Industrial Capacity

London Plan (Consolidated with Alterations since 2004)
Supplementary Planning Guidance

March 2008

MAYOR OF LONDON

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Mayor's Foreword

Like any city, the health of London's economy requires an adequate supply of land to meet its industrial needs.

Although traditional manufacturing activities play a smaller role in London's economy, industrial land provides vital capacity to accommodate new industries - such as waste management, recycling, logistics and land for transport activities, which are essential to London's wider success and sustainability.

My London Plan sets out policies aimed at providing sufficient capacity for industrial and other related uses, whilst planning and managing the transfer of surplus industrial land to other uses. To meet these varied requirements I continue to promote the Strategic Industrial Locations as London's main reservoir of industrial capacity and encourage boroughs to develop local policies to manage locally significant and other smaller industrial sites in line with the London Plan and this guidance.

I want to see boroughs and other partners working closely with the GLA Group to plan, monitor and manage the release of surplus industrial land so that it can better contribute to accommodating and supporting London's growth. This includes making sites available for additional housing, including affordable housing, and – in appropriate locations - providing social infrastructure and contributing towards the renewal of London's town centres. By managing and improving London's industrial land, and by responsibly releasing surplus land, we will make a major contribution to renewal in many of London's most needy areas. This is especially true in the Thames Gateway, where there is particular scope for rigorous management of both occupied and vacant industrial land, as well as great scope for new housing and transformational regeneration.

I look forward to working with our partners across London to make the most effective and sustainable use of this precious resource.

Mayor of London

Summary

i This Supplementary Planning Guidance (SPG) provides guidance on the implementation of policies relating to industrial capacity in the Mayor's London Plan[1] (Consolidated with Alterations since 2004) published in February 2008 (hereafter referred to as the 'London Plan'). It is focussed on the implementation of London Plan Policies 2A.10 and 3B.4 but also addresses the plan's broader concerns including those to secure efficient and effective use of land, environmental improvement and wider sustainability objectives, especially those to tackle climate change. To assist with the interpretation of the SPG, an explanatory diagram is provided in Annex 1.

ii The SPG provides guidance to:

- ensure an adequate stock of industrial capacity to meet the future needs and functional requirements of different types of industrial and related uses in different parts of London, including that for good quality and affordable space;
- plan, monitor and manage the release of surplus industrial land so that it can better contribute to strategic and local planning objectives, especially those to provide more housing (including affordable housing) and, in appropriate locations, to provide social infrastructure and to contribute to town centre renewal.

iii Structural change in the London economy over recent decades has led to a shift in employment away from traditional manufacturing industries and into the service sector. Over the past three decades, London's employment in manufacturing has declined from over 1 million in 1971 to just 254,000 in 2004 and accounts now for only 6% of London's total employment.

iv However, over the plan period for the London Plan (2006-2026) there will be increasing demand for industrial land from a range of other important industrial type functions. These include an efficient and sustainable land supply for logistics, waste management, recycling, transport functions, utilities, wholesale markets and some creative industries. In the highly competitive London land market, making provision for these requires positive planning to achieve outcomes that can meet the economic objectives as outlined in the London Plan and the Mayor's Economic Development Strategy in a sustainable manner.

v London Plan Policies 2A.10 and 3B.4 set out a plan-led approach to promoting and managing industrial capacity through three types of location:

- Strategic Industrial Locations (SILs) – a resource that must be sustained as London's main reservoir of industrial capacity but nevertheless must itself be subject to periodic review to reconcile demand and supply.
- Locally Significant Industrial Sites (LSIS) - protection of which needs to be justified in assessments of supply and demand for industrial land and identified in Development Plan Documents (DPD); and
- Other smaller industrial sites that historically have been particularly susceptible to change. In some circumstances these sites can better meet the London Plan's objectives in new uses, but which in others will have a continuing local and strategic role for industry. This sub-category will continue to be the area of greatest change.

vi In 2006, London had an estimated 5,500 hectares of industrial land, a reduction of 440 hectares since 2001. Approximately 40 per cent of this land lies within allocated SILs. More than two-thirds of land in SILs is comprised of Preferred Industrial Locations (PILs) to meet the needs of industries, which to be competitive, do not place a high premium on an attractive environment, though they may require infrastructure and other qualitative improvements. The remaining third of land in SILs is comprised of Industrial Business Parks offering a higher quality environment.

vii In planning for industrial land, boroughs are urged to provide for sufficient land and premises in industrial and related uses, including waste management and logistics to meet future demand in London in good quality, flexible and affordable space. Having regard to the net reduction in land demand and the careful management of vacancy rates, the London Plan indicates that there is scope to release 41 hectares per annum between 2006-2026. There is scope for a higher rate of release (48 hectares per annum) during the early period 2006-2016 as a result of declining demand for industrial land and rigorous management of vacancy rates. In the later period 2016-2026 the overall scope for release falls to 33 hectares per annum.

viii There are wide geographical variations in the demand and supply balance across London, its sub-regions (as identified in the London Plan) and within boroughs. Due to constraints on the quality, availability and nature of the current supply, there may be local shortfalls in quality modern floorspace and readily available development land, particularly in parts of West and South West London. Supply is less constrained in the North East and South East sub-regions. The distribution of release must take full account of other land use priorities and be managed carefully to ensure that a balance is struck between retaining sufficient industrial land in appropriate locations and releasing land to other uses. This SPG provides

geographically sensitive guidance to be refined by boroughs to manage the release of sites both within and outside SILs in the light of local and strategic assessments of demand and supply.

ix The spatial expression of this guidance indicates that:

- release of industrial land should generally be focussed on smaller sites outside of the SIL framework;
- industrial land in Strategic Industrial Locations and Locally Significant Industrial Sites (where justified) should in general be protected, subject to guidance elsewhere in this SPG and except in parts of North East and South East London where there is scope for strategically coordinated further release from some SILs;
- there is need for partnership working to see that adequate provision in inner London is sustained, and where necessary enhanced, to meet the distinct demands of the Central Activities Zone for locally accessible, industrial type activities.

x Integrated action by the LDA, TfL, boroughs and other relevant agencies in the sub-regions is essential to bring forward the most attractive sites at a time when the planning process must also manage selective release of strategically surplus capacity to other uses. Where consolidation of industrial land affects SILs, the GLA group will coordinate this process through the Sub-Regional Implementation Frameworks and incorporate the outcomes into future reviews of the London Plan. The Mayor will continue to work with boroughs and other partners to develop more detailed frameworks to manage the appropriate release of land in SILs to inform detailed revisions in DPDs.

xi Land released as a result of such consolidation exercises must be re-used to meet strategic as well as local priorities. Housing (including affordable housing) and appropriate mixed development will be the key priority. Industrial land release can also provide capacity for social infrastructure such as education, health, emergency services, prisons, places of worship and other community facilities. Increasing capacity for town centre related development is also an important consideration in some locations.

xii In line with transport policy set out in the London Plan, Mayor's Transport Strategy and the London Freight Plan[2], this SPG encourages movement of goods by rail or water, including the use of inter-modal facilities and supports the sustainable movement of waste, and products arising from resource recovery, and the use of modes other than road transport when practicable.

xiii Mixed uses and intensification can present urban design challenges. Redevelopment for higher density, mixed uses through the consolidation of a SIL or LSIS must not compromise their offer as the main strategic and local reservoirs of industrial capacity and as competitive locations for logistics, transport, utilities or waste management. Where land is released for housing or mixed-use development it must fulfil design criteria for sustainable buildings and secure a complementary mix of activities.

xiv The quality and fitness for purpose of industrial sites is an important concern of the London Plan and this SPG. Qualitative improvements in industrial locations can also contribute towards the wider objectives of the London Plan to make London an exemplary city in terms of mitigating and adapting to climate change and urban design, public realm and architecture. The effective management of industrial capacity can also play a key role in promoting social inclusion, access to employment and regeneration. Improving the quality of industrial sites including provision for Small and Medium-sized Enterprises (SMEs), will require coordinated planning, regeneration and transport actions, with cooperation between boroughs, the GLA group and other partners.

1 Introduction

Purpose of the SPG

1.1 This SPG provides guidance on the implementation of policies relating to industrial capacity in the London Plan (Consolidated with Alterations since 2004) published in February 2008 and referred to hereafter as the 'London Plan')[3]. It focuses on the implementation of London Plan Policies 2A.10 and 3B.4 to manage, promote and, where appropriate, protect Strategic Industrial Locations (SILs) as London's strategic reservoir of industrial development capacity to accommodate industry and other activities with similar land use needs (including logistics, waste management, utilities and transport functions). It also provides guidance on the implementation of strategic policy to manage the protection, release or enhancement of industrial sites outside the SILs including Locally Significant Industrial Sites (LSIS) and other smaller industrial sites not categorised as SIL or LSIS. To assist with the interpretation of the SPG, an explanatory diagram is provided in Annex 1.

1.2 The approach to the management of industrial capacity set out in this SPG is designed to address the plan's broader concerns including those to secure efficient and effective use of land and environmental improvement and wider sustainability objectives, especially those to tackle climate change. In particular the SPG provides guidance to:

(i) ensure an adequate stock of industrial capacity to meet the future needs and functional requirements of different types of industrial and related uses in different parts of London, including that for good quality and affordable space; and

(ii) plan, monitor and manage the release of surplus industrial land so that it can better contribute to meeting strategic and local planning objectives, especially those to provide more housing (including affordable housing) and, in appropriate locations, to provide social infrastructure and to contribute to town centre renewal.

1.3 As SPG, this document does not set new policy, but rather explains how policies in the London Plan should be carried through into action. It will assist boroughs when preparing Development Plan Documents (DPDs) and will also be a material planning consideration when determining planning applications. It will also be of interest to landowners, developers, planning professionals and others concerned with the use and enhancement of land and premises in industrial and other related uses.

How the SPG is structured

1.4 The background and policy context for the SPG is set out in section 2. The plan, monitor and manage approach to industrial capacity is set out in Section 3 which is intended to reconcile the relationship between demand and supply of industrial land over the period 2006-2026. It provides a geographical framework for the boroughs, LDA and other partners to identify and promote the supply of sites of appropriate quality needed by different occupiers, as well as guiding the release of surplus land for other uses through realistic and balanced land-use policies.

1.5 Section 4 sets out the Strategic Industrial Locations Framework and highlights the importance of Locally Significant Industrial Sites and other smaller industrial sites. Sections 5 to 7 of the SPG provide guidance on a range of industrial related land uses and activities that play a major role in the efficient functioning of the London-wide, sub-regional and local economies and how these contribute to wider sustainability objectives. These uses include logistics (Section 5), waste management and recycling (Section 6) and transport, utilities and wholesale markets (Section 7).

1.6 Section 8 applies national and London-wide urban renaissance principles to encourage more sustainable use of industrial land by fostering intensification through higher densities and, where appropriate, a wider mix of uses where these are mutually compatible and can produce a good quality environment and sustain or enhance provision for business.

1.7 Section 9 provides guidance on enhancing the quality of London's industrial capacity including the contribution that it can make to mitigating and adapting to climate change. This section also sets out how the management of industrial capacity can contribute towards social inclusion and regeneration. Section 10 provides advice on promoting a range of provision and responding to the needs of small and medium-sized industrial enterprises.

Definitions used in this SPG

1.8 Industrial Capacity is a general term referring to land, premises and other infrastructure (whether occupied or vacant) in industrial and related uses. For the purposes of this SPG, the expressions of 'industry and related uses' and 'industrial land' are broken down into the following categories:

(i) Light industry
(ii) General industry
(iii) Logistics, warehousing and storage
(iv) Waste management and recycling
(v) Utilities
(vi) Land for public transport functions
(vii) Wholesale markets
(viii) Some creative industries
(ix) Other industrial related uses not in categories (i) to (viii) above.

1.9 In broad terms, light industry and general industry comprise the types of activities defined in the Use Classes Order[4] as B1(b)/(c) and B2 respectively. Logistics, warehousing and storage typically include those uses defined under Use Class B8. Together, the categories (i) to (iii) above, plus vacant industrial land comprise the 'core' definition for estimates of the supply of industrial land. However these Use Classes do not necessarily include all the potential users of industrial land including waste management, utilities, land for transport functions, wholesale markets and other industrial related uses, some of which, depending on the specific use, may be sui generis uses.

1.10 Conversely, some of these Use Classes can accommodate what are essentially office based rather than production activities. Definitions of industrial land are further complicated as traditional distinctions between production, assembly, distribution and office-based activities in the manufacturing sector are breaking down. Flexibility in the Use Classes and General Permitted Development Orders has in some areas led to changes from low value industrial to high value office uses. In London, the SIL framework seeks to manage this balance and accommodate industries of different types (outlined in Section 4), recognizing that they will have different spatial and environmental requirements.

1.11 Recent research studies[5] on the demand for industrial land and the use of business space have investigated the relationship between industrial employment as defined in the Standard Industrial Classification (SIC) and industrial land use. These studies note that some SIC manufacturing and wholesale distribution categories uses exclude activities that occupy industrial land and conversely, include others which are highly unlikely to

occupy such land, for example publishing and large manufacturing firms in central London. The latter are classified by the SIC as manufacturing but are most likely to be headquarters offices. The consensus among these research studies suggests that a refined method of selecting specific SICs for analysis is the most reliable approach when considering the demand for industrial land. Except where stated, this SPG adopts the 'wider' definition of industrial land comprising the categories (i) to (ix) in paragraph 1.8. The SICs used in assessing industrial employment are set out in recent research for the GLA[6].

2 Background and Policy Context

Industry trends and emerging users of industrial land

2.1 Structural change in the London economy over recent decades has led to a shift in employment away from traditional manufacturing industries into the service sector. Over the past three decades, London's employment in manufacturing has declined from over 1 million in 1971[7] to just 254,000 in 2004[8] and accounts now for only 6% of London's total employment.

2.2 The reasons for the historic decline in manufacturing employment reflect structural change and macro economic factors exacerbated in London by higher costs and competition for land from other users. However, the process of change also entailed some restructuring among the industries that still find London a competitive location. This is partly because of accessibility to a regional market that is uniquely large, wealthy and compact. It also reflects innovation, changing techniques and specialisation as industries move towards the production of higher value goods or become more closely associated with services such as those with an emphasis on research, catering or the leisure market. The decline in manufacturing employment is anticipated to continue over the period 2006-2026 but at a reduced rate of just over 6,000 jobs per annum[9].

2.3 Over the plan period 2006-2026 there will be increasing demand from a range of other important functional users of industrial land. These include an efficient and constantly evolving logistics system, which is essential for the health and function of London and the wider regional economy. The imperative to manage waste sustainably in London and achieve the London Plan commitment to achieve 85% self-sufficiency by 2020[10] will place additional demands on the existing stock of industrial land in London. Land is also required to support a growing need for public transport functions[11] and utilities infrastructure to meet the needs of London's growing population. If planned for positively, these functional users of industrial land can contribute to London's overarching sustainability objectives and help respond to climate change.

2.4 On the supply side, London had an estimated 5,500 hectares of industrial land in 2006[12], a reduction of 440 hectares since 2001. Approximately 40 per cent of this land lies within allocated SILs (see Section 4). The largest concentrations of industrial land lie in North East and South East London (2,500 hectares combined) and in West London (1,500 hectares). Reports from the Valuation Office indicate that in 2006 London's industrial land accommodated almost 26 million sq m of industrial floorspace, broken down into 10 million sq m of 'factories' and 16 million sq m of warehousing[13].

2.5 The 2006 industrial land estimate for London includes 706 hectares of vacant land, an average vacancy rate of 12.7 per cent, which is a reduction from the rate of 14.7 per cent in 2001. The highest sub-regional rates of vacant land are found in North East and South East London (17 and 16 per cent respectively) and the lowest in South West London (4 per cent). The Valuation Office reports that 11 per cent of London's commercial and industrial floorspace was vacant in 2004/5[14].

National Policy context

2.6 This SPG is drawn up in the context of national policy in PPS1, which sets out the Government's overarching policies on the delivery of sustainable development through the planning system[15]. The SPG also considers how the management of industrial capacity can contribute towards the shaping of places with lower carbon emissions and responding to climate change which are the key concerns of the supplement to PPS1: Planning and Climate Change[16]. The status and procedural considerations relating to this SPG and its relationship with the London Plan and Local Development Documents take account of the general principles established in national policy in PPS11 and PPS12[17].

2.7 The Government's 2007 Planning White Paper[18] recognises that to be competitive, business needs to respond much more quickly to changes in market conditions. It advocates a more responsive and efficient planning system to support vital economic development consistent with wider environmental and social objectives.

2.8 The consultation paper on a new Planning Policy Statement, PPS4 *Planning for Sustainable Economic Development*[19], reinforces the Government's commitment set out in PPS1 and the White Paper to promoting a strong, stable and productive economy with access for all to jobs, to regeneration and improved employment prospects. Draft PPS4 seeks a flexible approach to the supply and use of land[20]. It emphasises that regional planning bodies and local planning authorities should use a wide evidence base to understand both existing business needs and likely changes in the market, to prepare policies to support sustainable economic development in their area[21] and integrate these with infrastructure and housing provision[22].

2.9 This SPG is drafted in the context of Planning Policy Guidance 13's (PPG13) objectives to integrate planning and transport at the national, regional, strategic and local level and to promote more sustainable transport choices both for people and for moving freight.

2.10 Following national planning policy on housing (PPS3)[23], the London Plan places a high priority for housing development on previously developed land[24], in particular vacant and derelict sites and buildings. When reviewing development plans, local planning authorities are encouraged to consider whether sites that are currently allocated for industrial or commercial use could be more appropriately re-allocated for housing or mixed-use development. To support this approach, Government has produced a guidance note on employment land reviews[25] (which itself drew on the GLA's 2003 draft industrial capacity SPG) and Strategic Housing Land Availability Assessments[26]. The Housing Green Paper[27] published for consultation in the summer of 2007, notes that both these guidance notes encourage an integrated approach to carrying out employment and housing land reviews.

2.11 These principles are reflected in the Government's Sustainable Communities Programme[28], which expects Regional and Local Planning Authorities to plan for sufficient housing opportunities to meet housing requirements whilst maintaining the momentum of economic growth.

London Plan policy context

2.12 The London Plan provides the spatial framework for the Mayor's vision to develop London as an exemplary, sustainable world city, based upon strong, diverse long term economic growth; social inclusivity to give all Londoners the opportunity to share in London's future success and a fundamental improvement in London's environment and use of resources. This SPG supports this vision by providing advice on the effective management of land and premises to be retained in industrial and related uses and planning for the release of surplus industrial land to other uses so that it can better contribute to strategic and local planning objectives.

2.13 The SPG draws on the policies set out in the London Plan. The two key policies that form the main basis for this SPG are Policies 2A.10 and 3B.4. These are set out overleaf.

2.14 This SPG reflects not just the two industrial land policies above but also the broader concerns of the London Plan. Of particular relevance is the need to meet the challenges of climate change (Policies I1, 4A.1, 4A.2, 4A.9) and to foster more sustainable forms of development, including quality in design and mixed-use development (especially Policies 2A.1, 3C.1, 4A.3, 4A.20, 4A.33, 4B.1 to 4B.8). The SPG reflects economic and population growth, and provides guidance on releasing industrial land that is no longer needed for new uses (Policy I1, Objective 3, bullet 10) and especially to meet the need for additional housing (Policies 3A.1, 2 and 9).

Policy 2A.10 Strategic Industrial Locations
Boroughs should identify Strategic Industrial Locations in DPDs taking account of Policy 3B.4, Annex 2*, Sub-Regional Implementation Frameworks and Supplementary Planning Guidance.

The Mayor will continue to develop more detailed frameworks to manage the appropriate release of land in those SILs designated in Annex 2*.

Policy 3B.4 Industrial Locations
With strategic partners, the Mayor will promote, manage and where necessary protect the varied industrial offer of the Strategic Industrial Locations (SILs – Policy 2A.10), set out in Annex 2* as London's strategic reservoir of industrial capacity. Boroughs should identify SILs in DPDs, and develop local policies and criteria to manage Locally Significant and other, smaller industrial sites outside the SILs, having regard to:

- the locational strategy in Chapters 2 and 5 of this plan, Supplementary Planning Guidance and Sub-Regional Implementation Frameworks
- accessibility to the local workforce, public transport, walking and cycling and where appropriate, freight movement
- quality and fitness for purpose of sites
- the need for strategic and local provision for waste management, transport facilities, logistics and wholesale markets within London and the wider city region
- integrated strategic and local assessments of industrial demand to justify retention and inform release of industrial capacity in order to achieve efficient use of land
- the potential for surplus industrial land (as defined in assessments) to help meet strategic and local requirements for a mix of other uses such as housing and social infrastructure and where appropriate, contribute to town centre renewal.

* Annex 2 of the London Plan comprises a Schedule of the Strategic Industrial Locations

2.15 In considering the functionally important uses of industrial land in Sections 5 to 7, this SPG draws upon London Plan policies on waste and recycling (especially Policies 4A.21 to 4A.29); policies concerning logistics, freight and land for transport functions (notably Policies 3C.4, 3C.25, 3C.26, 4C.8, 4C.9 and 4C.20) and policies concerning energy and utilities (Policies 4A.4 to 4A.8 and 4A.16 to 4A.18). The SPG considers the needs of firms of different sizes including SMEs; new and emerging industries; measures to encourage innovation and the importance of a

skilled labour supply for London's industry and related sectors (Policies 3B.1, 3B.5, 3B.8, 3B.10 and 3B.11).

Relationship to other Mayoral Strategies and Guidance

2.16 This SPG is related closely to other Mayoral strategies including those for Economic Development, Transport, Housing, Municipal Waste, Noise, Air Quality, Biodiversity and Culture and London Employment and Skills Strategy (Draft). It also has close links to the Mayor's Climate Change Action Plan, and strategies for Energy, Childcare, Food, Water (draft) and his other SPGs on Land for Transport Functions, Housing, Sustainable Design and Construction, Accessible London, Planning for Equality & Diversity and forthcoming SPGs on Renewable Energy, Town Centres and the Central Activities Zone (CAZ). Section 5 of this SPG is related closely to aspects of the London Freight Plan and the London Rail Freight Strategy.

2.17 The ongoing implementation of London Plan and other Mayoral policies will be addressed in the Mayor's Sub-Regional Implementation Frameworks (SRIFs). These will contain more geographically specific guidance for the London Plan sub-regions and will distinguish between matters relating to the central, inner and outer parts of each sub-region. They will integrate the current Sub-Regional Development Frameworks (SRDF), Sub-Regional Economic Development Implementation Plans (SREDIP) and sub-regional transport network plans. Their status, as with the SRDFs, will be informal non-statutory documents but as they will devolve from a statutory development plan and will be published by the Mayor, they will be material considerations for planning purposes.

2.18 This SPG does not seek to duplicate the guidance in these Mayoral strategies, action plans, SPGs and SRIFs but instead provides signposts to these documents and/or supplementary advice where appropriate.

3 The Plan, Monitor and Manage Approach for Industrial Capacity

3.1 This SPG has been designed around the national and London Plan approach to 'planning, monitoring and managing' development[29]. These components are each discussed in turn.

Planning for industrial land

3.2 London Plan Policies 2A.10 and 3B.4 set out a plan-led approach to promoting and managing industrial capacity through three types of location:

(i) Strategic Industrial Locations – a resource which must be sustained as London's main reservoir of industrial capacity but nevertheless must itself be subject to periodic review and consolidation where appropriate, to reconcile demand and supply;

(ii) Locally Significant Industrial Sites – the protection of which needs to be justified in assessments of supply and demand for industrial land reviews and identified in Development Plan Documents (DPDs); and

(iii) other smaller sites that historically have been particularly susceptible to change, which in some circumstances can better meet the London Plan's objectives in new uses but in others will have a continuing local and strategic role for sustainable industrial uses. This sub-category will continue to be that most susceptible to change (further guidance is provided in Section 4).

3.3 Citing as good practice the Mayor's approach to planning industrial capacity[30], the Government has underscored the importance of regular strategic and local assessments of demand and supply of industrial land in the plan-led approach. The latest strategic research[31] for the GLA provides a comprehensive update of the previous 2004 strategic assessment[32] of industrial land demand and supply in London. Specifically, the latest study is based upon a more robust estimate of the supply of industrial land in London (including detailed site surveys in North East and South East London[33]). On the demand side, the study takes into account the latest employment projections from GLA Economics[34] and a detailed assessment of the more specific land requirements of a full range of industrial type uses and functions, most importantly logistics[35], waste[36], utilities, transport and wholesale markets[37].

3.4 Figure 1 indicates the overall projected demand from these broad uses for the period 2006-2026. Reflecting employment trends, the land demand for general industrial uses is expected to decline by some 930 hectares. However, the additional land demand for logistics (warehousing), waste management/ utilities and public transport is not directly related to

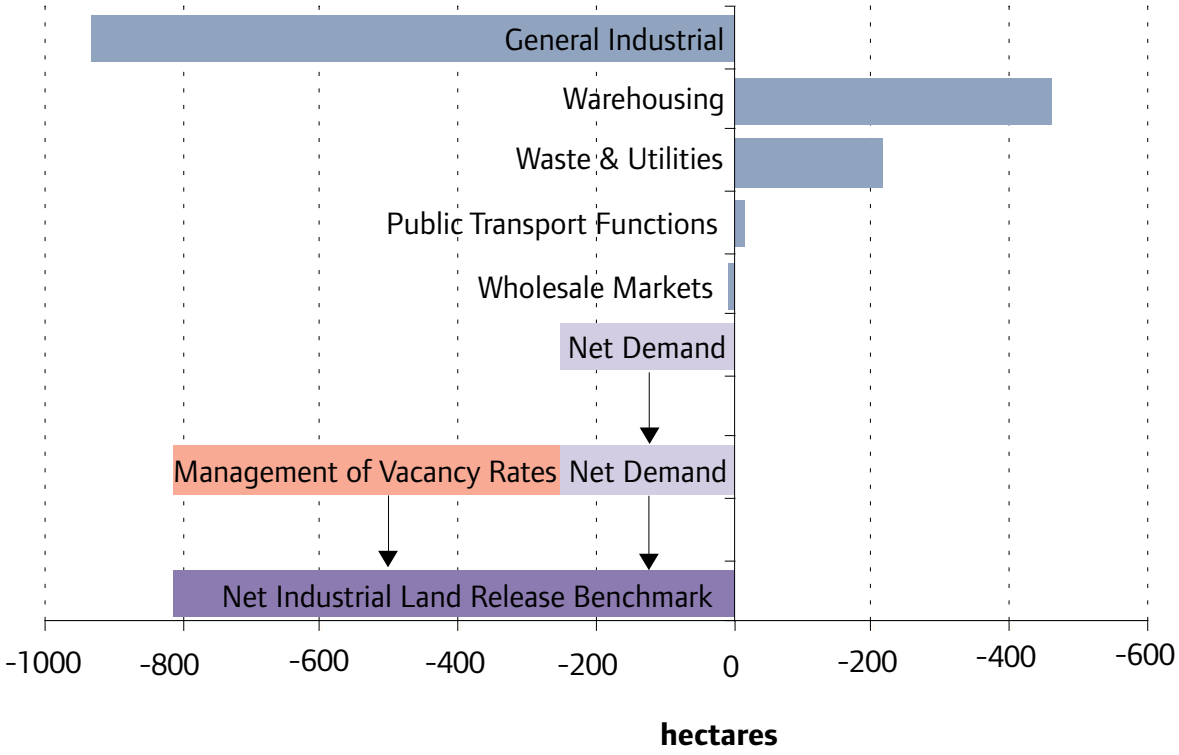
employment trends and is projected to increase by 460, 215 and 12 hectares respectively. Taking into account a marginal reduction in the land demand for wholesale markets, the net balance of industrial land demand is an overall reduction of 254 hectares.

3.5 The estimated 706 hectares of vacant industrial land in London in 2006 represents 12.7 per cent of the total stock. There is significant scope, especially in North East and South East London to reduce this vacancy rate. However, to enable the industrial land market to operate smoothly it is appropriate to allow for some vacant land at any given time – known as 'frictional vacancy'.

3.6 Research[38] indicates that there is an annual average take up of industrial land of around 50 hectares or about 1 per cent of the total industrial land stock. Allowing for time between one occupier moving out of a site and another moving in, the consultants estimated that a reasonable rate of frictional vacancy at any given time approximates to 5 per cent of the industrial land stock and 8 per cent for floorspace. In preparing local assessments, boroughs are encouraged to manage vacancy rates for land and premises and to make an allowance for frictional vacancy of about 5 per cent of the total land stock and 8 per cent for industrial floorspace. This represents a more rigorous assumption for the management of vacancy rates than was allowed for in previous research undertaken in 2004 and is anticipated to yield approximately 560 hectares for transfer to other uses (see Figure 1).

3.7 Having regard to the net reduction in industrial land demand and the careful management of vacancy rates, the London Plan[39] indicates that there is scope to release 41 hectares per annum between 2006-2026 or a total of around 814 hectares (see Figure 1 and Table 1). The London Plan[40] indicates that there is scope for a higher rate of release (48 hectares per annum) during the early period 2006-2016 as a result of declining demand for industrial land and rigorous management of vacancy rates. In the later period 2016-2026 the overall scope for release falls to 33 hectares per annum.

Figure 1. Components of London industrial land release benchmarks, 2006-2026



Source: URS (2007) & GLA

Table 1. Indicative industrial land release benchmarks, 2006-2026

Sub-Region	2001-2006 (ha)	2006-2011 (ha)	2011-2016 (ha)	2016-2021 (ha)	2021-2026 (ha)	Total 2006-2026 (ha)
North	104	54	49	44	40	**187**
North East	201	144	87	73	62	**366**
South East	82	61	29	31	25	**146**
South West	10	13	17	17	16	**63**
West	55	15	15	11	11	**52**
London	**452**	**287**	**197**	**176**	**154**	**814**
Average p.a.	**90**	**48**		**33**		**41**

Source: URS, (2007) Note that the figures are rounded

3.8 Table 1 presents the monitoring benchmarks for release for London's sub-regions[41]. The benchmarks are indicative and a guide to inform the management of industrial land and premises and to reduce vacancy rates in

London towards the frictional rates set out in paragraph 3.6 above. They provide the wider context for boroughs in preparing DPDs and will form the basis for sub-regional monitoring of the retention and release of industrial land through forthcoming Sub-Regional Implementation Frameworks (SRIF).

3.9 There are wide geographical variations in the demand and supply balance across London, its sub-regions and within boroughs. Due to constraints on the quality, availability and nature of the current supply, there are local shortfalls in quality modern floorspace and readily available development land, particularly in parts of West and South West London. Supply is less constrained in the North East and South East sub-regions but the distribution of release of surplus capacity must be managed carefully to ensure that sufficient industrial land is retained in locations to support sustainability objectives. Integrated action by the LDA, boroughs and other relevant agencies in the sub-regions is essential to bring forward the most attractive sites at a time when the planning process must manage selective release of strategically surplus capacity to other uses. There is also need to coordinate the management of industrial capacity to meet the distinct needs of the Central Activities Zone (CAZ)[42]. The forthcoming CAZ SPG will provide further specific guidance on this matter.

3.10 The release of industrial land should be concentrated in the North East and South East sub-regions. Most release across London is expected to come from smaller sites though in the North East and South East sub-regions there is also particular scope for structured release of some SILs. In line with the London Plan these should be planned and coordinated in collaboration with boroughs and other partners through SRIFs and detailed boundaries identified in DPDs. Elsewhere release will be at significantly lower levels, especially in West and South West London and concentrated largely on other smaller sites, outside of SILs.

3.11 To inform planning for land use change in those sub-regions with the greatest concentrations of surplus industrial land, more geographically specific quantified guidance on the borough distribution of the sub-regional monitoring benchmarks is provided in Annex 2 for boroughs in North East and South East London. In North, West and South West London, the SRIF process will assist boroughs to develop an appropriate borough distribution of the sub-regional monitoring benchmarks in those sub-regions. This should take into account the guidance below in paragraphs 3.12 to 3.16 and more local assessments of demand.

3.12 All the boroughs are classified in Table 2 and Figure 2 into three groupings, reflecting the broad approach they should adopt to the release

of industrial land. The classification takes into account the projected demand from all types of industrial activity and the supply of capacity including the balance between strategically important (and usually strategically protected) capacity and smaller sites that are subject to policy which reflects the local interpretation of broad strategic policy.

3.13 Together with the quantitative guidelines set out above, this classification should be used to inform more local assessments of supply and demand. Boroughs are advised to ensure that local assessments are integrated with the GLA's most up to date strategic industrial land studies and to use common data and assumptions where feasible.

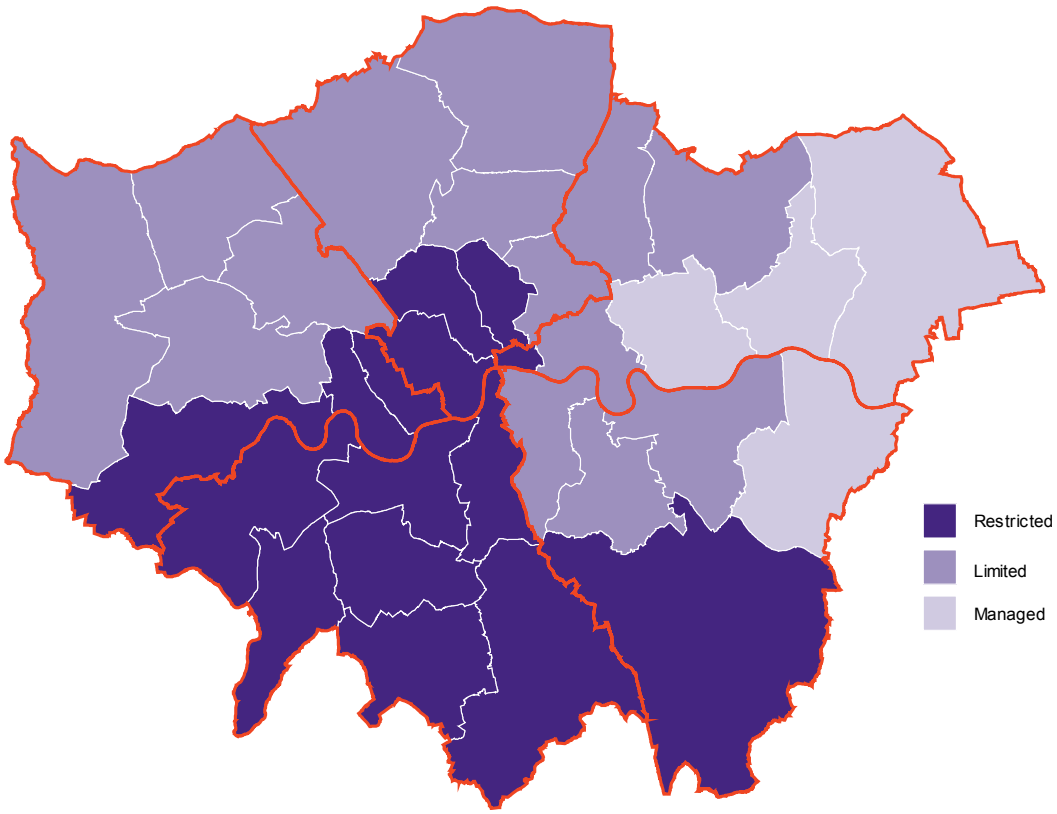
Table 2 Borough level groupings for transfer of industrial land to other uses

Restricted transfer of industrial sites	
North	Camden, Islington, City of Westminster
North East	City of London
South East	Bromley
South West	Croydon, Kingston, Lambeth, Merton, Richmond, Sutton, Wandsworth
West	Hammersmith & Fulham, Hounslow, Kensington & Chelsea

Limited transfer of industrial sites	
North	Barnet, Enfield, Hackney, Haringey
North East	Redbridge, Tower Hamlets, Waltham Forest
South East	Greenwich, Lewisham, Southwark
West	Brent, Ealing, Harrow, Hillingdon

Managed transfer of industrial sites	
North East	Barking & Dagenham, Havering, Newham
South East	Bexley

Figure 2 Borough level groupings for transfer of industrial land to other uses



3.14 Within boroughs (and the general level of demand indicated for them) there can be marked local differences in the demand and supply of industrial space. It will be for boroughs to justify and address these local departures from general market conditions prevailing in their areas.

3.15 The borough level groupings were identified first by consultants[43] in 1999 to reflect the sub-regional balance between industrial land demand and supply suggested by market experience as well as broader economic indicators. The groupings were updated in 2004[44] and again in 2007 in the light of recent research[45] taking into account the following indicators:

- Overall stock of industrial land relative to the market area (see paragraph 5.10)
- Current levels of vacancy, both land and buildings
- Current rental values
- Proportion of both built-on and vacant industrial sites within SILs
- Demand for warehousing land
- Demand for general industrial premises
- Apportionment of waste facilities

- Other demands on industrial land, such as transport functions and wholesale markets
- Industrial land demand projections in relation to the market area
- Short-term and long-term phasing of the industrial land release benchmarks

3.16 In developing site specific allocations, policies and criteria for the retention and release of industrial sites, boroughs are asked to have regard to the following broad categorisations and more local differences in supply and demand:

(i) *Managed Transfer*: Boroughs in this category generally have a greater supply of vacant industrial sites relative to demand and should generally adopt a rigorous but sensitively managed approach to transfer. There may also be scope for reconfiguration of the existing industrial land portfolio to safeguard the best quality sites and secure adequate capacity for waste, logistics and other functionally important uses whilst maximising the potential of land released to other uses. Planning Frameworks will play a key role in managing change in SILs in Opportunity Areas. The phasing of release should have regard to the need to reduce vacancy rates for land and premises towards the frictional rates set out in paragraph 3.6.

(ii) *Restricted Transfer*: Boroughs in this category typically have low levels of industrial land relative to demand (particularly for waste management or land for logistics) and/or low proportions of industrial land within the SIL framework. Boroughs in this category are encouraged to adopt a more restrictive approach to the transfer of industrial sites to other uses. This does not preclude the possibility of smaller scale release where boroughs have made adequate provision of industrial land in their DPDs in particular for waste management and logistics uses.

(iii) *Limited Transfer*: This category is intermediate between the managed and restricted categories above. Taking account of local variations of demand boroughs are encouraged to manage and where possible, reconfigure their portfolios of industrial land, safeguarding the best quality sites and phasing release to reduce vacancy rates for land and premises towards the frictional rates set out in paragraph 3.6.

3.17 The strategic assessments of industrial land are integrated with assessments of housing capacity[46] and need for new waste facilities[47]. Further guidance on a methodology and principles for delivering such an

integrated approach to industrial and housing land reviews is set out in the London Housing Capacity Study[48].

3.18 In planning for industrial land in DPDs, boroughs are also encouraged to take into account the three-stage approach in the Government's guidance note[49], which includes: 'taking stock of the existing situation'; 'creating a picture of future requirements'; and 'identifying a new portfolio of sites'. Local assessments can go further than the strategic industrial land assessments with regard to the qualitative characteristics of locations and specific sites (see paragraphs 4.11 to 4.13 and Section 9). Local demand and supply assessments should involve a structured consideration of the qualities of industrial sites in the borough in comparison with the continuing needs of the area having particular regard for waste management, logistics, utilities and transport functions and the sites available to meet those needs.

Monitoring

3.19 Accurate monitoring of the demand and supply of industrial land has a crucial role to play in a situation where overall land supply in London is finite and competing demands on it are strong. In such dynamic circumstances, timely information is essential to inform the management of land and keep policy responsive to changes in supply and demand relationships.

3.20 At the London-wide, sub-regional and borough level there is a need to monitor annually the actual rate of industrial land release against the monitoring benchmarks set out in the London Plan[50] and the phasing and geographical distributions of these benchmarks set out in this SPG (Table 1 and Annex 2).

3.21 Similarly, it will be essential to check that within this trend, there is continuing take-up of industrial land of about 50-55 hectares per annum for new development[51]. These will be key monitoring benchmarks. To test them locally and strategically will require a robust understanding of both demand and supply, particularly outside the SILs where, according to policy, most of the change should be taking place.

3.22 Other appropriate sub-regional and borough-level benchmarks to inform policy for industrial land include:

(i) Overall stock of industrial land and premises;
(ii) Supply of vacant industrial land and premises;
(iii) Gross/net industrial permissions, under construction and completions;
(iv) Gross/net take-up of industrial land and premises;

(v) Industrial land and property changes of use and demolitions;
(vi) Industrial rental values, land values, yields and robust marketing assessments;
(vii) Businesses' demands.

3.23 Estimates of items (i) and (ii) above for 2006 are contained within recent GLA research[52] and through the Valuation Office annual monitoring reports for floorspace and premises[53]. The LDA have commissioned a Brownfield Land Review in association with English Partnerships, which can also contribute towards ongoing monitoring of the stock of vacant, derelict and underused industrial land and premises. Annual data for items (iii), (iv) and (v) can be monitored through a combination of the London Development Database managed by the GLA with data from the boroughs; Land Use Change Statistics[54] and the National Land Use Database[55]. Up to date information on industrial rental values, land values, yields and market perceptions are often reflected in property market press and business' demands in spatial and sector-based studies for the LDA and in more local assessments.

3.24 All of the sub-regional and borough level benchmarks in paragraphs 3.20 to 3.22 above can be monitored periodically through ongoing strategic and local assessments of industrial land supply and demand. Progress towards the indicative sub-regional monitoring benchmarks for industrial land release shown in Table 1 can be identified in SRIF and Annual Monitoring Reports.

3.25 Having regard to the London Plan monitoring benchmark and guidance in SPG and SRIF, the outputs of monitoring can inform the management of industrial land accordingly by the Mayor, boroughs and other stakeholders. Just as the most recent sub-regional review led to an 8 per cent reduction in overall area covered by the SIL framework and informed boroughs on the approach to be taken to future provision, cumulative assessment of the changes suggested by these monitoring indicators will inform longer term reviews of the core SIL and local industrial capacity.

Managing industrial land

3.26 The following guidelines are intended to move towards a strategic framework for the active management of industrial land in London. Guidance on interpretation of the London Plan approach to managing the transfer of surplus industrial land to other uses, mixed-use development, the quality of development and provision for smaller firms is set out in Sections 8 –10 of this SPG.

3.27 Land should be managed to support strategic and local objectives for the economy, social inclusion and the environment. In line with PPSs 11 and 12, and the Planning White Paper, the London Plan is integrated with the Mayor's Economic Development, Transport and other Strategies and the Climate Change Action Plan.

3.28 Both the London Plan and this SPG complement the Economic Development Strategy (EDS) through support for clusters of related activities by protecting SILs where necessary and ensuring that clustering is a key factor to be taken into account when managing the release of surplus industrial land outside these locations.

3.29 In managing and reviewing industrial capacity, including SILs, account should be taken of the scope for consolidating industrial capacity at particularly appropriate locations. This should be considered in the light of strategic and local assessments of industrial land demand and supply (quantitative and qualitative) and must be informed by an accurate appreciation of short and longer term market trends and policy guidance (see Section 4). It must also be cast in the context of robust and sensitive relocation arrangements, which ensure that London jobs, and Londoners' access to them, are not compromised. This exercise must be coordinated strategically (and structured to minimise 'hope value'[56]) taking account of transport and regeneration as well as planning objectives to ensure that London's overall future industrial needs are addressed including in particular for waste management, logistics, utilities and public transport functions.

3.30 Where the consolidation of industrial land involves the release of land from a SIL, the GLA group will coordinate this process in collaboration with boroughs and other partners through the SRIF and incorporate the outcomes into future reviews of the London Plan. As indicated in London Plan Policy 2A.10, the Mayor will continue to work with boroughs and other partners to develop frameworks to manage the appropriate release of land where it affects SILs. These may take the form of Opportunity Area Planning Frameworks (OAPF) where appropriate and/or spatially specific masterplan frameworks. The Lower Lea Valley OAPF[57] provides an example of good practice in this regard. These frameworks can inform detailed boundary reviews of SILs through the formal DPD process.

3.31 Land released as a result of such consolidation exercises must be re-used to meet strategic as well as local priorities. Housing, including affordable housing,[58] and appropriate mixed development will be the key priority. Borough experience has shown that with proper planning and management procedures and given the link between population and employment, new housing generates rather than crowds out local jobs[59].

Paragraph 3.157 of the London Plan recognises that industrial land release can also provide capacity for social infrastructure such as education, health, emergency services, prisons, places of worship and other community facilities. Increasing capacity for town centre related development in accordance with London Plan Policies 2A.8, 3D.1–3D.3 is also an important consideration in appropriate locations (see Section 8).

3.32 This guidance for industrial consolidation in no way weakens the objective of London Plan Policies 2A.10 and 3B.4 to secure an adequate supply of industrial capacity. Boroughs, developers and landowners must take this as a clear statement of policy principle. Attempts to realise 'hope value' through proposals for unacceptable alternative development within SILs will be strongly resisted.

SPG 1 – Industrial Capacity and the Plan, Monitor and Manage Approach*

In implementing London Plan Policies 2A.10 and 3B.4, the Mayor will and the LDA, TfL, boroughs and other partners are asked to:

(i) adopt a positive 'plan-monitor-manage' approach to planning for industrial land in London to bring demand and supply into closer harmony;

(ii) undertake integrated strategic and local assessments of the quantitative and qualitative supply and demand for industrial land having regard to the range of industrial type activities indicated in paragraph 1.8 of this SPG to inform the retention of industrial land in DPDs and the release of surplus capacity to other uses. These assessments should be integrated with assessments of housing capacity and need for new waste facilities;

(iii) take into account the broad phasing and sub-regional distribution of the London-wide monitoring benchmark for industrial land release set out in Table 1;

(iv) take account, when developing site specific allocations and policies in DPDs, of the qualitative borough categorisations for Restricted, Limited and Managed transfer of industrial land to other uses in Table 2 and Figure 2, and the quantitative monitoring release benchmarks outlined for North East and South East London boroughs in Annex 2;

(v) consider in light of strategic and local assessments the potential to consolidate and intensify industrial uses in appropriate locations and

establish effective re-location arrangements in the context of national and regional policy. The GLA group will coordinate this process as it affects SILs;

(vi) use the Sub-Regional Implementation Framework process to manage and coordinate the borough distribution of release/retention of industrial land within sub-regions and inform site allocations and policies in DPDs;

(vii) use the Sub-Regional Implementation Framework process to coordinate changes to the SILs so that these can be considered in a future review of the London Plan and where appropriate, develop frameworks to manage the release of land and inform detailed reviews of SIL boundaries through the DPD process;

(viii) ensure that sites released from industrial use meet strategic as well as local needs. The priority should be to meet the need for housing, including affordable housing, and appropriate mixed development. Increasing capacity for social infrastructure and town centre related development will also be important in appropriate locations;

(ix) monitor industrial land and policy development benchmarks having regard to those indicators set out in paragraph 3.20 to 3.22 of this SPG and coordinate this on a London-wide and sub-regional basis.

The spatial expression of this guidance is that:

(x) release of industrial land should generally be focussed on smaller sites outside of the SIL framework;

(xi) industrial land in Strategic Industrial Locations and strategically recognised Locally Significant Industrial Sites should in general be protected, subject to guidance elsewhere in this SPG and except in parts of North East and South East London where there is scope for strategically coordinated further release from some SILs;

(xii) there is need for partnership working to see that adequate provision in inner London is sustained, and where necessary enhanced, to meet the distinct demands of the Central Activities Zone for locally accessible, industrial type activities.

* To assist with the interpretation of SPG1, an explanatory diagram is provided in Annex 1.

4 The Strategic Industrial Locations Framework and other industrial provision

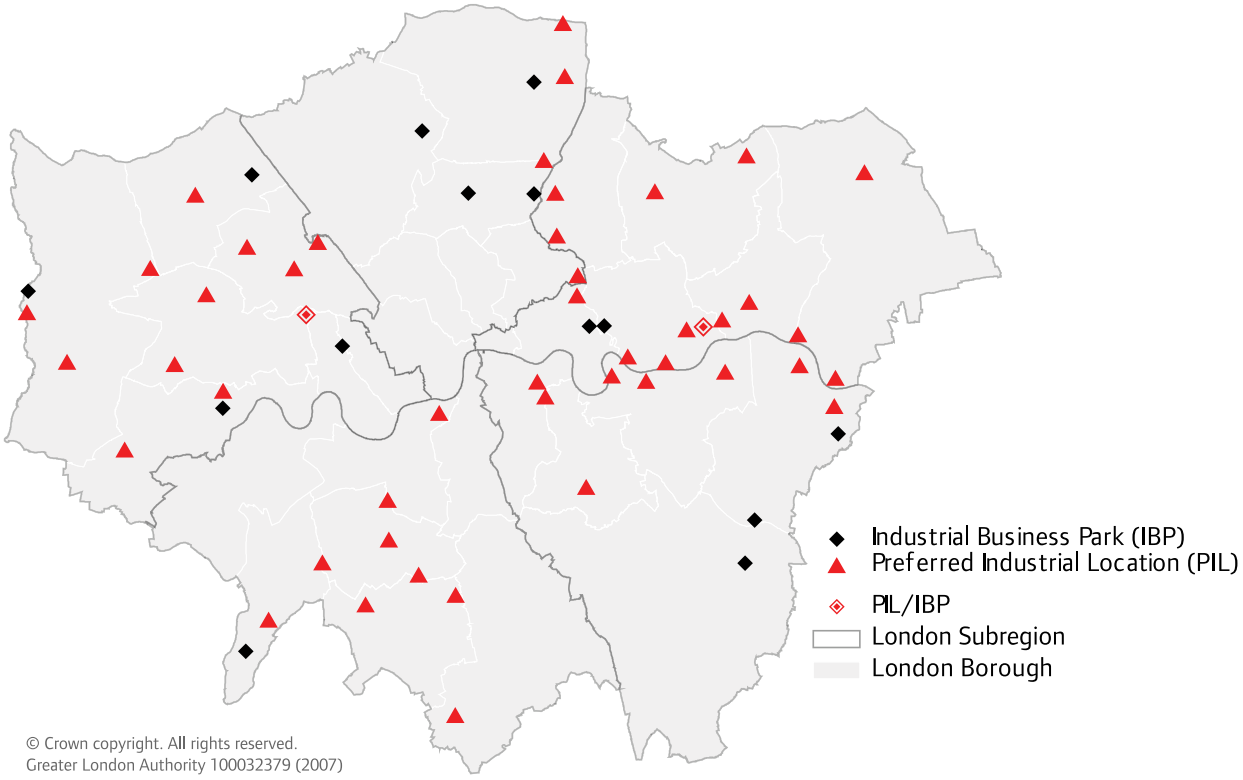
4.1 London Plan Policies 2A.10 and 3B.4 set out a plan-led approach to promoting and managing industrial capacity through three types of location which are considered in turn in this section.

(i) Strategic Industrial Locations.
(ii) Locally Significant Industrial Sites.
(iii) Other smaller industrial sites.

Strategic Industrial Locations

4.2 SILs as identified in the London Plan and illustrated in Figure 3 are London's main reservoir of industrial land comprising approximately 40 per cent of London's total supply[60] (see Annex 2). Most of the SILs are over 20 hectares in size although in some areas, especially parts of West and South West London where there is particular pressure on industrial land (see paragraph 3.9), smaller locations, for example of 10 hectares, can be of strategic importance. Typically, SILs are located in close proximity to the strategic road network and many are well located with respect to rail, river and canals and safeguarded wharves (see diagram in Annex 4). The relationships between industrial land and sustainable transport modes for logistics and waste are considered in more detail in Section 5 and 6.

Figure 3. The Strategic Industrial Locations Framework



4.3 To meet the needs of different types of industries, the London Plan identifies two broad categories of SIL[61]:

(i) **Preferred Industrial Locations (PILs)** are suitable for firms that have less demanding environmental requirements and typically fall within the B1(c), B2 and B8 Use Classes. They are also suitable for waste management and recycling uses, utilities and some transport-related functions such as rail and bus depots and inter-modal freight facilities. PILs will not normally be suitable for B1(a) and B1(b) uses, although some ancillary B1(a) use is acceptable and some transfer between these classes may be inevitable under the General Permitted Development Order. PILs will not normally be suitable locations for large scale B1(a) office development. Nevertheless, they may be appropriate for other uses of an industrial nature, including some of those classified as *sui generis* such as car breaking, metal re-cycling, aggregate processing, iron and steel pre-fabrication. However, this cannot be taken as a general policy position, not least because, by their nature, *sui generis* uses must be treated on their individual merits.

(ii) **Industrial Business Parks (IBPs)** are for firms that need better quality surroundings. These are usually B1(b), B1(c) and high value-added B2 activities. Generally they require significantly less heavy goods access and are able to relate more harmoniously with neighbouring uses than those in PILs. IBPs are not intended for primarily B1(a) office development. Where B1(a) office development is proposed on an IBP, this should not jeopardise local provision for B1(b) and B1(c) accommodation, where there is demand for these uses, or alter the industrial character of these areas. Any B1(a) proposal, including redevelopment of existing offices, should comply with the London Plan's office policies[62], particularly in terms of location and public transport access.

4.4 The SIL framework (formerly known as the Strategic Employment Locations framework) has proved a valuable tool in promoting London's principal industrial locations[63]. The revised SIL framework in the London Plan represents an 8 per cent contraction on the 2000 framework[64]. The main transfers over this period have arisen from the consolidation of SILs in the Lower Lea Valley as part of the proposals for the Olympic and Paralympic Games[65] and in London Riverside (Rainham Marshes). Most of the historic change from industrial to other uses has been among smaller sites outside the SIL framework. Recent investments in some SILs suggest that the character and composition of some PILs are changing into IBPs.

Where appropriate changes to these SILs can be identified in SRIFs and considered for reclassification in future reviews of the London Plan.

4.5 If the pan-London approach to industrial capacity is to be effective, it must be implemented and sustained by boroughs consistently. Departures from it will send confused messages to developers and tend to increase the 'hope value' of land making it uncompetitive for industry or even lead to it being kept vacant and out of productive, industrial use. Changes to the SIL framework should therefore only be undertaken in the light of strategic reviews of industrial demand and supply and coordinated through SRIF (see Section 3).

SPG 2 – Strategic Industrial Locations Framework

In implementing London Plan Policies 2A.10 and 3B.4, the Mayor will and the LDA, TfL, boroughs and others partners are asked to:

(i) promote the SILs as the main strategic reservoir for industrial activity in London;

(ii) where relevant in their strategies, DPDs and other plans, identify the components of the SIL framework namely the Preferred Industrial Locations and Industrial Business Parks;

(iii) manage the differing offers of PILs and IBPs through coordinated investment, regeneration initiatives, transport and environmental improvements and the use of planning agreements, and provide local planning guidelines to meet the needs of different types of industry appropriate to each having regard to paragraph 4.3;

(iv) resist the development of non-industrial uses within the SIL other than as part of a strategically coordinated process of consolidation (see Section 3) except where they provide local, small scale, 'walk to' services for industrial occupiers e.g. workplace crèches, or office space ancillary to industrial use.

Locally Significant Industrial Sites

4.6 Boroughs may designate as Locally Significant those industrial sites which lie outside the SIL framework but which robust demand assessments and the criteria set out in paragraphs 4.11 to 4.13 show to warrant protection because of their particular importance for local industrial type functions. Inner London sites providing sustainable distribution services for the Central Activities Zone may be particularly appropriate for this designation. Providing they are in other respects in general conformity with the London Plan they will be accorded the same degree of strategic

protection as SILs in line with London Plan Policy 3B.4. Boroughs are asked to make explicit in DPDs the types of uses considered appropriate in Locally Significant Industrial Sites and to distinguish these from broader based Defined Employment Areas.

SPG 3 – Locally Significant Industrial Sites
To implement London Plan Policy 3B.4 outside the SIL framework, boroughs are encouraged to designate Locally Significant Industrial Sites in DPDs and associated Proposal Maps for enhancement and protection, subject to robust strategic and local evidence of demand and taking into account the criteria set out in paragraphs 4.11 to 4.13.

Other industrial sites

4.7 Strategic policy cannot and should not cover other individual small sites that are not designated in DPDs - this must be a borough matter. However, 'other industrial' sites combined with Locally Significant Industrial Sites provide 60 per cent of industrial land and cumulatively are of strategic importance in meeting London's industrial requirements and, if surplus to demand, in meeting other land use needs. A coordinated approach to managing their future is therefore required. Strategic policy guidance can therefore usefully provide criteria for refinement in light of local circumstances in line with London Plan Policy 3B.4.

SPG 4 – Other Industrial Sites
In implementing London Plan Policy 3B.4 to develop policies and criteria in DPDs to manage the release or retention of other smaller industrial sites outside the SIL framework and not designated on Proposals Maps, boroughs are asked to take account of strategic and local assessments of supply and demand (paragraphs 3.2 to 3.18) and have regard to the qualitative criteria in paragraphs 4.11 to 4.13.

Industrial Site Retention/Release Criteria

4.8 Three sets of criteria, which may justify the retention, or release of a site in industrial use are set out in paragraphs 4.11 to 4.13. The criteria are based on general economic and land use factors and indicators of industrial demand. In developing criteria-based policies, boroughs should seek to retain those sites in industrial use that are functionally the most important for industrial users. These will generally include the better quality industrial sites, but may also include poorer quality sites that provide scope for low cost industrial accommodation for which there is demand. The criteria should be used in the context of the broader strategic and local indicators of industrial demand and then in the context of policies which guide changes to priority uses for surplus industrial land (see Section 3).

4.9 These criteria should be used in conjunction with the demand-based land release guidance provided in paragraphs 3.2 to 3.18. They can usefully inform the assessment and management of SILs (coordinated by the GLA through the process set out in SPG1), Locally Significant Industrial Sites as well as other smaller industrial sites.

4.10 Boroughs are asked to have regard to the criteria set out in paragraphs 4.11 to 4.13 below when considering site specific allocations and proposals and when developing criteria based policies in DPDs.

4.11 *Economic criteria*, including whether a site:

(i) meets demonstrable local short term demand for industrial development, and / or strategic long term demand;

(ii) offers potential for the in-situ expansion of existing industrial businesses;

(iii) supports local or strategically important clusters of industrial activity;

(iv) meets demand and addresses the particular needs of waste management, recycling, energy, transport and utilities and enabling waste to be managed in one of the nearest appropriate installations;

(v) meets demand for new or emerging industries, especially those identified in London Plan Policies 3B.5, 7, 8 and 10;

(vi) is well located to take advantage of existing or proposed infrastructure or economic development / regeneration funding;

(vii) offers potential for the provision of small industrial units serving local residential and commercial areas, particularly where there is little alternative provision in the local area;

(viii) is needed to accommodate provision for transport in terms of Mayoral guidance on provision for transport and safeguarding river related uses, for example, bus garages, rail depots, interchanges and terminals, wharves, boat yards and inter-modal sites;

(ix) provides lower cost industrial accommodation suitable for small, start-up, or lower-value industrial uses or other industrial related businesses important to the local economy.

4.12 *Land use criteria*, including whether a site:

(i) is well located in relation to the strategic highway network or local highway network, in particular causing minimal traffic impact in residential areas;

(ii) is well located in relation to the rail, river or canal network including inter-modal rail heads and safeguarded wharves, offering potential for transport of goods by rail and/or water transport;

(iii) is located within or adjacent to a town centre or the Central Activities Zone, recognising that PPS6 and PPG13 promote high trip generating uses at such locations;

(iv) is well located in relation to public transport facilities, recognising that many industrial activities have relatively low trip generation and that other land uses (such as offices, leisure and retail) may be more appropriate in locations with high public transport accessibility;

(v) is part of a larger area of existing industrial activity, or area designated for industrial protection, where re-designation of the industrial site would alter the industrial character of the area or inhibit the operations of nearby industrial uses;

(vi) offers potential for 24-hour working, or provides facilities for 'bad neighbour uses'[66] without detriment to residential amenity, being well screened from neighbouring uses, particularly residential areas;

(vii) offers potential for waste management or recycling uses;

(viii) offers potential for space intensive activities which do not fall within the ambit of this SPG and would not, in this location, compromise wider planning objectives;

(ix) provides sufficient space for adequate operational parking (see London Plan Policy 3C.23 and Annex 4) and turning space for goods vehicles.

4.13 *Demand based* criteria including whether a site

(i) has been adequately marketed through a commercial agent at a price that reflects market value for industrial use for a reasonable period (normally at least two years) and with potential for industrial redevelopment where this is required to meet the needs of industrial users;

(ii) has been vacant for a considerable period (normally at least two years, and up to five years in areas of generally strong demand), without realistic prospect of industrial re-use.

5 Logistics and Warehousing

5.1 Efficient logistics systems and supporting infrastructure to distribute goods to, from and within London are essential to the competitive offer of almost all London's economic sectors and to sustain future economic and demographic growth. London will need to accommodate a projected 15 per cent increase in freight movement by 2025[67]. Directly and indirectly logistics and supporting infrastructure also have implications for Londoner's quality of life. They can provide modern, economically sustainable employment opportunities. In the right location and especially when associated with appropriate transport management and modal choices they can also mitigate traffic generation and reduce atmospheric pollution, so contributing to broader sustainability and climate change objectives (see Section 9).

5.2 Policy 3B.4 of the London Plan underscores the need to make provision for logistics functions serving the city region. The London Plan also emphasises the interrelationships with neighbouring regions and the need for a coordinated approach to logistics provision across the wider South East[68]. Guidelines on the relationship between transport and freight are set out in the London Plan, particularly Policies 3C.25 and 3C.26, the Mayor's Economic Development[69] and Transport Strategies[70] and the London Freight Plan[71].

Logistics trends

5.3 The nature of wholesale distribution has changed considerably over the last 30 years as logistics have become more sophisticated in response to global trends and to meet the needs of the large and complex London market. The industry is particularly affected by customer requirements for 'just in time delivery', the growth in internet-driven home deliveries and concerns of the wider public about the environmental impact of freight distribution.

5.4 In the past there has been a view that warehouse development in general industrial areas should be resisted on the ground that employment opportunities are fewer and inferior to those provided by manufacturing firms. However, logistics is one of the major sources of employment growth in the industrial sector[72] and some warehousing employment densities can approach those of some manufacturing industries, especially when associated with related assembly, packaging or office employment[73]. They typically comprise a mix of professional, skilled, semi-skilled and unskilled jobs.

5.5 In conventional stocked warehouses, inventories tend to be rising as a result of increases in sales, product line expansions and global product sourcing with longer lead times. At the same time, self-storage facilities

have emerged strongly in recent years in response to consumer demand and close to the markets that they serve.

5.6 Since the introduction of just-in-time working practices in many distribution companies, with an emphasis on throughput rather than storage, access to an efficient transport network has become a more critical locational factor. Faster throughput is enabling the reduction of some storage inventories through the use of consolidation, merge-in-transit and cross-docking centres and stockless warehouses, with the emergence of large, high-bay, modern warehouses close to major transport arteries. Urban Consolidation Centres (UCCs) can bring together a number of supply chains, improving storage efficiencies and reducing traffic congestion. TfL has investigated the potential role and benefits of UCCs in the construction industry,[74] which could be applied to other customer sectors.

Land demand for logistics

5.7 Traditionally, demand for warehousing land was assessed in terms of the relationship between projected employment and employment density within the sector. However, research by URS[75] indicates that the demand for logistics land is poorly correlated with employment growth. Instead, overall economic growth measured in Gross Value Added (GVA) provides a better correlation with land demands for logistics. Using the London Plan's modest assumption that London's output will grow by at least the national trend (2.5% per annum) and taking into account the scope for some transfer of demand both within and outside London (see paragraph 5.13), there is projected additional demand for over 460 hectares of land for warehousing and logistics functions in London between 2006 and 2026.

Spatial distribution and logistics property market areas

5.8 Most of this additional demand is anticipated in the North East, South East and West sub-regions. An appropriate balance needs to be struck between making provision for logistics and warehousing development in inner London, outer London and the surrounding regions to help minimise increases in vehicle miles and carbon emissions and to promote alternative sustainable modes for logistics and reduce congestion.

5.9 The broad industrial land release benchmarks set out in the London Plan[76] and the sub-regional and borough qualitative guidelines in Sections 3 and 4 of this SPG take into account the need for this balance including the scope to accommodate some demand for logistics functions outside London's boundary. To fulfil economic and wider sustainability objectives, there is a need to retain some capacity for responsive 'just in time' logistics in proximity to the Central Activities Zone and Canary Wharf to

support the financial and business services sector and growth in other services, including culture, leisure, tourism and hospitality.

5.10 Research[77] has identified six principal property market areas (see diagram in Annex 5) for logistics in London including:

- Thames Gateway;
- Lea Valley;
- Park Royal/A40/M4/A4 corridors;
- Heathrow;
- Wandle Valley
- Central Services Circle.

5.11 The London Plan and SRDFs highlight the particular importance of making strategic provision for logistics north and south of the Thames in outer North East and South East London, and in West London especially to serve Heathrow. To ensure conformity with the London Plan, boroughs are advised to take account of the strategic logistics needs associated with these market areas and particularly those in outer West, North East and South East London.

5.12 SILs in these property market areas that may provide particular scope for logistics and opportunities for consolidation of loads include River Road, Barking Rippleside, Dagenham Dock/Havering Riverside and Belvedere in the Thames Gateway; Brimsdown, Blackhorse Road, Central Leaside and Fish Island in the Lea Valley; Park Royal in the north west of London; Hayes Industrial Area with a particular focus on Heathrow and the M4/A4 corridor; Purley Way in the Wandle Valley; and Surrey Canal Area, Bermondsey South East and parts of Nine Elms in the southern part of the Central Services Circle.

5.13 The extent to which demand is mobile within and between these property market areas varies between business sectors and organisational size. Time sensitive food and office support functions often seek to locate closer to the centre of London. The general retail and other industrial sub-sectors tend to consider locations in outer London and beyond the M25, particularly those serving a wider south east regional market. Balancing price and the availability of land and labour, suppliers are holding stocks further back in the supply chain and often outside London. Close cooperation with the South East and East of England regions to address the spatial distribution of logistics serving London and the wider metropolitan region is essential. As indicated in the EiP Panel Report on the draft Further Alterations to the London Plan[78], inter-regional

engagement should consider the scope for the substitution of some of the projected additional logistics capacity to locations outside London.

5.14 To respond to these dynamics, planning policy must take a positive approach to provision for logistics in the context of the overall objectives of the London Plan, the Economic Development and Transport Strategies and the London Freight Plan. Heavy traffic generators should be steered away from environmentally sensitive locations to those where their impacts can be minimized and opportunities for sustainable modes of distribution maximised, usually in PILs with easy access to the strategic road, rail, river and/or canal network. These locations, or parts of these locations, could be formally identified as Logistics Parks especially those in West London (particularly near Heathrow), and north and south of the Thames to the east, as indicated in paragraph 3.159 of the London Plan.

5.15 At a strategic level, the review of SILs through the SRDFs and the London Plan has provided an opportunity to coordinate logistics and warehousing provision to more effectively meet distribution needs across London. Where boroughs do seek to restrict the development of warehousing facilities within industrial areas they should provide reasoned justification for this restriction, particularly where these restrictions apply within PILs.

Movement of goods by rail and water

5.16 In line with sustainable transport policy set out in the London Plan, Transport Strategy and the London Freight Plan, boroughs are encouraged to promote facilities at locations that allow the movement of goods by rail or water. The London Plan and Government guidance urge waste planning authorities to consider the capacity of existing and potential transport infrastructure to support the sustainable movement of waste, and products arising from resource recovery, and to maximise the potential use of rail and water transport[79] (see also Section 6).

5.17 The London Rail Freight Strategy[80], a daughter document of the London Freight Plan, contains two companion documents, a Planning Policy Toolkit and a Development Control Toolkit[81] that will be of use to boroughs, developers, landowners and other stakeholders. The Planning Policy Toolkit accompanies the SPG 'Land for Transport Functions' and acts as a reference point for policy makers to support the protection of rail freight sites through the development plan process. The Development Control Toolkit provides practical development control guidance on the development of rail freight sites in London, acting as a guide for both rail freight site developers and local planning authorities. Similar guidance is being developed for water freight (see paragraph 5.21).

5.18 London Plan Policy 3C.26 and the Land for Transport Functions SPG note that three or four strategic rail freight interchanges within or near to the M25 would meet the required capacity for London and the South East area. These sites may or may not be within the GLA area.

5.19 TfL undertook an assessment of other potential rail freight sites in London that updates work undertaken by the Strategic Rail Authority (SRA) in 2004. TfL's assessment considered the demand for potential rail freight sectors in a given area, along with operational and potential planning policy issues. Further details can be found on TfL's Rail Freight Strategy website[82].

5.20 London Plan Policy 4C.8 supports new development and facilities that increase the use of the Blue Ribbon Network[83] to transport freight and general goods especially in areas of deficiency. A full review of safeguarded wharves in London has been undertaken[84] and Government confirmed directions in 2005. Annex 4 illustrates the close spatial relationship between the safeguarded wharves and the SILs, reflecting their complementary functions. This SPG supports the implementation of London Plan Policy 4C.9 to protect safeguarded wharves and associated land for cargo-handling uses, transhipment purposes and the transport of waste (see Section 6). The next strategic review of safeguarded wharves is anticipated to commence 2008/9. The GLA has also investigated the current status and operation of boatyards serving River Thames vessels in London[85] some of which lie in industrial locations. The research also considered how the needs of boatyards might change in future and what measures may be needed to ensure that the Thames can sustain a viable passenger and freight transport service.

5.21 Water freight, particularly for construction materials and waste can be more easily accommodated than rail freight. TfL are developing a Planning Policy and Development Control Toolkit for water freight to act as a reference point for policy makers in supporting the protection of sites through the development plan process and a practical development control guidance on water freight site development in London, acting as a guide for both waterside developers and local planning authorities.

5.22 The London Lorry Control Scheme restricts heavy goods vehicle movements during evenings and weekends on selected road networks to minimise the impact of freight traffic on London's residents. Following the publication of the revisions to the Mayor's Transport and Air Quality Strategies[86], virtually the whole of Greater London became a Low Emission Zone (LEZ) in February 2008. Within the LEZ the most polluting diesel engine trucks, buses, coaches, large vans and minibuses will be required to meet specified Euro emissions targets or pay a charge[87]. One

of the intended outcomes is that the scheme will reduce carbon emissions and promote increased use of less polluting vehicles and more sustainable modes of logistics including rail and water.

SPG 5 – Logistics and warehousing

In implementing London Plan policies the Mayor will and boroughs, the LDA, TfL and other partners are asked to:

(i) take particular account of the need for logistics provision in the market areas outlined in paragraph 5.10 and especially in outer North East, South East and West London;

(ii) encourage logistics and distribution facilities which will promote the movement of goods including waste and aggregates by rail or water;

(iii) ensure that provision is made for large scale distribution activities in the light of local and strategic assessments of demand, particularly in environmentally acceptable Preferred Industrial Locations with good access to the strategic road network, existing and potential inter-modal rail freight, river and/or canal related facilities including wharves, and generally resist it elsewhere;

(iv) accommodate smaller scale logistics, warehouse and storage facilities within SILs and LSIS in line with strategic road capacity. Provision on industrial sites outside the SILs should not compromise the local environment, access or road capacity or broader concerns to secure intensification at appropriate locations;

(v) explore the potential for rail freight interchanges and more general logistics provision in conjunction with authorities in the wider South East and East of England regions;

(vi) consider whether all or parts of SILs and LSIS, where there are existing or potential opportunities for sustainable modes of distribution, be formally promoted as Logistics Parks as suggested in paragraph 3.159 of London Plan.

6 Waste management and recycling

6.1 The imperative to manage London's waste more sustainably and for communities to take more responsibility for their own waste is set out in the Mayor's Waste Strategy[88] and the London Plan. In Policy 4A.21, the London Plan sets challenging targets to ensure that there are sufficient facilities to manage 85 per cent (20.6 million tonnes) of waste arising within London by 2020. This policy also sets targets to exceed recycling or composting levels in municipal waste of 45 per cent by 2015, and to achieve recycling, composting and re-use rates of 70 per cent by 2020 for commercial and industrial waste, and a rate of 95 per cent by 2020 for construction, excavation and demolition waste[89].

6.2 Government policy in PPS10 states that when searching for sites and areas suitable for new or enhanced waste management facilities, waste planning authorities should consider opportunities for on-site management of waste where it arises and a broad range of locations including industrial sites, looking for opportunities to co-locate facilities including complementary activities[90].

6.3 Policy 3B.4 in the London Plan emphasises the need to make strategic and local provision for waste management on industrial sites. Such a distribution reflects the already strong correlation between waste recycling and recovery facilities and allocated industrial land in London[91]. Policy 4A.27 of the London Plan identifies broad locations suitable for recycling and waste treatment facilities including SILs (both Preferred Industrial Locations and Industrial Business Parks), local employment areas (including Locally Significant Industrial Sites) and existing waste management sites. Policies 4A.22 and 4A.23 set out the spatial policies for waste management and criteria for the selection of sites, including proximity to the source of waste, the nature and scale of the activity proposed, the environmental impact on surrounding areas, the full transport impact of all movements maximizing the potential use of rail and water transport and a preference to use sites in PIL and existing waste management locations.

Estimated land requirements for waste treatment facilities

6.4 The additional land requirement for waste management purposes in London over the period 2005-2020 is estimated to be 328 hectares. The re-use of surplus waste transfer capacity is anticipated to deliver some 113 hectares towards this requirement. This means that between 2005 and 2020 there will still be demand for some 215 hectares of additional land capacity not currently in waste use[92]. The majority of this provision is expected to come from sites in industrial use.

6.5 PPS10 requires the Mayor through the London Plan to identify the tonnages of municipal and commercial/industrial waste requiring management, and to apportion them by waste planning authority area[93]. The GLA commissioned consultants to develop a waste apportionment methodology[94] in collaboration with the Government Office, London Councils and the waste planning authorities and the work informed the borough level waste apportionment in the London Plan[95].

6.6 The consultant's waste apportionment model contained a range of inputs including the potential capacity of industrial land to accommodate new waste facilities[96]. Potential capacity was based upon occupied and vacant industrial land in 2006[97] with an allowance made for take up for new industrial occupiers (see paragraph 3.6) and the indicative quantum of land in industrial use to be released to housing over the period 2006-2020[98].

6.7 To meet their waste apportionment targets, waste planning authorities should achieve the maximum possible degree of self-sufficiency and enable waste to be managed in one of the nearest appropriate installations. Based on the most recent borough waste apportionment outputs[99], indicative estimates of the likely future land requirement for new waste facilities in each borough 2006-2021 are set out in Annex 6 of this SPG. The actual land requirement in any given borough will inevitably depend on a number of factors including, not least, the number, type, scale and location of waste treatment and recycling facilities selected to manage the apportionment in collaboration with neighbouring boroughs where appropriate.

A proactive approach to accommodate new facilities

6.8 Boroughs should assess how they will accommodate new waste management facilities. These assessments should cover local quantitative and qualitative appraisals of vacant and occupied industrial land. A proactive approach may be required, particularly in boroughs with low levels of vacant land. This may include facilitating the redevelopment and intensification of use of existing occupied industrial land for waste management purposes. Boroughs and other stakeholders including the LDA may need to consider the scope to purchase sites currently in other employment uses where there is a viable prospect of delivering a facility for waste management and recycling use in the future.

6.9 Design can play a key role in determining appropriate locations for new facilities and their compatibility with neighbouring land uses. Policy 4A.23 of the London Plan indicates that certain types of facility might be most appropriately located in PILs or on existing waste management sites. Nevertheless, evidence from best practice[100] suggest that certain types and scale of facilities can co-exist with other land uses, including in some

circumstances, residential (such as at Lough Road in Islington). This is recognised in London Plan Policy 4A.27 which indicates a broader range of potential locations in addition to PIL for new waste management facilities.

6.10 The Waste Electronic and Electrical Equipment (WEEE) Directive[101] came into force in 2007 and requires the recovery of different categories of waste electrical equipment. This is one of the fastest growing waste streams in London and the UK. It can however be a relatively clean activity carried out increasingly under cover with stringent controls and is not necessarily a 'bad neighbour'.

6.11 The GLA's waste team are leading a project in conjunction with Design for London that aims to explore opportunities for co-location of waste treatment facilities with other forms of development. DEFRA is in the process of preparing a design guide for new waste infrastructure which is expected to provide practical examples of best practice in planning, procurement and design. Section 9 of this SPG provides further guidance on design challenges for industry.

SPG 6 – Waste management and recycling

In implementing London Plan policies, the Mayor will and the LDA, TfL, boroughs and others partners are asked to:

(i) take into account the need to accommodate additional waste management and recycling facilities in assessments of supply and demand for industrial land and make sufficient provision in DPDs to meet the waste apportionment targets set out in the London Plan;

(ii) have regard to the indicative land requirements for additional waste management and recycling facilities 2006-2021 set out in Annex 6;

(iii) take a proactive approach to accommodate additional waste management and recycling facilities, make efficient use of available sites and facilitate the redevelopment and intensification of existing occupied industrial land for waste management purposes;

(iv) consider existing and emerging best practice in the design of new waste management facilities (see paragraphs 6.9 to 6.11) and explore opportunities for co-location of waste treatment facilities with other forms of development;

(v) take account of the capacity of existing and potential transport infrastructure to support the sustainable movement of waste, and products arising from resource recovery, and to use modes other than road transport when practicable.

7 Transport, utilities and wholesale markets

7.1 London Plan Policy 3B.4 and paragraphs 2.39 and 3.158-160 point to the need for strategic and local provision for other potential users of industrial land including transport facilities, utilities and wholesale markets.

Transport

7.2 The need to provide sufficient appropriately located capacity for the development of London's transport functions is set out in London Plan Policy 3C.4. The Mayor's Land for Transport Functions SPG provides guidance on land requirements for a range of passenger and freight transport uses. Some of these additional land demands for transport functions will be linked to specific projects, such as Crossrail, and safeguarding of land is often dealt with on an individual project basis. Some transport functions do however take place on industrial land (see definition of industrial land in paragraph 1.8) and typically these include some rail freight terminals and interchanges (see Section 5) and bus garages.

7.3 The Mayor's Transport Strategy aims for an increase of 40 per cent in bus capacity by 2011. Between 2000/1 and 2005/6 bus mileage increased by 27 per cent and patronage increased by 34 per cent[102]. The Land for Transport Functions SPG notes that although there is scope for more intensive use of existing bus garages, there will be demand for an estimated 12 additional sites within London by 2016. Assuming that a typical bus garage has an average land requirement of about one hectare, consultants for the GLA[103] estimated that the additional land requirement would be in the region of 12 hectares and provided the broad sub-regional distribution of these (see column 11, Annex 2).

Utilities

7.4 The growth in London's population and employment places demands on utilities infrastructure and resources (see London Plan Policies 4A.4-8 and 16-18). Some of this infrastructure lies within allocated industrial land particularly large electricity sub-stations, water supply and sewage treatment works. The Mayor's Energy Strategy[104] sets out principles to use less energy, supply energy efficiently and use renewable energy (see Section 9).

7.5 In responding to demand, research[105] suggests that utility providers are generally expected to renew and increase capacity of existing sites, including the co-location of facilities, rather than require new sites on industrial land. There may however be some exceptions, particularly where there is significant planned residential development for example in the Thames Gateway[106]. For water resources in London, the need for new facilities has been considered by the GLA in the Mayor's draft Water Strategy[107].

Wholesale markets

7.6 London's five wholesale markets at New Covent Garden, New Spitalfields, Western International, Smithfield and Billingsgate occupy a combined total of 50 hectares of industrial land. They have experienced changes to their historic roles. Demand for wholesaling capacity has been reduced by competition from efficient distribution systems and supermarkets. This has, however, partly been offset by new demand associated with the increase of eating out, consumption of 'whole-foods' and the specific dietary requirements of London's Black, Asian and minority ethnic (BAME) communities.

7.7 The London Plan sets out the Mayor's strategic objectives to ensure that London has an efficient, modern wholesale market function to meet its changing requirements[108]. The London Plan makes clear that redevelopment of any of London's five wholesale markets should not compromise long term opportunities to consolidate composite (meat, fish and vegetables) market functions at Western International, New Covent Garden Market and New Spitalfields.

7.8 Following a commitment in the Mayor's 2004 London Plan an independent review of wholesale markets was commissioned[109]. This was complemented by a TfL freight study in recognition of the contribution of wholesaling to a more sustainable transport system, and coordinated with the on-going appraisal for a London Sustainable Food Hub as part of the Mayor's Food Strategy[110].

7.9 The Wholesale Markets Review tested the scale and nature of likely future demand and the optimum distribution of wholesaling capacity in terms of overall London Plan objectives. It assessed these options against a range of factors including strategic and local objectives. Based upon this appraisal, the review provided recommendations to secure an efficient food wholesaling function; ensure sites are used effectively and contribute to strategic objectives; and deliver a sustainable approach to related transport logistics.

7.10 Overall, the review anticipated that consolidation of London's wholesale markets might release in the order of 8 hectares of industrial land to other uses. This outcome is integrated with the strategic assessment of demand and supply of industrial land (see Section 3) and incorporated into the London Industrial Land Release Benchmarks presented in Table 1, Section 3 and Annex 2.

7.11 The wholesale markets sector also has the potential to make more efficient use of scarce land resources and to contribute to the Mayor's

other broader objectives for different parts of London. The Mayor's proposed consolidation of part of the SIL at Nine Elms in the London Plan[111] will provide scope for the intensification and redevelopment of New Covent Garden Market and will contribute to the wider objectives of the CAZ and the Vauxhall Nine Elms Battersea Opportunity Area. This is being progressed through an Opportunity Area Planning Framework. The Mayor will work with partners to explore scope for consolidation of Smithfield and Billingsgate and for expansion of capacity at New Spitalfields. He has already supported consolidation and modernisation of Western International.

SPG 7 – Transport, utilities and wholesale markets

In implementing London Plan policies, the Mayor will and the LDA, TfL, boroughs and others partners are asked to:

(i) make adequate provision of land for transport functions in DPDs, including where appropriate on industrial land, in response in particular to the demand for additional bus garages and for rail freight facilities;

(ii) take into account land requirements for new utility infrastructure and particularly in the Thames Gateway, London-Stansted-Peterborough-Cambridge growth area, the Opportunity Areas, Areas for Intensification and other locations where growth in new homes and jobs is anticipated;

(iii) ensure that London has an efficient, modern wholesale market function to meet its changing requirements including the needs of Black, Asian and minority ethnic (BAME) communities, the restaurant sector and demand for 'whole-foods';

(iv) ensure that redevelopment of any of London's five wholesale markets does not compromise long term opportunities to consolidate composite (meat, fish and vegetables) market functions at Western International, New Covent Garden Market and New Spitalfields.

8 Industrial capacity and mixed-use development

Policy context

8.1 In Policy 4B.1 the London Plan set out design principles for London including maximising the potential of sites and providing for, or enhancing, a mix of uses. Policy 3B.4 states that in planning for industrial land, boroughs should also have regard to the potential for surplus industrial land (as defined in assessments) to help meet strategic and local requirements for a mix of other uses such as housing and social infrastructure and, where appropriate, contribute to town centre renewal.

8.2 London Plan policy underlines that the prime purpose of SILs and LSISs is to ensure an adequate stock of industrial capacity. Redevelopment for higher density, mixed uses through the consolidation of a SIL or LSIS must not compromise their offer as the main strategic and local reservoirs of industrial capacity. Inappropriate redevelopment of even parts of industrial sites can compromise the offer of wider areas as competitive locations for industry, logistics, transport, utilities or waste management. This is particularly important in areas where industrial capacity is in short supply (see paragraph 3.9).

8.3 The potential for mixed-use intensification should only be considered where it supports the above policy objectives and the plan's broader objective to encourage better use of land. Adopting these principles, properly coordinated through assessments of demand and supply, planning frameworks and DPDs, mixed-use intensification can deliver more homes, a better urban environment and improve the quality of industrial capacity.

Approaches to mixed-use development

8.4 Despite moves towards 'cleaner' industry, geographical separation of uses will still be required by many of London's industrial enterprises if they are to remain competitive. Many do not need and cannot afford a high quality environment and would not benefit from being mixed with other activities. Lower density, single use areas with good 24-hour vehicle access offer these activities the greatest scope for viability in London. Preferred Industrial Locations and some appropriately located sites outside the SIL framework will continue to provide the most sustainable home for such activities.

8.5 The external, environmental costs of other types of industrial activities, including some creative and cultural industries (see the Mayor's Culture Strategy[112]) and some waste management uses, can be less onerous on potential neighbours. With careful design and branding of sites backed by clear planning briefs and agreements, provision for these firms can offer

greater scope for more intensive forms of development with a mix of industrial and non-industrial uses.

8.6 In the context of the strategic London-wide study[113], local assessments of industrial land demand and supply should identify surplus industrial land, after taking into account the need to accommodate logistics, waste management, utilities and transport functions. In drafting policies and site specific proposals in DPDs, boroughs are encouraged to consider the potential for surplus industrial land to provide a mix of other uses such as housing and, where appropriate, provide social infrastructure and contribute to town centre renewal.

8.7 It is anticipated that most industrial land identified as surplus for release to other uses will come from smaller sites outside SILs and LSISs. However, where consolidation of SILs is considered appropriate in the light of assessments, the release of land for mixed-use development should be coordinated through mechanisms including, where appropriate, Opportunity Area Planning Frameworks (see paragraphs 3.29-3.31) and more formally through the DPD process. Complementary, sensitive relocation arrangements are likely to be necessary to avoid loss of industrial employment of different types through the redevelopment process.

8.8 Though the higher environmental quality of Industrial Business Parks would seem to make them inherently more suitable for such development, there may be scope to redevelop and upgrade parts of some Preferred Industrial Locations in appropriate locations. Mixed-use consolidation should be focussed on the periphery of SILs near to public transport nodes or town centres, especially where there is a barrier separating the area from the rest of the SIL. These could enable consolidation of more environmentally sensitive, existing PIL tenants while maintaining the integrity of a local business cluster.

8.9 Good public transport access is an essential pre-requisite for intensification and mixed-use redevelopment. TfL can advise on existing and future public transport accessibility of different locations, including PTAL scores. Those locations where such developments can be closely integrated with a wider mix of surrounding uses, such as on the edge of town centres will be particularly appropriate. While vehicular access will still be needed, this does not have to be as intrusive or exclusive as that associated with more traditional types of industry. Those activities that place a higher premium on added value rather than volume are particularly likely to fall into this category. Those with higher employment densities may obtain greater benefit from better public transport provision, which itself can only be viable in higher density areas.

Resolving design challenges in mixed-use redevelopments

8.10 The London Plan and Government advice, supported by research[114] promote development with an appropriate mix of uses and integrated through high quality and inclusive design. In most mixed-use industrial redevelopments the industrial uses will be integrated with but physically separate from sensitive non-industrial uses such as housing. However, in some cases, mixed-use buildings can function successfully where lighter industrial uses compatible with housing in terms of noise, light, air quality and transport movements, occupy the ground floors, with residential uses above. Careful design of access arrangements and selection of materials are essential to ensure that the mix of uses is able to co-exist without bad neighbour issues or conditions on hours of operation being imposed on users.

8.11 The Industry in the City study[115] prepared for the LDA's Design for London team sets out innovative approaches to intensification and mixing of industrial and other uses. 'An Investors Guide to Brownfield Land'[116] produced by the LDA in collaboration with London First and Think London, provides a basic overview of the process for developing brownfield land in London, comprised principally of vacant and under-utilised industrial land.

8.12 Housing, including affordable housing, will be the key other priority on permissible mixed-use redevelopments. Leisure, retail, social infrastructure and other town centre uses will also be appropriate if the mixed-use development can be integrated with broader proposals for town centre renewal. However, other than to provide small scale, local convenience services, retail and leisure uses will not be appropriate outside town centres. Provision should be made to improve access to small scale, 'walk to' amenities and services including crèches, which serve the needs of people working within industrial areas (see paragraph 9.23). Such provision is likely to be particularly important in SIL and LSIS.

8.13 Where land is released for housing or mixed-use development it must fulfil stringent design criteria for sustainable buildings, a complementary mix of activities and a safe, attractive environment for all uses including access to services, facilities and open space including children's play space[117]. Some former industrial buildings and structures make a valuable contribution to local character and distinctiveness, which should be taken into account in proposals for mixed-use redevelopment (see London Plan Policies 4B.1, 8, 11-15). Issues relating to light, air quality and ambient noise should also be addressed in mixed-use developments (see London Plan Policies 4A.3, 4A.19 and 4A.20 respectively, and further guidance in Mayoral Strategies[118]).

8.14 Policies relating to the location of establishments where hazardous substances are used or stored and the development of land within the vicinity of establishments where hazardous substances are present are set out in London Plan Policy 4A.34. Such establishments are typically located within industrial areas in London. The Health and Safety Executive (HSE) has recently introduced changes to the manner and method by which it provides advice to local planning authorities on planning applications that are located in close proximity to hazardous installations. The Mayor has commissioned a detailed report to examine the effects of these changes on London[119].

SPG 8 – Industrial Capacity and Mixed-Use Development

In implementing London Plan Policies 2A.10 and 3B.4, the Mayor will and the LDA, TfL, boroughs and others partners are asked to:

(i) consider through strategic and local demand and supply assessments and DPDs whether industrial areas that have, or will have, good public transport accessibility, especially those within or on the edge of town centres, would be appropriate for higher density, mixed-use redevelopment. This redevelopment should not incur a significant net loss of industrial capacity or compromise the offer of wider areas as competitive locations for industry, logistics, transport, utilities or waste management. Where this affects SILs this consolidation should be managed sensitively having regard to the process set out in SPG1;

(ii) focus consolidation through this process on the periphery of SILs near to public transport nodes or town centres, especially where there is a barrier separating the area from the rest of the SIL and enable consolidation of more environmentally sensitive, existing PIL tenants while maintaining the integrity of a local business cluster;

(iii) establish robust and sensitive industrial relocation arrangements to support redevelopment where necessary;

(iv) where necessary, improve the provision of small scale, 'walk to' amenities and services including crèches, which serve the needs of people working within industrial areas.

9 Quality of Industrial Capacity

9.1 The quality and fitness for purpose of industrial sites is an important concern in Policy 3B.4 of the London Plan. Qualitative improvements in industrial locations can also contribute towards the wider objectives of the London Plan to make London an exemplary city in terms of mitigating and adapting to climate change and urban design, public realm and architecture. The effective management of industrial capacity can also play a key role in promoting social inclusion, access to employment and regeneration.

Mitigating and adapting to climate change

9.2 The London Plan sets out the imperative to use energy and resources more efficiently and to mitigate the effects of, and adapt to climate change[120]. The Mayor has published a Climate Change Action Plan[121] to support this objective.

9.3 The spatial distribution and quality of industrial capacity can in many ways contribute towards mitigation and adaptation to climate change. The London Plan stresses that new developments should achieve higher environmental standards, promote energy efficiency and decentralised energy supply and achieve a reduction in carbon dioxide emissions of 20% from onsite renewable energy generation (which can include sources of decentralised energy) unless it can be demonstrated that such provision is not feasible[122]. At a broader level, this will include increasing the roll-out of combined cooling, heat and power energy supply and developing mechanisms to produce energy from waste (without incineration)[123]. Overheating is a critical issue for warehouses, especially in the food and pharmaceutical industries, with lighting, operating equipment and mezzanines all contributing to higher internal temperatures. Evidence in practice[124] indicates that evaporative air-cooling is cheaper to operate and consumes less than a quarter of the energy compared to more traditional refrigerant based air-conditioning systems.

9.4 New industrial development and refurbishments should, in accordance with London Plan Policy 4A.3, ensure that they meet the highest standards of sustainable design and construction, and the Mayor's SPG on this subject provides an essential context for all developments and refurbishments. Forming part of a Green Organisations Programme, the Better Buildings Partnership[125] is working with and incentivising commercial landlords to upgrade their buildings, particularly through routine refurbishments.

9.5 The location of industrial development can help to reduce the need to travel by private vehicles where it can be supported by integrated public transport access for staff and customers. Measures to promote safe, accessible, attractive access by walking or cycling should be essential

components of new industrial development and bring qualitative improvements to the permeability of existing industrial areas. Consolidation centres for logistics, particularly at rail, river and canal connected sites, can also contribute to sustainability objectives, and the implementation of travel plans for staff and Delivery and Servicing Plans for goods can help minimise the impact of distribution activities. The London Plan promotes the use of low emissions vehicles, including those powered by hydrogen and fuel cell,[126] where logistics and waste management operations have potentially a substantial contribution to make.

9.6 The risk of flooding, particularly in the context of climate change, is a major issue for London. Approximately 26 per cent of London's industrial land lies within Zones 2 and 3 of the Environment Agency's Flood Map. In the context of London Plan Policies 4A.12/13 and Government policy in PPS25, boroughs and other stakeholders in London are asked to have regard to the draft Regional Flood Risk Appraisal for the London Plan[127], which examines the nature and implication of flood risk in the capital and how the risk should be managed. At the micro level, industrial and warehousing developments often contain large areas of hard standing and roof areas and are well placed to make significant contributions to sustainable drainage (London Plan Policy 4A.14). Permeable surfaces on areas of hard standing, such as parking areas for example, can assist in the management of surface water run-off. Practical examples of warehouses with a grass roof designed to harvest rainwater are emerging[128]. The Mayor's draft Water Strategy[129] and Sustainable Design and Construction SPG provide further advice on these matters.

Improving quality in industrial locations

9.7 The poor quality of sites allocated for industrial development is a major concern in many parts of London. Some vacant industrial land in London is unavailable for development because of various forms of constraint, or because it is unsuitable for modern industrial purposes. Other vacant or underused land may be held back from productive use by landowners holding out for a realisation of 'hope value' (see paragraphs 3.29 and 4.5).

9.8 Improving the quality of industrial sites will require integrated planning, regeneration and transport actions, with cooperation between boroughs, the GLA group and other partners including the sub-regional partnerships and the police. Coordinating the investigation and, where appropriate, the remediation of sites will reduce costs and timescales, promote sustainable design and construction, reduce waste generation and increase the attractiveness of investment. The LDA has continued to prepare and market its land holdings and involve itself in strategic sites across London. Despite challenges such as low land values and limited accessibility, the

LDA has scored significant and ongoing success investing in sites and achieving sustainable development. Examples include the Environmental Technology Business Park at Dagenham Dock, which continues to be developed out, and the White Hart Triangle in Greenwich with Phases 1 and 2 complete and amounting to 10.9 hectares of previously derelict and contaminated land.

9.9 The short term geographical priority for action is set out in the LDA's Corporate Plan. Priorities for 2006–2009 focus on the Thames Gateway (Lower Lea, London Riverside, Greenwich/Bexley areas) in collaboration with Thames Gateway London Partnership (TGLP) and the London Thames Gateway Development Corporation (LTGDC). The LDA also has continuing area programmes in King's Cross/Finsbury Park; City Fringe; London South Central; Southall/Hayes; Upper Lea Valley (including Tottenham); Wembley, Park Royal and White City; and other areas for strategic intervention including City East (including the Royal Docks), Lewisham and Crystal Palace.

9.10 The LDA has a broader remit to address the needs of industry through its business-led Production Industries Panel. In addition it will target the needs of life science, environmental, ICT and 'emerging' sub-sectors. The Agency will also seek to acquire sites, using compulsory purchase powers if necessary, which it considers are key to delivery of its programmes and priorities.

9.11 With some notable exceptions, industrial development has been little affected by wider objectives to enhance the quality of the urban environment. While development costs must be a concern for industries which find London to be only a marginally competitive business location, good design does not have to incur these, especially if it is incorporated from the outset of the development process. Design for London, with a focus on the Mayor's spatial priority areas including the Opportunity Areas, Areas for Intensification and CAZ, may have some capacity to advise on this. Design factors that could usefully be taken into account in this process include:

(i) climate change adaptation and mitigation measures, including energy efficiency, renewable energy and flood resilient building design (see paragraphs 9.2 to 9.6). Buildings should be designed to be suitable for the changing climate throughout their projected lifetime;

(ii) sustainable design and construction - applications for major developments will be required to provide a sustainable design and

construction statement, including an energy assessment as part of this (see London Plan Policies 4A.3 and 4A.4). Further guidance on adaptation and mitigation measures is provided in the Sustainable Design and Construction SPG[130];

(iii) intensification – making more efficient use of land wherever feasible taking into account operational requirements (such as vehicle turning circles). Maximise site attractiveness and uplifts in land values generated by proximity to public transport infrastructure through higher density, higher quality redevelopment;

(iv) access – maximising use of sustainable transport modes for distribution of goods including by rail, river and canal; and enhancing permeability and access by public transport, cycling and walking for staff and visitors;

(v) inclusive design[131] – industrial locations, buildings and facilities should be usable safely, easily and with dignity by all regardless of disability, age, gender, ethnicity or financial circumstances;

(vi) designing out crime – drawing on police design advice to address lighting, circulation and security issues;

(vii) landscaping – traditionally not a significant concern in industrial development but modest investment can have a major impact on enhancing security, the environment and biodiversity (see Mayor's Biodiversity Strategy[132]). Green roofs and Sustainable Urban Drainage systems can also contribute towards flood resilient design;

(viii) materials – imaginative use of new industrial cladding materials (including green roofs) can have significant and cost effective environmental and climate change benefits;

(ix) site layout – buildings should be integrated into their context. Orientation and layout of buildings can also have significant bearing on climate change adaptation, mitigation and flood risk management;

(x) surroundings - design should respect local context, history and character, and complement surrounding uses, taking into account noise, light and air quality impacts;

(xi) settings - maximising site attractiveness and uplifts in land values generated by nearby, higher value or more attractive uses/ surroundings through redevelopment;

(xii) operational processes – need to take into account resource use, emergency plans and waste management issues at the outset of the design process.

9.12 In improving the quality of industrial provision, account should also be taken of the needs of firms that make important contributions to the London economy but which have negative environmental impacts. Boroughs are encouraged to ensure that there is adequate capacity for 'bad neighbour' industrial uses in locations where they will not detract from the environment of other activities. These will usually be in PILs. Many of the difficulties that such industries have traditionally caused can be avoided through careful design of facilities and their relationship with surrounding areas. Notwithstanding the above, although firms in PILs do not necessarily place a high premium on environmental quality, this does not remove the need for action to improve the quality of these locations.

9.13 The London Plan and the Transport Strategy address quality issues including parking and other transport needs of industrial enterprises within the context of those of London as a whole. This includes working towards implementation of a coordinated 'level playing field' for parking provision with local authorities adjacent to London.

9.14 To implement London Plan Policy 3B.4, boroughs are encouraged through their detailed local assessments of supply and demand to consider qualitative as well as quantitative factors and to retain in industrial use both higher quality industrial sites and those that meet a demonstrable need for low cost accommodation.

Innovative approaches to intensification

9.15 Qualitative improvements to industrial locations can come about through the intensification of industrial uses and, where appropriate, the mixing with other non-industrial uses (Section 8).

9.16 Examples of intensification in industrial and warehousing developments are emerging and include the development of a two-storey warehouse by Brixton Estates at Hatton Cross with full HGV access to the upper floors. Similar examples exist in Japan and Hong Kong. In the logistics sector, intensification can also be achieved through high eaves heights and the incorporation of mezzanines. Intensification of industrial uses may also

provide scope to deliver other industrial related uses such as waste management and recycling (see Section 6).

9.17 Innovative approaches may be needed to improve industrial areas and meet the varied needs of key sub-sectors as well as new forms of production and working. A pro-active approach to enabling development through planning agreements both within and outside the SIL framework is likely to be important. The London Plan provides the strategic context for planning agreements in London (Policies 6A.4 and 6A.5).

9.18 Depending on the circumstances of individual developments, planning agreements may be used to secure affordable workspace as well as adequate e-infrastructure (see London Plan Policies 3B.6, and 7), transport provision including 'car clubs', contributions towards site assembly and de-contamination and provision for those emerging industries highlighted in the London Plan[133] and the Economic Development and Culture Strategies. Planning agreements may also be necessary to secure relocation arrangements and a balance of uses in mixed-use developments (Section 8) and the consolidation processes indicated in SPG1 and paragraphs 3.29 to 3.31.

Promoting social inclusion, access to employment and regeneration

9.19 Against a backdrop of declining employment in traditional manufacturing industries (see paragraphs 2.1 to 2.2), there is modest projected growth in most other industrial related sectors, and in particular logistics, environmental industries and waste management. Some enterprises in the creative and food-related sectors also find industrial land a competitive location. A selection of construction-related activities also typically take place on industrial land[134] and although projected to decline in employment terms 2006-2026, will be of increasing strategic importance in the build-up to the 2012 Olympic and Paralympic Games[135] and beyond.

9.20 Ensuring that Londoners are able to access these and other employment opportunities is a key concern of the London Plan (Policy 3B.11) and is essential to tackle social exclusion and deliver benefits to areas in need of regeneration (Policy 2A.7). It is also critical for London's competitiveness that enterprises are able to draw on an adequate supply of labour with appropriate skills.

9.21 The LDA Regional Skills Partnership Programme and associated action plan[136] sets an overall strategy for investment to ensure that the business and skills challenges facing the capital can be met. The draft London Employment and Skills Strategy is anticipated for publication in spring 2008. The London Skills Commission members are jointly committed to

targeting resources towards the key strategic priorities that address the aims of increasing inclusion and maximising productivity. The 2006-08 programme is investing in London's existing and future workforce. It focuses on key employment sectors for London that, aside from the main growth sector in finance and business services, include construction, the green sector and the waste management and recycling sectors. The programme also provides specific ICT support for SMEs (see Section 10).

9.22 The London Employment and Skills Taskforce for 2012 has published an action plan[137] to maximise the employment and skills benefits of the 2012 Olympic and Paralympic Games. The action plan contains a range of measures to link people, work and training more effectively and in the industrial-related sectors includes training in construction and skills for logistics.

9.23 The London Plan and the Economic Development Strategy (EDS) address the needs and relationship between SMEs and Black, Asian and Minority Ethnic enterprises, women's enterprises, disabled entrepreneurs and local community enterprises and promote assistance through business support, training, innovation and regeneration initiatives[138]. Many women are restricted in accessing jobs due to the lack of affordable childcare,[139] particularly those in lone parent families. Alongside other measures, developments in industrial locations can contribute to removing this barrier to employment by providing adequate and affordable childcare facilities. This may be facilitated through intensification or mixed-use redevelopment proposals (see Section 8). Planning agreements may be used to secure learning, skills and training opportunities and childcare provision.

9.24 Over two-fifths of London's stock of Previously Developed Land (PDL) is located within Areas for Regeneration (among the 20 per cent most deprived areas at ward level defined by the London Index of Deprivation)[140]. PDL, much of which is comprised of vacant and under-utilised industrial land, is therefore well placed to regenerate London's deprived neighbourhoods. Many of London's SILs also lie within broad regeneration and growth areas including the Thames Gateway, the Lea Valley (part of the London-Stansted-Cambridge-Peterborough growth area), the Wandle Valley, the Western Wedge and the London-Luton-Bedford corridor. Although the main strategic sources of employment opportunities in these corridors are in the business services and other (leisure and retail related) employment sectors focused on the Opportunity Areas and town centres, there will be locally significant sources of employment within the SILs, LSIS and smaller industrial sites.

9.25 This SPG supports improved access to these employment opportunities including targeting appropriate skills to those industrial sub-sectors anticipated to grow (including environmental and creative industries), improving public transport access to industrial locations and promoting inclusive design principles within them. The SPG also supports a structured and managed approach to the transfer of surplus industrial land to other uses to contribute to wider regeneration initiatives and the delivery of a range of housing types, including affordable housing, and social infrastructure.

SPG 9 – Quality of Industrial Capacity

In implementing London Plan policies, the Mayor will and boroughs, the LDA, TfL and other partners are asked to:

(i) ensure that development of land in, and provision and refurbishing of premises for, industrial and related uses contribute to strategic climate change mitigation and adaptation objectives;

(ii) encourage the redevelopment of London's industrial areas to enhance their offer as competitive locations attractive to modern industry;

(iii) seek imaginative, sensitive design and investment solutions which do not entail a net loss of industrial capacity, which make more efficient use of space and enhance the environment within and around industrial areas;

(iv) consider how planning agreements might be used in light of local circumstances to secure London Plan objectives, including premises for different types of industrial occupier, transport, training, e-related and other infrastructure, contributions towards site assembly and decontamination and meeting the needs of specialist industries;

(v) make provision for demand for 'bad neighbour' industrial uses in environmentally acceptable locations, normally within PILs, and through good design ensure that they do not compromise the viability of other activities or the regeneration potential of the wider area;

(vi) promote access to employment and target skills investment taking into account the LDA's emerging Employment and Skills Strategy.

10 Variety of industrial capacity and provision for small and medium sized industrial enterprises

Variety of industrial capacity

10.1 The need to provide a range of workspaces of different types, sizes and costs to meet the requirements of different sectors of the economy is recognised in the London Plan (Policy 3B.1). Analysis of London's industrial property markets[141] indicates current strong demand for premises above 10,000 sq.m in the Thames Gateway, Lea Valley and locations in close proximity to Heathrow. For premises between 2,000 sq.m and 10,000 sq.m demand is strong across all of London's property market areas (illustrated in Annex 5) including the Central Services Circle whilst for smaller premises below 2,000 sq.m demand is evident in most locations but strongest in Park Royal, Heathrow and the Wandle Valley.

10.2 Capacity for industrial use includes the mainstream property market, managed workspace, railway arches[142], innovation centres, science parks, incubators and start-up space. Adequate provision of a range of these types of space is particularly important for the entry, survival and expansion of SMEs (see paragraphs 10.6 to 10.9).

10.3 The demand for warehousing land and premises for logistics is also complex. Three broad categories have been identified in research[143]. Warehouses (including general storage space); Distribution Centres (variable in size and requirements but generally characterised by larger yard spaces to accommodate more transport movements, and more assembly and packaging than traditional warehouses); and Large Scale Distribution Centres (often with sophisticated loading, storage and cross docking facilities).

10.4 The demand for new waste management facilities is similarly varied, both in type and scale. The average throughput and land take of different types of waste management facility is indicated in Table 4A.7 in the London Plan. The London Plan supports the objective to manage waste in one of the nearest appropriate installations to where it arises, which gives support to smaller, more local provision. This will need to be balanced with overall land requirement for waste facilities as in general, the smaller the site size the greater the overall land take for London as a whole.

10.5 In their local assessments of demand for industrial use, boroughs are encouraged to take into account these market sensitivities and anticipated space requirements, both land and floorspace, of existing and potential new industrial occupiers including provision to accommodate sectors where demand is anticipated to grow including logistics, waste management, utilities and transport functions.

Provision for small and medium sized industrial enterprises

10.6 The London Plan and Economic Development Strategy recognise that most industrial firms in London are small and many may suffer from inadequate or inappropriate accommodation. To implement London Plan Policies 3B.1 and 3B.4, this SPG seeks to protect viable industrial sites that can accommodate small industrial units suitable for start-ups and for small and medium sized enterprises (SMEs)[144] including those self-employed in the industrial, creative and related sectors.

10.7 SMEs provide important local services often as part of supply chains supporting higher order activities and they can gain a competitive advantage from a London location. The EDS notes that pension funds and other large property investors have traditionally been reluctant to invest in certain types of SME workspace, particularly those with short or flexible tenures. This may be because space for SMEs is perceived to be a higher risk investment and the additional costs associated with building smaller workspaces and managing multiple units.

10.8 The EDS notes that the public sector should only intervene where it can show there is a need and where intervention is likely to be effective[145]. Although the public sector alone does not have the resources required to resolve this problem it can work with the private sector to address barriers and stimulate market provision of business accommodation. This might include joint venture arrangements, providing time-limited funding to cover letting risks until sustainable occupancy rates are achieved, bringing forward public sector-owned sites at affordable rates, or assistance with site assembly. Where large, higher value schemes are proposed and there is demonstrable need for smaller or affordable industrial premises, boroughs may draw on national and regional mixed-use policy to seek planning agreements to secure provision of these as part of mixed-use schemes.

10.9 The LDA works directly with partners to provide and support a range of SME premises including managed workspaces, creative hubs, innovation centres and business incubators. The Agency has undertaken research into the supply of and demand for SME premises[146], filling a significant gap in market knowledge.

SPG 10 – Variety of industrial capacity and provision for small and medium sized industrial enterprises

In implementing London Plan policies, the Mayor will and boroughs, the LDA, TfL and other partners are asked to:

(i) manage the stock of industrial premises so that it provides a competitive offer for different types of occupier including logistics, utilities, waste management, transport functions and other related industrial activities. This will entail both improving the quality of provision to meet users' different needs, including those of SMEs and clusters of related activities, and maintaining lower cost capacity or making provision for those requiring affordable business premises to meet local needs;

(ii) protect industrial sites and premises which meet demonstrable demand for lower cost industrial accommodation;

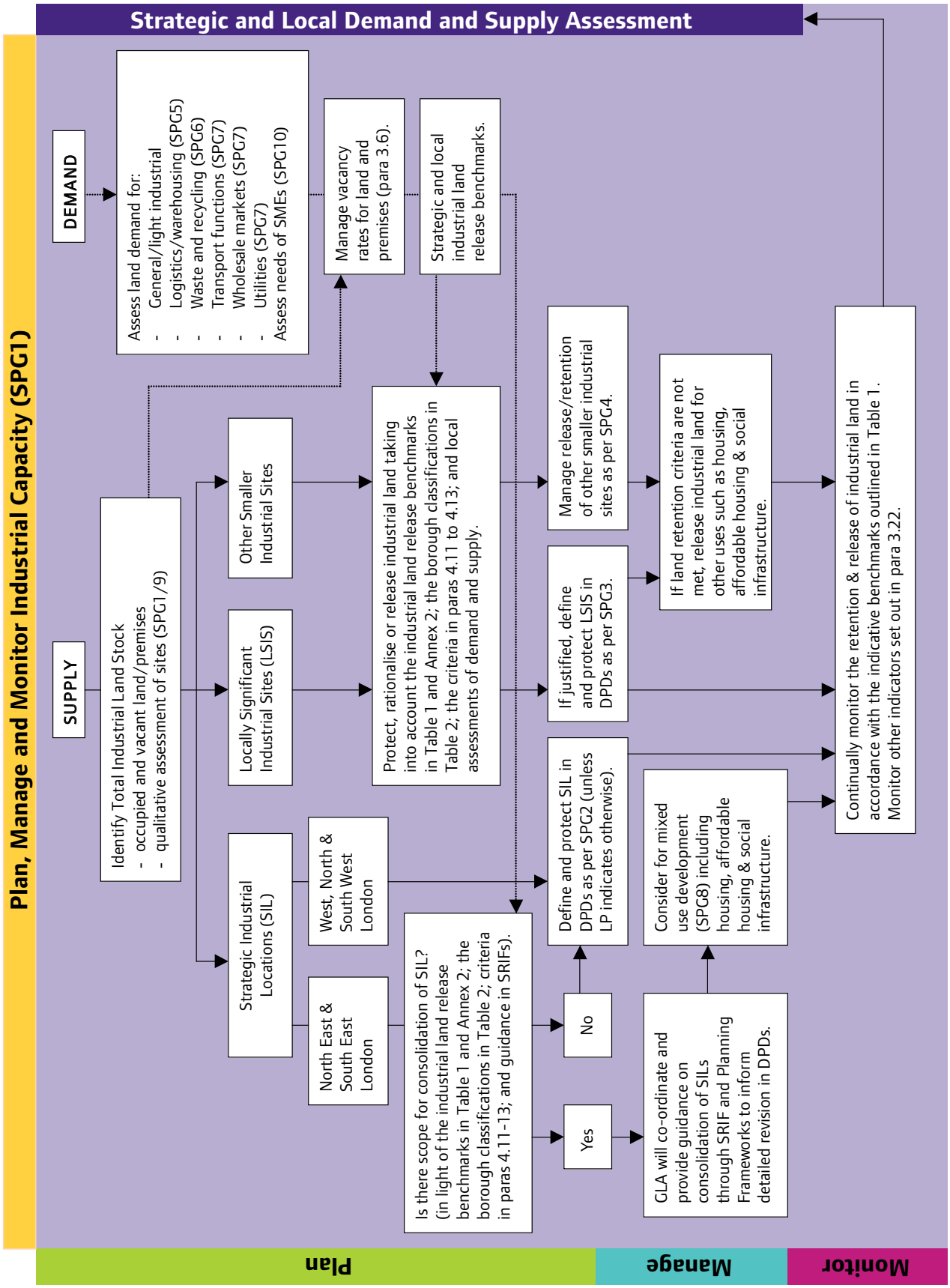
(iii) promote the provision of small industrial units and managed workspaces suitable for small and medium sized enterprises (SMEs) and start-up companies;

(iv) encourage design of industrial premises that enables easy subdivision at a later date as the space requirements of different occupiers change;

(v) secure provision of small and affordable industrial units in appropriate locations as part of larger mixed-use schemes, including commercial developments and residential schemes where careful siting, design and access arrangements can satisfactorily overcome environmental concerns.

Annex 1.

Plan, Manage and Monitor Industrial Capacity (SPG1)



Annex 2.

Indicative Industrial Land Release Benchmarks 2006-2026

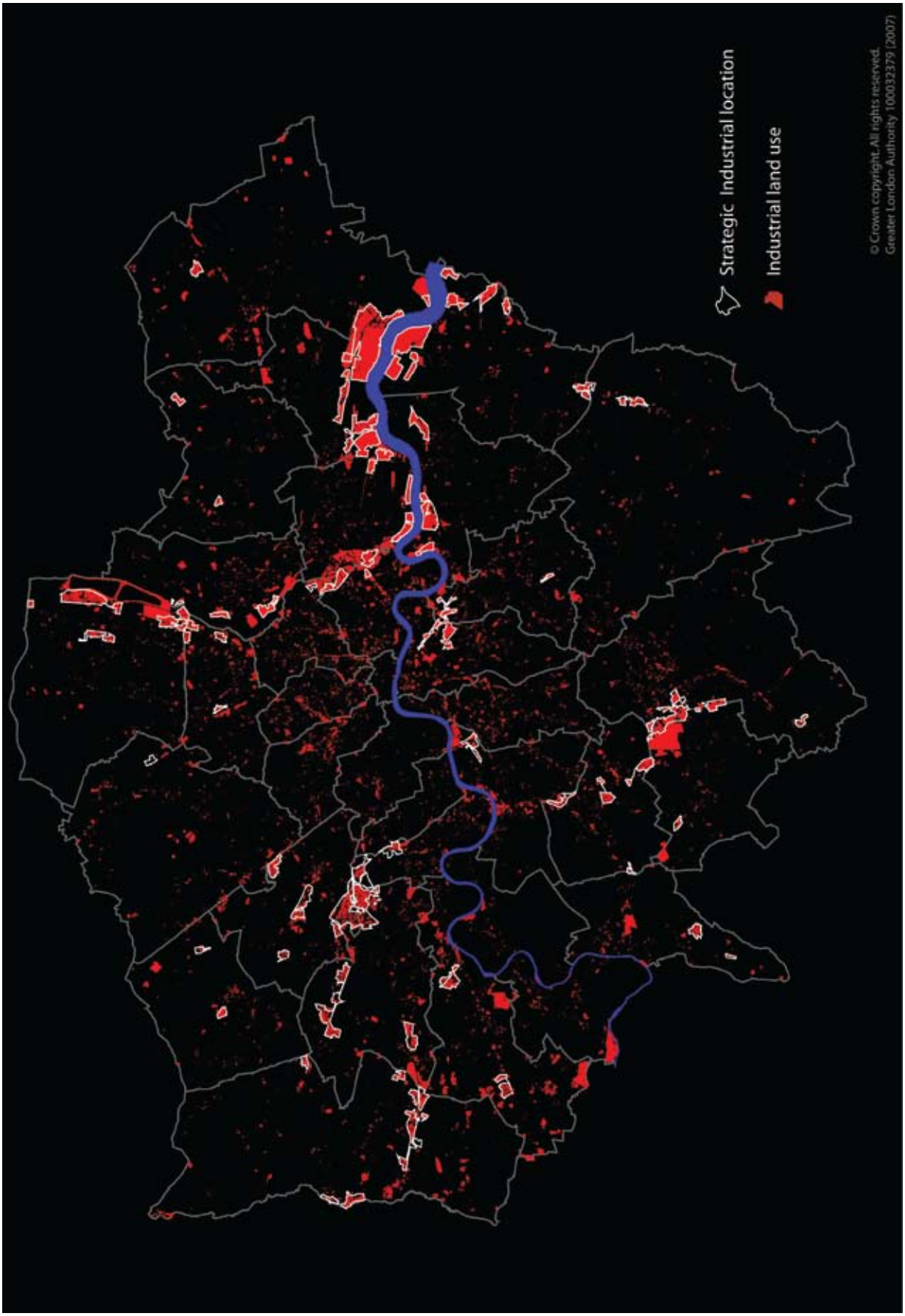
Borough/Sub-region	2001 Stock			2006 Stock			Industrial Land in SIL as % of total stock	Industrial Land Demand 2006 - 2026					Manage-ment of vacant land/ premises (ha)	Industrial land release benchmark 2006-2026 (ha)
	Built-on (ha)	Vacant (ha)	Total (ha)	Built-on (ha)	Vacant (ha)	Total (ha)		General Indus-trial (ha)	Warehousing & Logistics (ha)	Transport Functions (ha)	Waste facilities (ha)	Wholesale Markets (ha)		
Barnet	45	16	61	46	5	51	0%							
Camden	69	11	80	56	9	65	0%							
Enfield	312	72	384	302	65	367	60%							
Hackney	105	20	125	87	14	101	0%							
Haringey	120	12	132	109	11	120	35%							
Islington	72	9	81	56	3	59	0%							
Westminster	16	0	16	11	0	11	0%							
North Sub-region	**739**	**139**	**878**	**667**	**107**	**774**	**30%**	**-152**	**15**	**2**	**24**	**0**	**-75**	**-187**
Barking and Dagenham	380	86	466	374	53	427	70%							-39
City of London	0	0	0	0	0	0	0%							0
Havering	306	63	369	312	42	354	75%							-66
Newham	265	215	480	236	126	362	45%							-135
Redbridge	65	3	68	63	5	68	30%							-11
Tower Hamlets	167	26	193	143	23	166	15%							-83
Waltham Forest	146	13	159	145	13	158	35%							-33
North East Sub-region	**1329**	**407**	**1736**	**1273**	**263**	**1536**	**45%**	**-233**	**63**	**3**	**53**	**-8**	**-243**	**-366**
Bexley	329	91	420	322	91	413	65%							-45
Bromley	114	4	118	98	4	102	25%							0
Greenwich	192	45	237	162	37	199	60%							-15
Lewisham	106	14	120	90	14	104	30%							-49
Southwark	141	11	152	137	9	146	25%							-37
South East Sub-region	**882**	**165**	**1047**	**809**	**156**	**965**	**40%**	**-151**	**152**	**2**	**28**	**0**	**-176**	**-146**

Borough/Sub-region	2001 Stock			2006 Stock			Industrial Land in SIL as % of total stock	Industrial Land Demand 2006 - 2026					Manage-ment of vacant land/ premises (ha)	Industrial land release benchmark 2006-2026 (ha)
	Built-on (ha)	Vacant (ha)	Total (ha)	Built-on (ha)	Vacant (ha)	Total (ha)		General Indus-trial (ha)	Warehousing & Logistics (ha)	Transport Functions (ha)	Waste facilities (ha)	Wholesale Markets (ha)		
Croydon	166	5	171	160	5	165	45%							
Kingston-upon-Thames	61	1	62	62	1	63	45%							
Lambeth	92	2	94	86	5	91	0%							
Merton	160	4	164	161	4	165	50%							
Richmond-upon-Thames	47	4	51	47	3	50	0%							
Sutton	104	16	120	108	12	120	70%							
Wandsworth	116	6	122	119	3	122	35%							
South West sub-region	**746**	**39**	**785**	**743**	**33**	**776**	**40%**	**-166**	**59**	**3**	**51**	**0**	**-10**	**-63**
Brent	268	29	297	248	49	297	50%							
Ealing	387	48	435	370	44	414	50%							
Hammersmith and Fulham	84	7	91	71	4	75	40%							
Harrow	57	6	63	52	3	55	45%							
Hillingdon	280	32	312	280	29	309	50%							
Hounslow	313	17	330	311	15	326	20%							
Kensington and Chelsea	17	3	20	14	3	17	25%							
West Sub-region	**1406**	**142**	**1548**	**1346**	**147**	**1493**	**40%**	**-231**	**174**	**2**	**59**	**0**	**-55**	**-52**
London Total	**5102**	**892**	**5994**	**4838**	**706**	**5544**	**40%**	**-934**	**461**	**12**	**215**	**-8**	**-560**	**-814**

Sources: URS (2007) & GLA. (Note: Figures may not sum due to rounding)

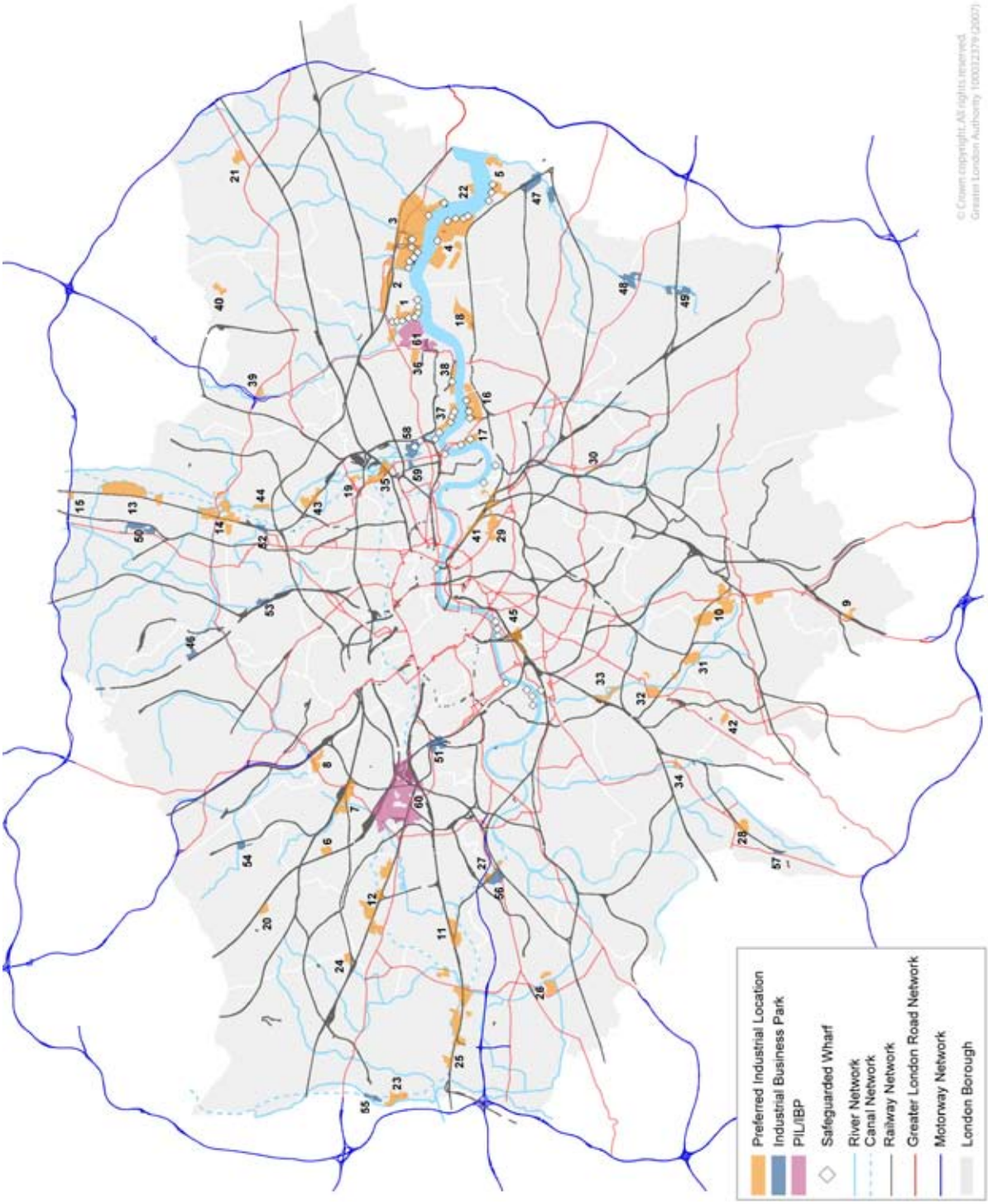
Annex 3.

Spatial Distribution of industrial land within and outside Strategic Industrial Locations in London



Annex 4.

Relationship between Strategic Industrial Locations, the road, rail, river and canal network and safeguarded wharves



Preferred Industrial Location (PIL)

1 River Road Employment Area
2 Rippleside
3 Dagenham Dock/Havering Riverside (part)
4 Belvedere Industrial Area (part)
5 Erith Riverside (part)
6 East Lane
7 Wembley (part)
8 Staples Corner
9 Mailpit Lane
10 Purley Way Area
11 Great Western (Part)
12 Northolt, Greenford, Perivale (parts)
13 Brimsdown
14 Central Leaside Business Area
15 Freezywater
16 North Charlton Employment Area
17 Greenwich Peninsula West
18 Plumstead Industrial Area
19 Hackney Wick (Part)
20 Wealdstone Industrial Area
21 Harold Hill Industrial Estate
22 Coldharbour Lane Employment Area
23 Uxbridge Industial Estate
24 Stonefield Way / Victoria Road
25 Hayes Industrial Area
26 North Feltham Trading Estate
27 Brentford (part) including Transport avenue Industrial Area, Commerce Road
28 Chessington Industrial Estate
29 Surrey Canal Area (part)
30 Bromley Road
31 Willow Lane, Beddington & Hallowfield way
32 Morden Road Factory Estate and Prince George's Road
33 North Wimbledon (part)
34 Beverley Way Industrial Area
35 Fish Island/ Marshgate Lane
36 London Industial Park
37 Thameside West
38 Thameside East
39 Southend Road Business Area
40 Hainault Industrial Estate
41 Bermondsey South East
42 Kimpton Industrial Area
43 Lea Bridge Gateway
44 Blackhorse Lane
45 Nine Elms (part)

Industrial Business Park (IBP)

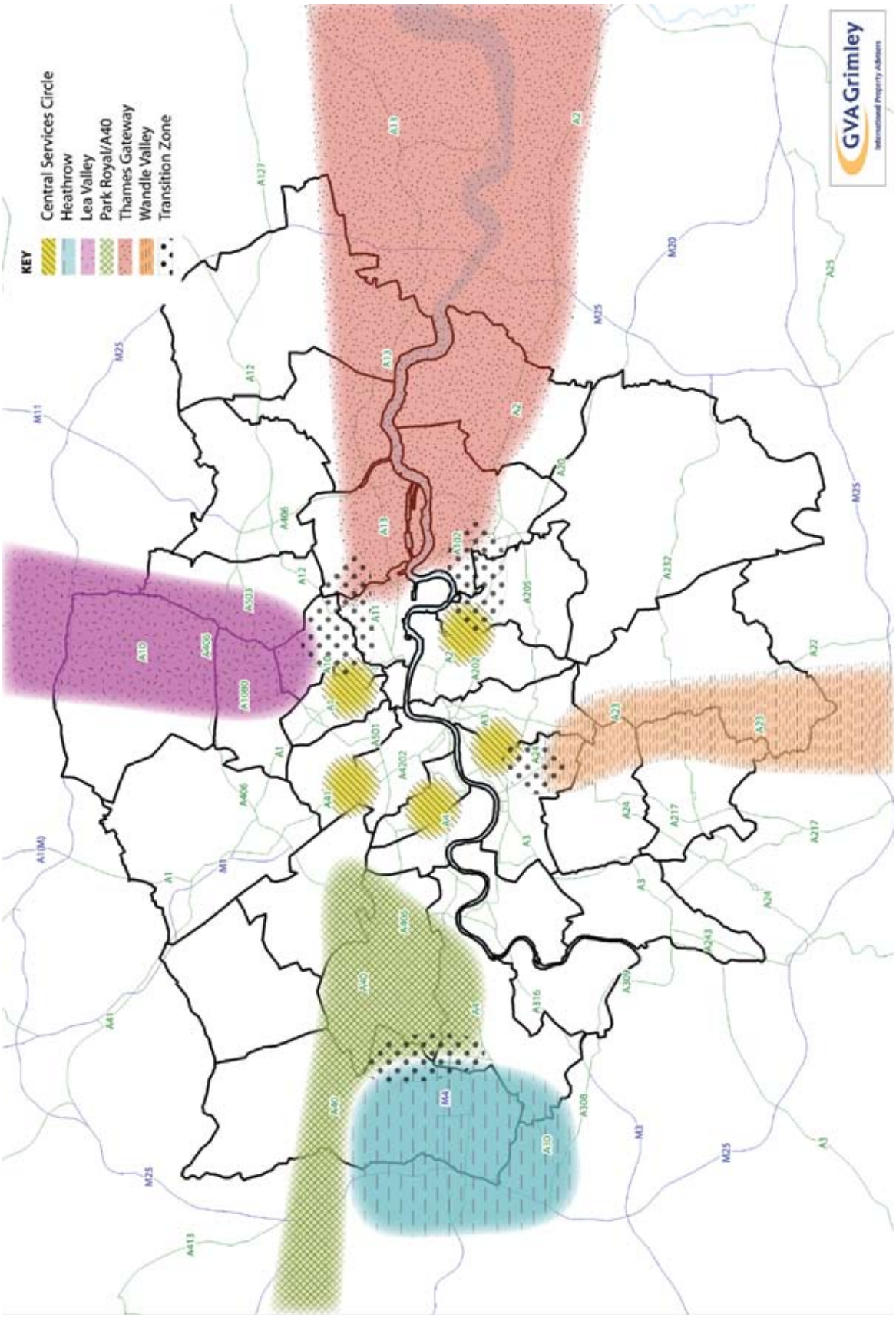
46 Northern Telecom, Brunswick Park
47 Thames Road, including Crayford Industrial Area
48 Foots Cray Business Area
49 St Mary's Cray
50 Great Cambridge Road (part)
51 Wood Lane (part), incl. Freston Road
52 Tottenham Hale
53 Wood Green (part)
54 Honeypot Lane, Stanmore (part)
55 North Uxbridge Industial Estate
56 Great West Road (part)
57 Banwell Business Park
58 British Gas Site/ Cody Road (part)
59 Empson Street (part)

PIL/IBP

60 Park Royal
61 Beckton Riverside

Annex 5.

Key Logistics Property Market Areas in London



Source: URS (2007)
Map reproduced from GBPro 200 GB (2005 edition) © Colins Bartholomew Ltd (2005) Map for representation purposes only

Annex 6.

Table A6.1 Indicative land demand for waste management and recycling

Borough	2006-2011	2011-2016	2016-2021	2006-2021
Barnet	2	2	2	6
Camden	2	2	1	5
Enfield	0	0	0	0
Hackney	0	0	1	1
Haringey	1	2	1	4
Islington	2	2	1	5
Westminster	0	2	1	3
North sub-region	**7**	**10**	**7**	**24**
Barking and Dagenham	8	4	3	15
City of London	1	1	0	2
Havering	0	0	2	2
Newham	9	4	2	15
Redbridge	3	2	1	6
Tower Hamlets	6	3	2	11
Waltham Forest	0	1	1	2
North East sub-region	**27**	**15**	**11**	**53**
Bexley	0	0	2	2
Bromley	0	6	2	8
Greenwich	1	7	2	10
Lewisham	0	0	0	0
Southwark	0	6	2	8
South East sub-region	**1**	**19**	**8**	**28**
Croydon	6	2	1	9
Kingston-upon-Thames	4	1	1	6
Lambeth	5	2	1	8
Merton	4	2	1	7
Richmond-upon-Thames	4	2	1	7
Sutton	1	1	1	3
Wandsworth	7	2	2	11
South West sub-region	**31**	**12**	**8**	**51**
Brent	4	2	1	7
Ealing	8	3	2	13
Hammersmith and Fulham	6	2	1	9
Harrow	4	1	1	6
Hillingdon	4	2	2	8
Hounslow	6	2	2	10
Kensington and Chelsea	4	1	1	6
West sub-region	**36**	**13**	**10**	**59**
London	**102**	**69**	**44**	**215**

Note: Figures based on assumption that there is no net loss of existing waste management capacity in accordance with London Plan Policy 4A.24. The figures may not sum due to rounding. Source: URS (2007) and GLA, based on July 2007 apportionment update by Jacobs Babtie, Land Use Consultants and SLR Consulting Ltd.

A6.1 Table A6.1 sets out, for indicative purposes only, the estimated land-take of *additional* waste facilities by London borough 2006-2021.

A6.2 The starting point for deriving the indicative land-take of additional waste facilities by borough is the total waste to be managed by borough (in tonnes) by 2010, 2015 and 2020. This is based upon an updated apportionment undertaken in July 2007 by consultants Jacobs Babtie[147] and addresses the recommendation of the FALP EiP Panel to use the values from most recent waste apportionment[148].

A6.3 The next step is to compare estimates of existing waste management capacity (tonnes) in each borough[149] with the total waste to be managed by borough in tonnes by 2010, 2015 and 2020. In making this comparison it is assumed that there is no net loss of existing waste management capacity in accordance with London Plan Policy 4A.24.

A6.4 Where there is a surplus of existing capacity over and above the total waste to be managed in tonnes in a borough by 2010, 2015 and 2020 then that surplus is redistributed evenly to the other boroughs (that have a deficit) in the same sub-region. Should this redistribution result in a surplus for any borough in 2010, 2015 or 2020, then again, that surplus is redistributed evenly to the other boroughs (that still have a deficit) in the same sub-region.

A6.5 Once these iterations are complete, the resulting waste management capacity (in tonnes) is converted into a land requirement and constrained to the London-wide requirement of 215 hectares[150]. After existing capacity and the redistributed surpluses are taken into account, the estimated land-take in any given borough is derived by applying the waste to be managed in that borough (in tonnes) as proportion of the London total, to the London-wide estimated land requirement of 215 hectares. So, for example if a borough is apportioned 3% of London's waste after existing waste capacity and redistributed surplus capacity are taken into account, then the borough's estimated land-take of additional waste facilities would be 3% of 215 hectares, or a total of 6.5 hectares by 2021.

A6.6 It is recognised that the actual land requirement in any given borough will inevitably depend on a number of factors including, not least, the number, type, scale and location of waste treatment and recycling facilities selected to manage the apportionment in collaboration with neighbouring boroughs where appropriate. Table 4A.7 in the London Plan illustrates the indicative throughput and land take of different types of waste facility.

Annex 7.

List of Abbreviations

BAME	Black, Asian and Minority Ethnic
CAZ	Central Activities Zone
DPD	Development Plan Document
EiP	Examination in Public
GLA	Greater London Authority
GVA	Gross Value Added
IBP	Industrial Business Park
LDA	London Development Agency
LDF	Local Development Framework
LSIS	Locally Significant Industrial Site
PDL	Previously developed land
PIL	Preferred Industrial Location
PPG	Planning Policy Guidance
PPS	Planning Policy Statement
PTAL	Public Transport Accessibility Level
SIC	Standard Industrial Classification
SIL	Strategic Industrial Location
SMEs	Small and medium sized enterprises
SPG	Supplementary Planning Guidance
SREDIP	Sub-Regional Economic Development Implementation Plan
SRDF	Sub-Regional Development Framework
SRIF	Sub-Regional Implementation Framework
TfL	Transport for London
UCC	Urban Consolidation Centre

Annex 8.

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Hindi

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Vietnamese

Nếu bạn muốn có văn bản tài liệu này bằng ngôn ngữ của mình, hãy liên hệ theo số điện thoại hoặc địa chỉ dưới đây.

Bengali

আপনি যদি আপনার ভাষায় এই দলিলের প্রতিলিপি (কপি) চান, তা হলে নীচের ফোন নম্বরে বা ঠিকানায় অনুগ্রহ করে যোগাযোগ করুন।

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Urdu

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Gujarati

જો તમને આ દસ્તાવેજની નકલ તમારી ભાષામાં જોઈતી હોય તો, કૃપા કરી આપેલ નંબર ઉપર ફોન કરો અથવા નીચેના સરનામે સંપર્ક સાધો.

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London SE1 2AA

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