking permits on Colville and Roslin Road in the past years has already eased congestion and improved servicing and delivery. However, improvements to Stirling Road are needed (poor maintenance currently damaging HGV lorries, pedestrian infrastructure and cycle lanes for couriers needed) and improvements could have a direct impact on attracting new enterprises and maintaining quality public realm.

### **Key considerations for future sectors and employment space typologies**

Considering current sectors' strengths and needs and the area's potential, it is envisaged that the area would accommodate predominantly medium density employment uses (small to medium batch production / small and medium scale industry and logistics) with an element of lower density employment uses for last-mile distribution and logistic. There is an opportunity for the Council to support on the delivery of innovative typologies and delivery mechanisms to achieve higher density as well as affordability, as well as an innovative mix of different employment space category (e.g. vertically stacked B1c above B2/B8). There would also be merit in exploring proposals that enable positive transition between industrial and residential areas on the outskirts of the LSIS through the configuration of site design and workspace typologies.

#### **Sectors of focus**

There is a strong opportunity to consolidate the existing creative manufacturing cluster already in places and provide spaces for the creative sector and its supply chain, including creative manufacturing, ICT, digital and media. Towards the eastern side of the LSIS and given the good quality of the premises, high-value industrial sectors (low carbon R&D facilities,

### 03. Priority areas research

Intensify

advanced manufacturing) and last mile logistic and distribution uses could be sought

- Creative design and manufacturing / printing add more on printing: The area is home to a number of creative design and manufacturing businesses which can contribute to a strong local identity for the area.
- Product development / R&D: The area is home to two organic cosmetic manufacturing brands with a need for space, including storage space. There is a potential to further attract R&D and product development businesses with a green focus.
- Last mile logistic and distribution : The area is home to more traditional industrial and distribution uses such as last mile logistics and distribution, trade counters and storage. These uses could be consolidated within South Acton.

#### Employment space typology

Given the typological diversity across the area, it is recognised that the western side of the site has capacity for smaller-scale employment units compatible with residential (light industrial and studio type spaces, shared and workshop spaces) whereas towards the centre and western side of the site, larger-scale medium and low-density floor plates could be sought and heavier uses should be promoted.

#### Lessons learned for other 'intensify' areas

- Masterplan approach needed to support delivery of intensified and mixed forms of development and steer future changes.
- Guidance, incentives and control of employment space to be delivered must be in line with understanding of local economic priorities and spatial needs
- Provision of space for manufacturing and the sort of job-rich uses Ealing wants to support is inextricable from affordable workspace and residential co-location should be explored if developments deliver wider employment benefits
- Need for both denser and cheaper space



**Intensification: Industrial Hotel, Satigny**

Industrial-Hôtels are a typology of stacked-light industrial workspaces, common in France and Switzerland. This specific Swiss example includes double-height light-industrial units at ground level with enough loading and servicing areas at the rear of the building; basement car parking; and four stories of workspaces for B1 use types, spanning workspace for uses that may have additional spatial requirements above and beyond those of office types.



**Intensification, stacked multiple space: Kaap Nord Amsterdam**

Scheme providing a range of light industrial units and flexible workspaces in Amsterdam. A central courtyard organises the loading and access in the ground floor, with free parking areas, additional roof-parking and shared servicing.

## 3.4 Perivale SIL

Located within a geography of the borough with high economic need, there is evidence that Perivale SIL has capacity to accommodate new meanwhile or permanent workspace to support inclusive economic growth and has therefore been researched as a 'create' typology.

Additionally, Perivale SIL has been selected as a priority area for further research based on the following considerations:

### **Large consolidated site owned by Segro**

A large portion of the SIL is consolidated under Segro ownership. As this is a relatively recent purchase which Segro likely has specific ambitions for, further research on this site provides an opportunity to test approaches to engaging with key landowners.

### **Clear locational benefit**

Perivale LSIS's proximity to good road access and public transport makes this a prime industrial location. Given that market conditions suggest the creation of new workspace will only be viable in areas which attract prime rents, this is a suitable location to test this typology.

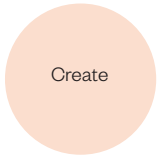
### **Presence of large scale media production occupiers**

The presence of some production companies along with BBC archives, provides an opportunity to understand in more detail the needs and dynamics of the evolving sector.

### **Diversity of typologies to the south**

In addition to a large consolidated industrial estate, Perivale SIL also contains a number of smaller units to the south east. This provides an opportunity to explore the interface between different land ownership contexts as well as the role in placemaking and public realm.

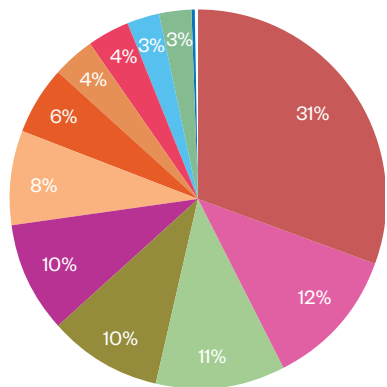




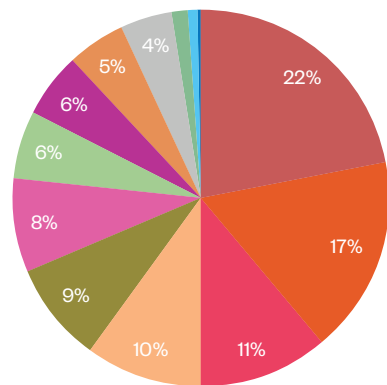
The Perivale SIL is composed of a large industrial park owned by Segro with medium to large-sized units, and of an adjacent industrial area along Bideford Avenue, Aintree Road and Wadsworth Road. It encompasses a variety of different sectors, manufacturing being the largest employer.

Key figures

- 245 businesses
- around 3400 jobs
- 230,000 sqm of employment floorspace



% of jobs by sector



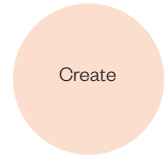
% of floorspace by sector

- Key
- Manufacturing
  - Wholesale
  - Warehousing
  - Transport and logistics
  - Construction
  - Construction-related
  - Vehicle sale, repair and hire
  - Retail
  - Restaurants, cafés
  - Arts, creative industries
  - Services
  - Multi-occupancy
  - Vacant



03. Priority areas research

The Perivale SIL is home to a large number of manufacturing businesses, although we see recent emergence of car repair services and managed workspaces.



Key

- |                               |                           |
|-------------------------------|---------------------------|
| Manufacturing                 | Restaurants, cafés        |
| Wholesale                     | Arts, creative industries |
| Warehousing                   | Services                  |
| Transport and logistics       | Multi-occupancy           |
| Construction                  | Vacant                    |
| Construction-related          | Study site                |
| Vehicle sale, repair and hire |                           |
| Retail                        |                           |



## Employment

Perivale has a varied distribution of sectors of employment, with 31% of jobs in manufacturing. Several manufacturing businesses had a long presence on-site (more than 20 years). MOT and car repair businesses seem to be a relatively recent sector that has been expanding substantially, currently accounting for 1 in 10 jobs in the SIL. Another recent trend has been the arrival of workspace providers such as Sabichi and Biz Space, which has in turn led to a limited amount of floorspace being used as offices.

## Workspace

The Segro site mainly contains larger, more recent units while the eastern part of the estate is made of largely 20<sup>th</sup>-century industrial buildings. Aintree Road has a primarily industrial character (with a majority of businesses related to manufacturing or car repairs), but also constitutes an important local route (between Perivale Station and Bilton Road). As such, it features a relatively high footfall for an industrial area, and contains several food and drink establishments. It is therefore more integrated to the neighbouring residential areas than most other industrial estates studied in Ealing.

Parking reported as an issue by virtually all businesses, some longer established businesses arguing the situation has worsened since the arrival of car repair services (evidence of ‘dumped’ cars around the area). The car pound leads to people queueing outside during working hours (a dozen at time of visit), leading to a very localised but significant issue, as lack of public facilities, such as toilets and bins, causing littering and nuisance.

## Developments

The only development currently planned in the vicinity of the Perivale SIL is a small scale residential scheme on a former brownfield site.

Name	Description
4 Bilton Road	Residential redevelopment of brownfield land (105 homes)

Table 4. Developments in Perivale SIL (see map on following page)

### 03. Priority areas research

The Perivale SIL is divided between a large Segro park and a series of small and medium sized industrial units.







Yard storage, Walmgate Road



Traffic on Bideford Avenue



20th century building at 22 Wadsworth Road



Intersection between Bideford Avenue and Wadsworth Road



Stone specialist business



Small units at the end of Wadsworth Road



### 03. Priority areas research

Create

The SWOT table below summarises the key findings from the research.

	Strengths	Weaknesses	Opportunities	Threats
Workspace and economy	<p>Diversity of existing business ecosystem and building typologies</p> <p>Increasing presence of workspace providers providing highly flexible spaces from offices to light industrial to warehousing spaces</p> <p>An attractive business location with only 4% of vacant employment floorspace</p> <p>Cluster of media related businesses within Segro site</p>	<p>Older building stock outside Segro area with occasional poor maintenance</p> <p>Poor maintenance of public space, aggravated by abandoned cars and littering</p> <p>Lack of public facilities affecting local customers and visitors of the car pound</p>	<p>Workspace managers can foster SMEs to diversify industrial activities on site</p> <p>Presence of construction-related activity (much of it specialist and creative) could seed growth of green construction industry</p>	<p>Multiple landownership and land fragmentation as a barrier to cohesive development</p> <p>Car repair services can degrade overall attractiveness of industrial estate by encroaching on parking space to leave abandoned cars. Workspace managers may erode industrial use if primary focus is on providing office space and not warehouse or manufacturing space</p>
Area context	<p>Accessibility to A40 and proximity to train station</p> <p>High footfall on Bideford Avenue and Aintree Road contributing to street level activation</p>	<p>Lack of permeability west of Wadsworth Road impacting on local accessibility</p> <p>Few amenities for employees. Restaurants along Aintree road do not cater to local employment base and lack of toilets causing nuisance.</p>	<p>20th century industrial buildings enhance the area's character and seed an attractive workplace.</p>	<p>Poor broadband connectivity causing businesses to consider relocating.</p>

Table 5. Perivale SIL SWOT table.

## Key points

It is assumed that new employment floorspace within the Perivale SIL will be delivered through a relatively natural process. Low availability of suitable spaces will continue to push rents up. As older buildings, prevalent across the Perivale SIL, become progressively outdated and no longer fit for purpose, high demand and increasing land value in the area will likely encourage developers and landowners to maximise the revenue potential of their properties. This may take the form of standard redevelopments, infill developments, vertical and horizontal extensions.

A survey of planning applications reveals interest in creating additional B2/B8 floorspace and/or changing use from B2 to B8, indicating that this process is underway. Principally this should seek to deliver intensified industrial activity first within the SIL, both improving current stock and adding additional floorspace either through better utilisation of sites or multi-storey development.

Ideally located with access to a strategic road network, SIL is generally expected to deliver industrial space for smaller occupiers concentrated in larger developments (such as Industria). Floorspace delivered in Perivale should be flexible to allow the accommodation or relocated businesses from elsewhere in the borough as well as deliver high quality space responding to the requirements of modern businesses.

Parking will be an acute issue on this site as long as the vehicle repair services specialised in accident repair (especially breakdowns along the A40) are located here. This will only worsen should new employment be created on the site. Initiatives to intensify parking and vehicle storage should be incentivised, primarily through more stringent regulation and enforcement of parking. However, any major changes in parking must also occur in combination with public transportation and active travel route improvements.

## Recommendations

### Set out a clear vision and development framework

Considering current development pressures and emerging propositions coming forward from the market, there is an urgency in setting out a clear vision and development framework for the area to ensure that it maintains its specific industrial character, and continues to fulfil his role as a key employment location which participates in the creation of high value local employment.

### Consider investing in vacant properties to take a more active role in workspace delivery

There is currently a vacant site at 11 Aintree Rd which has potential to build on existing local specialisms in construction, food manufacturing or film and media to support inclusive economic growth. The Council should consider the feasibility of investing directly in this property to create and deliver new employment space and set an example for the future creation of workspace on the SIL.

### Develop site specific development studies for key locations of opportunities within the SIL

To set the tone for the kind of delivery preferred, and to show developers what can be done/establish confidence, site specific development studies for key opportunity locations should be sought. This can provide further detail on operational requirements and provide a basis for planning negotiations. This can help to provide or increase certainty to landowners, from what is expected from development and positively support the delivery of functional employment space.

### Develop strategic partnership with Segro

Segro's recent purchase of the Perivale Trading Estate prevents an unprecedented opportunity to directly and closely engage a major landowner with Council ambitions to support inclusive growth through industrial land. The council should seek further engagement with Segro to understand future changes in occupiers, demand for space and long term strategic plans. This should include communicating inclusive growth ambitions and identifying opportunities for Segro to partner with Ealing to deliver innovation within the borough.

#### **Focus on improving key routes through the SIL to improve traffic, pedestrian connectivity, public realm and safety**

Several recent fires have severely impacted business operations and continue to impact business confidence in the Perivale SIL. Many businesses report that improper and unenforced parking contributes to this hazard. Moreover, vehicle congestion along Aintree and Bideford Roads, in large part caused by travel to John Fisher Primary School to the north of the site, also impedes servicing along these routes. As Segro owns many of the routes and connecting infrastructure, the Council should incentivise them to manage parking and create more legible pedestrian routes to the school. This will require innovative rethinking of vehicle repair services, many of whom use these regular through-routes to store vehicles.

#### **Key considerations for future sectors and employment space typologies**

It is anticipated that this area has capacity to accommodate new meanwhile or permanent workspace that could support the council's ambitions for inclusive economic growth. Given the presence of some key existing vacant sites outside of Segro ownership and which have the potential to achieve prime rental values, there is an opportunity for the council to take an active role in either buying land and developing new workspace or in setting requirements for the type of development to come forward on this site through site allocation in the Local Plan. There would be particular merit in exploring proposals for

this site which deliver workspace in green construction or manufacturing industries.

#### **Sectors of focus**

Engagement with Segro reveals a consistent picture with regards to sector presence on Perivale Trading Estate as well as a general plan to maintain sector focus. This includes:

- Creative, Media and ICT: In particular, the site hosts several large film broadcasting studios and the BBC Archives. It will be important to retain and grow these uses at this location due to its role

within a larger media and creative cluster in West London. With increasing competition for the large sheds of this type due to the growth of production companies, it is anticipated that this will be relatively straightforward.

- Food manufacturing: A few manufacturers of food, specifically nuts and other snack foods, are rooted in Perivale. Those that supply major supermarket chains have specific requirements around security, surveillance and operation management. This makes Segro a suitable player in delivering and managing the space.

Outside of Segro ownership, the site contains two further sectors with the possibility to seed inclusive growth approaches in the SIL. This includes:

- Construction, contracting and bespoke home fittings: A large presence of construction, contractors and skilled. Any attempts to green the focus of the SIL or provide workspace focused on environmental sustainability could focus on the presence of these sectors and potential for greening business models through upskilling/ product innovation or facilitate the circular economy.
- Serviced office and artist workspaces: While development within SIL should always be industrial-led and should not contribute to a net loss of floorspace, the presence of serviced office providers such as BizSpace and artist studio operators suggests a demand for typically more intensive and high-value office-based uses may be present should an appropriate context to leverage the value of these uses towards delivering new workspace be sought.

#### Employment space typology

The SIL is typologically diverse, with stock within the Segro estate having substantially larger footprints and floor plates supporting media and manufacturing needs. This area should be retained at this scale with footprints potential even growing based on conversations with Segro. This should be balanced with the continued provision of smaller scale workshops for construction and light industrial activities to the east of the SIL.

It is recognised that Aintree road has the potential to behave similarly to a high street given the volume of traffic through the area and the demand for amenities by workers. Therefore, new developments along this road should plan for as much street-level visibility as possible and to attract activities which could provide attractive public activity and raise the profile of the local area. It is also recognized that land to the south of Wadsworth Road and east of Wadsworth Close provides open storage for large vehicles and equipment, which can be retained.

#### Lessons learned for other 'create' areas

- Initiate and grow relationships with key landowners and ensure strategic ambitions are considered in their planning. Leverage ownership of key routes and infrastructure towards supporting wider initiatives for connectivity and placemaking
- Consider participating directly in the market by identifying and purchasing vacant properties on which to develop visionary meanwhile or permanent workspace
- Maintain a clear vision for the kinds of workspace that could support inclusive growth ambitions (focus on green innovation, creative or knowledge sector) and ensure Council intervention opportunities support the delivery of this kind of space

#### Precedents

##### Space for sustainable manufacturing (Greenbizz Brussels)

2500 sqm incubation area and 5000 sqm workshops focused on manufacturing green building materials and innovating in sustainable construction . Cofinanced by an anchor tenant and environmental management institute.



##### Stacked parking (Parkplus California, Los Angeles)

The recent influx of car repair services has caused parking issues partly due to the large number of cars in disrepair left on parking spaces. Stacked mechanical parking could address the lack of yard space for local car repair services in order to store vehicles.





## 3.5 Bridge Road LSIS

Dominated by less economically significant activity but containing some at-risk industrial sectors and businesses within the foundational economy, Bridge Road LSIS has been researched as a 'protect' typology.

Bridge Road also scored relatively highly (60%) for 'create.' However, Bridge Road LSIS has been selected as a priority area for further research based on the following considerations:

### Area of business growth:

Initial analysis indicated that businesses have grown in Bridge Road in the 5 years. Further research creates an opportunity to better understand this growth.

### Foundational economy presence:

The evidence base suggests that there is a strong presence of businesses providing essential goods and services in this area. Further research will test how this contributes to the local economy.

### At-risk traditional occupiers:

Initial research revealed that this area hosts some traditional industrial occupiers, such as food manufacturers and caterer, for which similar types of space have been lost to new development. As Bridge Road LSIS is surrounded on all sides by major masterplans, this is a useful context in which to test interventions to protect traditional occupiers.

Protect

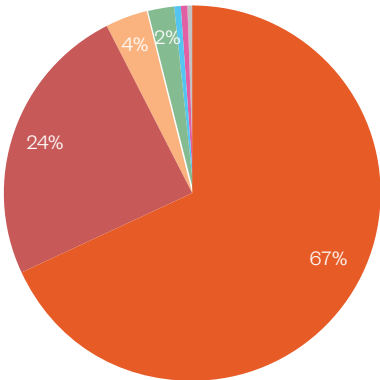




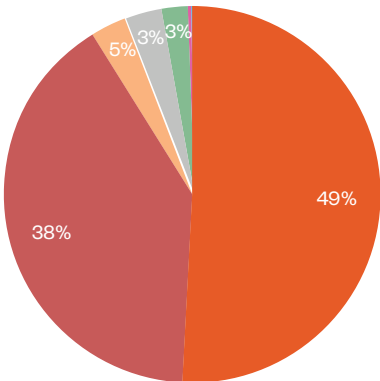
Bridge Road is the centre of a large industrial area encompassing both LSIS and non-designated industrial land. The western part of Bridge Road, formerly known as Middlesex Business Centre, has recently been converted into a large mixed-use development, with further development planned on remaining non-designated areas. The designated area is located to the east of Bridge Road.

Key figures

- 59 businesses
- around 500 jobs
- 42,000 sqm of employment floorspace



% of jobs by sector



% of floorspace by sector

Key

- Manufacturing
- Wholesale
- Warehousing
- Transport and logistics
- Construction-related
- Restaurants, cafés
- Vacant

03. Priority areas research

The Bridge Road LSIS contains predominantly wholesale businesses, which have emerged in the past decade.



- Key
- Manufacturing
  - Wholesale
  - Warehousing
  - Transport and logistics
  - Construction-related
  - Restaurants, cafés
  - Vacant
  - Study site



# 3.5 Bridge Road LSIS



## Employment

Bridge Road is a centre for wholesale and retail businesses specialised in phone accessories, house-ware and clothing. These small businesses are based in Charles House, Grand Union Enterprise Park and Southall Enterprise Centre. The activities on Bridge Road Industrial Estate and the Bridge Business Centre are more similar to other LSIS activities in Southall, primarily manufacturing. Bombay Halwa (part of the Noon group) is headquartered on site.

## Workspace

The area is composed of different industrial estates, including the Charles House building containing a shopping arcade with small units. Unlike other industrial sites in Southall, the area has a high number of visitors on a daily basis, at peak times comparable in footfall to the local high street.

The most common concern for local businesses relates to traffic congestion among Bridge Road, which is the only vehicular access to the area for workers, deliveries and visitors. This issue is reportedly aggravated by the lack of parking rules enforcement. Many businesses considered the local infrastructure inadequate, in terms of road or public transport access but also regarding the limited range of food options and toilet facilities in the area.

## Developments

The Bridge Road LSIS is currently surrounded by major redevelopments with a strong prevalence of residential use, some of which is located on formerly industrial land.

Name	Description
Land South of Park Avenue	Mixed-use development (522 homes, 1,131 sqm for E and F2 use)
Southall Sidings	Residential development (460 build-to-rent homes)
Malgavita Works	Mixed-use development (225 homes with commercial space)
Margarine Works	Mixed-use development (over 2,000 homes, 2,688 sqm of retail space, and 10,076 office and community space))
Quayside Quarter	Mixed-use development (1,997 new homes, 22,311 sqm for classes B1c and sui-generis use, 5,562 sqm of light industrial space, 2,275 sqm of flexible commercial units)
Havelock Estate	Mixed-use development (922 homes, 840 sqm of commercial floorspace)

Table 6. Developments in Bridge Road LSIS (see map on following page)

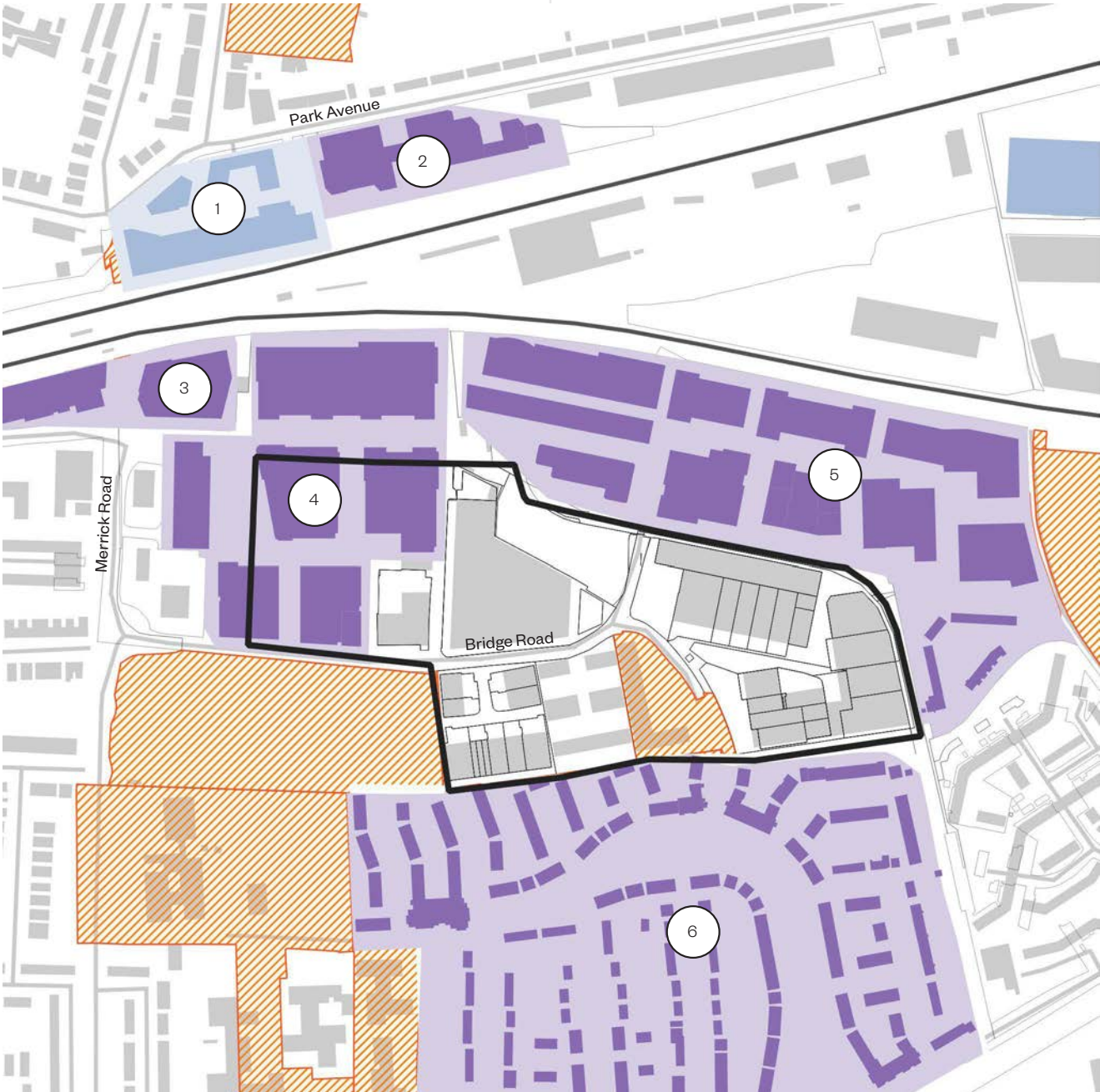


03. Priority areas research

The Bridge Road LSIS is surrounded by upcoming large-scale residential and mixed used developments.



- Key
- Pending consideration
  - Planning approved
  - Owned by London Borough of Ealing
  - Study site
1. Land South of Park Avenue
  2. Southall Sidings
  3. Malgavita Works
  4. Margarine Works
  5. Quayside Quarter
  6. Havelock Estate







Grand Union Enterprise Park



Phone accessories retailers in Southall Enterprise Centre



Bridge Road Industrial Estate



Electronics wholesalers



Charles House exterior



Charles House arcade

### 03. Priority areas research

Protect

The SWOT table below summarises the key findings from the research.

	Strengths	Weaknesses	Opportunities	Threats
<b>Workspace and economy</b>	<p>Diversity of workspace typologies enabling flexibility of uses</p> <p>Street-level visibility bringing vibrancy and commercial potential to the area</p>	<p>Presence of non-conforming uses with wholesale businesses operating as quasi-retail businesses, eroding more traditional uses such as caterers, launderers and food manufacturers</p> <p>Presence of unlawful activities</p> <p>Relatively poor quality employment and lack of diversity in terms of economic sectors</p>	<p>Relationship with town centre</p> <p>Improve access into the site with better streets, spaces and routes</p> <p>Integrate better with the wider neighbourhood and support more local footfall</p>	<p>Small businesses' vulnerability with evidence of low resilience and high turnover of wholesale businesses</p> <p>Erosion of industrial uses with</p>
<b>Area context</b>	<p>Central location and good connection to town centre and station</p> <p>Good link to adjoining residential neighbourhoods</p>	<p>Poor road access with Bridge Road being the only access.</p> <p>High volume of traffic and on-street parking</p> <p>Poor public realm and poor maintenance of shared space, including flytipping</p>	<p>Residential development will bring footfall to the local area. There is an opportunity to highlight the area's industrial character and identity as a productive place.</p>	<p>Land use conflicts and further erosion of leases</p> <p>Market pressure / residential development</p>

Table 7. Bridge Road LSIS SWOT table.

## Key message

Situated within an area of significant development pressure and accommodating uses both integral to the local economy and within sectors considered to be at-risk on London industrial land, Bridge Road provides an opportunity to test protection of industrial land not only from non-industrial uses (such as the residential pressure coming forward in and around the site) but also protecting at-risk sectors from other, higher value, industrial uses proliferating within small manufacturing spaces across the borough.

Bridge Road could continue to be a suitable location for the wholesale activities which have multiplied in the area over the past few years should this be considered appropriate within LSIS. Should the decision be made to support the retention and growth of these businesses, significant improvements to public realm and infrastructure and the public realm is needed. Traditional industrial activities such as food manufacturing and catering are not limited to large facilities in Southall but are occasionally accommodated in more dispersed forms within smaller premises. This observation indicates scope for a range of small to mid-sized premises to accommodate uses such as food manufacturing. More flexible and mixed typologies may also provide an opportunity to make manufacturing activities more visible and connected with the high street through active street frontages.

As LSIS, Bridge Road should be primarily considered for its capacity to host industrial uses, particularly context-sensitive uses such as food manufacturing, construction and catering. However, Bridge Road also has the capacity to support other mixed forms of intensification. Given the volume of residential being provided within the LSIS, this should be limited to employment uses and done through a masterplan-led process. As part of this, design guidance for the type of employment space needed within the new E class should be prioritised.

## Recommendations

The flexibility of units on Bridge Road LSIS has enabled the growth of new local sectors over the past several years, while at the same time threatening others on Grand Union Estate and Southall Enterprise Estate. In the context of large master plans which will bring investment, new uses and new residents to the LSIS, steps must be taken to ensure continued protection of the affordability and flexibility of stock.

### **Set clear direction on acceptable uses within LSIS and develop policy accordingly**

A surge in wholesale and retail activities in and around Bridge Road LSIS in the past ten years suggests the area has potential to become a wholesale hub for the local area, especially for phone accessories, tobacco products and homeware. At the same time, analysis of historic Google Earth imagery reveals that these activities have for largely replaced more traditional occupiers (i.e laundries and caterers) who are highly sensitive to location.

The redevelopment of the former Honeymonster site through the Quayside Quarter and Toplocks schemes have already contributed to the loss of industrial space serving the food manufacturing sector within Bridge Road LSIS. The planned delivery of 27,873 sqm. of workspace is spread across B1 and B2 uses, leading to a potential net loss of industrial space should predominantly B1 be delivered. Given this information and previously reported information about the nature of the wholesale and retail activities on Bridge Road, the council should consider whether these are acceptable activities within LSIS and develop Local Plan policy accordingly.

### **Go beyond setting policy to broker relationships between developers and potential employment space operators**

Policy will not be enough to manage the scale of workspace pursued. Through the pre-app process, the Council should seek to actively broker relationships between developers and potential employment space operators. This may create more control over the kinds of employment spaces and services to be delivered within new developments.



#### Redesignate Charles House as LSIS

Given the continued functioning and active market within currently non-designated industrial areas around Bridge Road, the Council should consider opportunities in the local planning process to re-designate industrial land which continues to host active market but is threatened by development pressure. This could include the Charles House site, which currently sees consolidated land ownership and current wholesale and retail uses.

#### Create additional employment capacity ahead of site redevelopment to minimise disruption

Critically for the LSIS, the creation of additional employment capacity prior to any further (major) redevelopment of sites is needed to ensure businesses are not displaced by redevelopment, or required to move twice in short succession, which would place businesses at significant risk. This may require a shared upfront investment to unlock an existing site and support businesses to locate to it to then allow a phased process of development.

## Key considerations for future sectors and employment space typologies

Given the substantial development changes the area is undergoing, it is envisaged that the area can accommodate predominantly medium density but small scale manufacturing uses with some lower density employment uses retained for wholesale warehousing. There is an opportunity for the Council to provide guidance on the form of future typologies to achieve an innovative mix of different employment space categories such as B1c stack above B8. It would be especially useful to explore proposals that deliver active street frontages and contribute positively to the public realm in order to make the area an attractive place to visit.

#### Sectors of focus

There is an opportunity to both protect activities on this site which are considered to be at-risk on London industrial land and provide space for other sectors such as creative manufacturing that may concentrate higher-quality and more resilient employment.

- Catering: The area has historically hosted several catering businesses. These operations tend to occur within light industrial premises and are minimally disruptive but do tend to have requirements around servicing and delivery. Catering tends to be particularly sensitive to location due to specific supply and distribution networks.
- Food manufacturing: Bridge Road LSIS has seen the major loss of the Honeymonster factory and other food manufacturing uses through the Margarine Works development. Bombay Halwa remains a key node in Southall's food production ecosystem and as the last remaining large employer on the LSIS should be protected.
- Creative design and manufacturing: While there is little existing creative manufacturing use on the LSIS, this is a use compatible with both residential development and other industrial uses. If designed and executed to be visible, these activities can help bring local identity and therefore value to new development.
- Wholesale/retail: Wholesalers/quasi-retailers currently occupy a number of converted warehouses throughout the LSIS. Given the large

### 03. Priority areas research

- volume of traffic and footfall that comes to the area, there is an opportunity to consolidate these uses on a flexible ground floor (accessible for servicing/delivery) with other employment uses stacked above.

#### Employment space typology

Given the typological diversity across the area, it is recognised that the eastern side of the site has capacity for smaller-scale employment units compatible with residential (light industrial and studio type spaces, shared and workshop spaces) whereas towards the centre and western side of the site, larger-scale medium and low-density floor plates could be sought and heavier uses should be promoted.

#### Lessons learned for other 'protect' areas

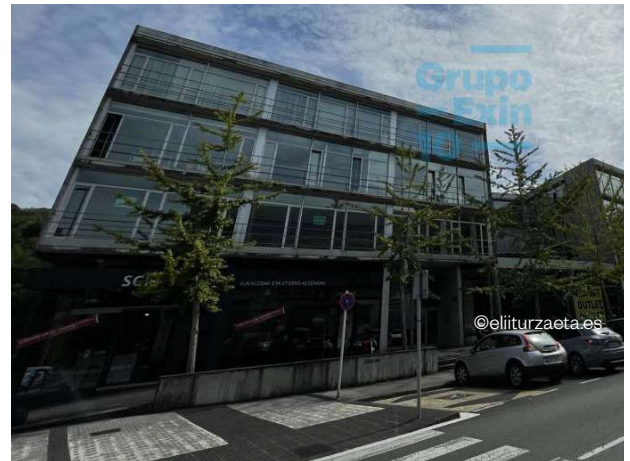
- Masterplan approach needed to support delivery of spaces within LSIS in line with requirements of at-risk sectors at an intensity or alongside other employment uses that contribute to commercial viability.
- Go beyond setting policy to broker deals between developers and operators of the kinds of spaces needed to accommodate at-risk sectors
- Re-designate well-functioning industrial land in nearby locations so that employment uses can be retained
- Ensure the creation of additional employment capacity prior to any site redevelopment to avoid displacement

Protect

## Precedents

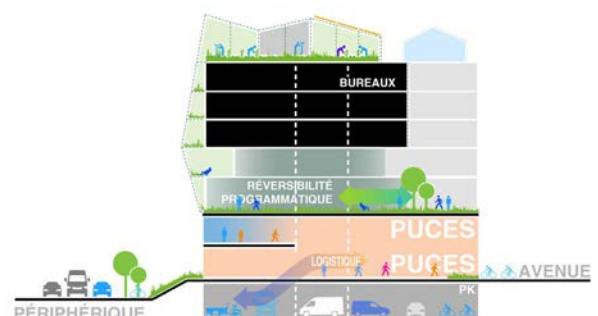
### Hybrid intensification (Beiza Building, Donostia-San Sebastián)

Mixed use development including active retail frontages facing the main street with shops, showrooms, and food offers; 3 floors of offices and flexible workspaces above; light industrial uses accessible from the courtyard at the rear and a ramp providing access to small light industrial units at the second floor of the building.



### Logistics, retail and manufacturing (Porte de Montreuil flea market, Paris)

The proposed renovation of the flea market in Porte de Montreuil proposes to host the market at street level in a large and airy public space, with a logistics platform below it linked to the city's ring road. On the upper floors, flexible space may host offices or workshops, with a greenhouse on top of the building.



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## 04.

# Recommendations

- **The case for intervention**
- **Policy options**
- **Delivery mechanisms and tools**

# 4.1 The case for intervention

This research, together with the Inclusive Economy Baseline, outlines the complex global, national and local factors shaping Ealing's economy and its industrial land assets. The evidence suggests that the public sector should play an important role to address key market failures which are currently resulting in many of Ealing's residents, businesses and sectors being actively disadvantaged by the macro-economic forces driving demand for industrial space.

Overall, given the scale of ongoing regeneration programmes, infrastructure investment and the nature of the market and demand, there is a significant risk that commercial floorspace provision going forward will fail to deliver the range of space that can support the diversity of Ealing's economy and also that its price point may exclude many businesses from remaining or indeed moving to the area. However, by setting out the right planning framework and through active intervention in the workspace sector, there is evidence to suggest that public sector can drive positive outcomes. This includes several points.

Retaining and growing existing businesses as well as supporting SMEs: Many of the existing businesses provide important jobs for local people and form part of wider supply chains. By providing or securing the re-provision of suitable workspace for existing businesses, the Council can maintain the strong economic and/or rationale for their current location and allow its business base to scale up. In addition, SMEs tend to struggle more in finding suitable workspace, and therefore intervention would support start ups, early growth and smaller businesses.

Providing for affordability: Workspace affordability is inextricable from small businesses workspace

provision and should be understood beyond the cost of rent : scale of space, levels of fit out, lease flexibility and service charges costs etc. are all components of affordability.

Support key sectors, including manufacturing and traditional industrial uses: Particular sectors warrant greater support given their wider impact in terms of local economic identity, employment or supply chain. In particular, production sectors (e.g. food, specialist fabricators, manufacturing) are often priced out of changing locations, despite having strong links locally and providing skilled jobs for the population.

Manage loss of naturally occurring 'affordable' workspace: Housing pressures and the demand for logistic spaces disproportionately impacts low value spaces, particularly in areas of high residential value change. It is therefore important for the Council to intervene in locations where planning does offer a lever (e.g. designated industrial land, and in particular LSIS) to preserve and even enhance the stock of appropriate space.

Manage speculation and create certainty of outcome: By including an effective workspace policy, the Local Plan and associated planning guidance can help to direct developers to suitable solutions and also manage over-valuation of land. In addition to this, a good workspace planning policy can help with planning negotiations. Overall, mechanisms of securing affordable workspace such as through s.106 agreements are dependent on a buoyant development market, scheme cost considerations and affordable workspace not being negotiated away in favour of higher political priorities such as affordable housing or public realm. A clear, common, policy approach can help overcome these issues and create a clear pipeline of space for businesses.



# 4.2 Policy recommendations

The evidence has made it clear that urgent and decisive public sector intervention in shaping, supporting and delivering employment space on Ealing's industrial land will be essential to meeting Ealing's ambitions for inclusive growth. As has been established, intervention will include setting the right planning framework in addition to directing delivery and managing future development.

However, in order to realise Ealing's inclusive growth ambitions, steps will need to be taken which go beyond setting the right planning framework into more direct action to drive innovation. Public sector innovation outside of planning should focus on areas where innovative policy or public sector interventions are most likely to have a positive impact or where there are explicit market failures. In this sense, the typology framework established and tested in this study provides a useful tool in determining first steps to be taken in establishing interventions on industrial land.

### Overarching approach

The intensification of existing sites and premises to deliver more capacity should be an established part of any employment policy in the new Local Plan.

The forecast for future growth in the borough as established by the West London Employment Land Review (2019, and update 2021) suggests that there will be an overall small reduction in the future supply of industrial space. However, this masks a more nuanced pattern of need in sectoral terms. Whilst heavier sectors are forecast to continue to decline, evidence from the on-the-ground research and consultation suggest that a range of activities will require some light industrial space in the future. Such activities range from everyday local services through to higher value creative businesses and would for example include printers, product development, fabrication, food manufacturing and construction related activities. Much of this activity already occurs within the borough.

To accommodate both the demand for logistic/ distribution and provide the space needed for existing and future businesses to retain, grow and locate in Ealing, a greater share of development capacity will be needed in the borough overall. Given the finite land resources available the developments planned will need to deliver fit for purpose working environments that are innovative in the way that they deliver standalone employment uses, intensification and co-location approaches.

While intensification is needed, there is also a risk that a one-sided focus on higher density employment space would orientate the economy towards a different activity mix than what this study suggests the market may want to deliver. It is therefore important that the balance between high, medium and lower density employment spaces is realised in emerging and future planning applications. This will require proactive intervention by the Council as it will rely on delivering more ambitious building typologies that have a higher proportion of non-residential space and that also co-locate uses in new ways. This may affect development viability and therefore impact future S106 and other developer contribution negotiations.

Delivering the right mix will be an evolution over time to ensure that the 'right' spaces are provided at the point they are needed in locations that can provide the right conditions for their operation. Spatially, the provision will need to work with the grain of the borough's different geographies and the scale of infrastructure provided; suggesting that the SILs offer the greatest potential to deliver the larger space requirements businesses will have in the area.

## 04. Recommendations

### Approach to SILs

The London Plan sets the clear objective to protect and intensify SIL functions to ensure that the boroughs can meet current and future demands for industrial and related functions. SIL is described by the new London Plan as London's main reservoirs of industrial capacity which is critical for the efficient functioning of the city's economy. The London Plan is clear that SIL should provide space for industry, logistics and services to support London's economy (see Policy E4). The Plan also states that developments which fall within these proposed uses should be supported by the local planning authority.

The Plan suggests that the role of the planning authority is primarily to provide the supporting infrastructure to enhance the competitiveness and attractiveness of the borough's SIL.

Overall, Ealing local policies should seek to protect and intensify the function of SILs. However, Ealing has limited options to stimulate the market to accommodate mixed intensification or set preferences for specific types of uses (other than ensuring SIL is protected and functions efficiently). Therefore, the council needs to consider the wider levers available to maximise socioeconomic value of designated SIL:

- It is vital that any future development or change within SILs protects and enhances the functionality of this important economic hub. In line with London-wide policy and guidance any change should take a 'business first' approach, replacing and where possible enhancing the supply of floorspace in the area to help meet the identified need for more employment floorspace.
- Following from this and in line with the London Plan, SIL should be protected for industrial activity including related sui generis uses, waste management and transport facilities and situations where uses are ancillary in scale and function. Any ancillary uses should not be permitted to compromise the ability of businesses to carry out activities around the clock.
- It is assumed that some degree of intensification on SIL will largely happen naturally as a function of market forces. As long as demand remains high, as stock becomes outdated, landowners and developers will likely see the value of increasing their revenue by redeveloping their assets and delivering increased floorspace however possible. In this process development proposals which support, protect and enhance the role and function of SIL while maximising the provision of employment floorspace should be supported. Overall, the Local plan should emphasise London plans focus on intensification of SIL but focus on catering to high value and low employment density uses such as logistics.
- Recognising both the limited role the Council is allowed in setting the planning direction for SIL combined with the assumption that while the market may deliver intensified floorspace in SIL where possible, it will likely fail to deliver employment uses that maximise socioeconomic benefit for Ealing residents (low density, low value, or low resilience), the Council should seek to primarily influence the development of SIL through direct engagement in the industrial market or partnerships with key landowners.
- Where determined to be appropriate, the Council could seek to develop Masterplans in partnership and prioritise a more formalised strategic relationship with Segro. This approach has been taken elsewhere (Slough Trading Estate, Segro park in Dagenham) and would help to make Ealing a leader in the delivery of industrial space.
- The redesignation of some small SIL into LSIS could be considered to allow the Council to better intervene on sites currently accommodating low density employment, non-conforming uses and where the market is unlikely to deliver appropriate uses. This should be considered carefully. Initial focus should be in areas where joint masterplanning has already been conducted and site intensity. The two sites to be considered are the SIL site adjacent to Hanger Lane (western part of the site is currently occupied by large retail occupiers) and the detached part of the Great Western SIL (western triangle part of the SIL encapsulated in between the railway and Uxbridge Road, currently home to non-conforming uses and relatively low quality industrial buildings).

## 04. Recommendations

### Approach to LSIS

Whilst the planning powers related to SIL are limited by the London Plan, there is more flexibility for Ealing to prioritise the types of uses that best meet local need on LSIS. Within the Local Plan, boroughs are required to designate and define boundaries and policies, justified with evidence from a Employment Land Review. Boroughs also have the power to advise on the range of uses that are acceptable on LSIS, giving authorities a key role in curating the growth potential of these areas through the Local Plan.

Ealing's LSIS is concentrated in the south of the borough; primarily in Acton and Southall. Due to their economic diversity and typically strong viability, LSIS are best suited for intensified and mixed forms of development (including co-location). Therefore, if planned effectively, LSIS will be critical to providing more higher paying jobs and could provide the spatial focus for the council's wider regeneration ambitions.

- The London Plan grants Councils significant control over the shape and function of LSIS within local planning policy. Given this, and considering the need to deliver a large volume of intensified floorspace in a way that is also viable, intensification should be encouraged on LSIS and in line with London Plan policy E7. This will be best achieved pro- actively through a masterplan-led approach. Given the intensity of development pressures in Acton, it is recommended to begin this with South Acton and the Vale.
- While a broader range of uses, including non-industrial office may be permitted on LSIS, the Council should retain a focus on employment space in stipulating new delivery. The council should actively focus on the delivery of new spaces which maximise higher employment density and better paid uses.
- Integral to this will be adequate control over the design and delivery of the new 'E' class. Design guidance should specify how new Class E premises genuinely meet the needs of light industrial activities and other compatible industrial

uses. The Council would need to maintain an up to date understanding of needs of businesses in the area, to be certain of what is being requested from developers

### Approach to non-designated industrial land

A number of small industrial sites are currently non-designated, where it is not officially protected for industrial use by London-level policy. Non-designated industrial land has seen the greatest loss of stock in the past 20 years, with greatest loss across B2 and B8. These sites provide opportunities to experiment with mixed-use intensification and overall should continue to provide employment and industrial uses.

- Smaller non-designated sites should be considered as opportunities to promote new/ replacement supply of small 'industrious' spaces for production based activity and associated professional services, with opportunities for mixed use intensification with residential development. The latter should only be supported where there is no reasonable prospect of the site being used for industrial and related purposes or if the site has been allocated for residential or mixed-use development in the Local Plan in accordance with London Plan policy E7c/d.
- Explore opportunities to create and protect valuable non-designated industrial land, including the Balfour Business Centre site and Charles House sites in Southall. This should also include identifying opportunities to include employment and industrial employment space in site allocations.

### 4.3 Typology considerations

In addition to blanket approaches within policy, the delivery of a genuinely ‘industrious’ mix of employment floorspace on Ealing’s industrial land will depend largely on the targeted interventions the Council can make to deliver innovation in terms of building typology and configuration. The development and testing of a typology framework provides a starting point from which the Council can begin to consider the kinds of interventions appropriate for industrial land according to differing compositions and economic function.

The following sections will revisit the typologies explored and will outline what next steps the Council should consider in intervening in each typology. It is important to remember that the application of typologies is a data-led exercise and should not be taken as the recommendations to be applied in each area, but should serve as a tool to determine an overall direction/approach. Specific considerations are explored per typology on the following pages.

#### Re-imagine

Areas which are part of the ‘re-imagine’ typology typically contain or are located within areas hosting low productive economic activity. The employment within this typology tends to be underdelivering in terms of social or economic benefits to Ealing—average employment densities are low, jobs are low paying and businesses/sectors may either struggle from dubious resilience or erode industrial character. The typology mapping reveals that these areas tended to concentrate along the A40 and in SILs, where employment density is especially low. On non-designated land, vehicle repair centres and land for utilities tends to fall within this typology (although utilities functions have been discounted from consideration for this study).

For re-imagine typologies, the aim of intervention should be to create the conditions for the market to lead in delivering space which rebalances sector composition so that higher density and higher quality jobs are provided and the employment composition better matches Ealing’s ambitions for inclusive economic growth.

#### What’s next for the re-imagine sites? The following considerations should be made:

- Where is there consolidated land ownership? This is where strategic partnerships should be formalised to work towards shared visions and strategies.
- Where does the Council own assets? These might be transformed or redeveloped as exemplars for workspace development and market confidence.
- Where is there currently vacant land or space? Depending on the location, size and nature of vacancy there may be an opportunity for the Council to either invest or develop site-specific development briefs.
- What is the market willing to deliver and how can this be best aligned with ambitions?



## 04. Recommendations

### Intensify

Areas which are part of the 'intensify' typology contain businesses or sectors which are key economic drivers for the borough and have the capacity to grow to support more inclusive employment opportunities in line with inclusive economic growth ambitions. In intensify areas, light manufacturing tends to predominate, average neighbourhood plot area ratios are below 65%, existing employment density is low and links to road and rail are adequate to support intensified employment, supply and delivery. Intensify typologies concentrate in Acton, where some of the borough's highest value employment is hosted and where the arrival of Crossrail brings potential opportunities.

For 'intensify' typologies, intervention should be geared towards creating workspace which accommodates a higher density of the activities. This may include but is not limited to identifying opportunities for the integration of more dense sectors, finding opportunities to deliver stacked employment space or (in LSIS and non-designated land) to co-locate housing with industrial uses.

#### **What's next for the intensify sites ? The following considerations should be made:**

- Could residential co-location work on the site to help deliver space in line with employment objectives?
- What is the definition of affordable workspace for businesses in the area and/or for the sector looking to be grown? This will help determine which kinds of premises need to be 'subsidized' by other development.
- Where does the Council own assets? These might be transformed or redeveloped as exemplars for workspace development and market confidence.
- Is the site LSIS? If so, a masterplan approach should be pursued.

### Create

Areas which are part of the 'create' typology are situated within geographies of high economic need, but also have specific opportunities to deliver new workspace. Create areas tend to locate where prime rents are achievable, which suggests that new workspace could be viable, and have a tendency towards large consolidated pieces of land. There is a notable presence of creative industries such as artists studios and film studios due to their compatibility with intensified or co-located uses.

For the 'Create' typologies, the focus should be on identifying opportunities for strong Council steer in the design and operation of new employment space. This may initially take the form of individual flagship projects which provide developer and landowners with reassurance that new ideas can work.

#### **What's next for the create sites? The following considerations should be made:**

- Where does the Council own assets? These might be transformed or redeveloped as exemplars for workspace development and market confidence.
- How can the Council set the tone and show exactly what needs to be achieved? This may include site-specific development briefs directing specification, target occupiers, etc.
- Are there any opportunities for the Council to purchase assets? These could be exemplars for workspace development and market confidence.

## 04. Recommendations

### Protect

Areas which are part of the 'protect' typology contain socially or strategically important activities that must be protected, even if the area overall is less economically significant. Protect areas dominate in Southall, where there is strong presence of at-risk industrial activities.

Protect considerations can be made even where other typologies are identified. For 'protect' typology, the focus should be on creating the conditions for and/or directly providing space for the protection of specific sectors.

#### **What's next for the create sites? The following considerations should be made:**

- What are the spatial requirements of at-risk sectors? This includes size of premises, optimal configurations, relationship with street networks, heating/air requirements etc.
- What are the operational requirements of at-risk sectors? This includes hours of operation, management of the space, etc.
- What is the definition of affordable workspace for businesses in the area and/or for the sector looking to be grown? This will help determine which kinds of premises need to be 'subsidized' by other development.
- Is there capacity to create additional employment space prior to redevelopment to avoid displacement? This may include nearby land which could be re-designated or opportunities to consolidate activities in a new location.

# 4.4 Delivery considerations

The Council will be a critical player in unlocking the economic potential of the borough's industrial land, however its role may need to extend beyond simply setting the planning framework for future growth to engage in direct delivery or management of development to ensure it meets future needs.

### Role of policy and guidance

- The Council can set out a positive proposition for the borough's SILs and LSIS. In particular, LSIS should be equipped with area-wide guidance on space typologies and design as part of the Masterplanning process.
- Across all industrial land, masterplans and site specific development studies (potentially developed into site specific development briefs) for key opportunity sites can provide further detail on operational requirements and provide a basis for good planning negotiations. This can help to provide certainty to landowners, from what is expected from (re)development and efficiently support the delivery of functional employment space. This would also help to manage land value expectations. Key sites have already been identified in Perivale SIL, South Acton LSIS, The Vale LSIS or Bridge Road LSIS.
- Businesses will need more than functioning space to be successful in Ealing's industrial areas, the spaces between buildings and that connect developments will need equal amounts of care and attention. In areas that will incorporate some elements of co-location, the creation of a detailed public realm framework or vision that balances the needs of businesses, in particular servicing needs, with wider requirements of residents could be critical in ensuring the areas are 'business ready' without compromising on the quality or standards of the urban realm. This will be critical to ensure a proper business environment is created, especially in areas with disparate land ownership.

### Involvement in delivery

The Council should focus its workspace provision on elements that will broaden the offer, provide proof of concept, allow businesses to remain, and which would not otherwise be brought forward by the market at this point in time. It should be a market maker to address market failures and in this way should consider active intervention (starting with council owned assets/sites) in industrial land market.. Innovative approaches to could include:

- Stacked industrial space (intensification schemes) that integrate yard spaces for industrial servicing and provide for manufacturing/production uses ;
- Developments that offer, in separate spaces, both residential accommodation and genuinely industrial-led employment space and which promote affordability ;
- Integration of space for innovative / green sectors and/or for social enterprises.

The Council can also initiate new approaches to investing in a wide range of employment space alongside the private sector, leveraging in GLA funding or social investment in order to improve viability of employment space fit-out and management, and thus achieving overall affordability.

These recommendations should be read jointly with recommendations from the Ealing Affordable Workspace Study (2022).

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